TOrCCh

TOWARDS ORGANISATIONAL CULTURE CHANGE

Better practice in aged care

A guide to the TOrCCh process
for workteam members

WESTERN AUSTRALIAN CENTRE FOR
HEALTH AGEING

RSL care

Curtin University

Acknowledgements

About TOrCCh
(Towards Organisational Culture Change)

In 2012, the TOrCCh team developed a TOrCCh Toolkit to support staff teams to achieve changes in practice.

The project was implemented in residential care facilities in both WA and Queensland. Evaluation confirmed that the TOrCCh toolkit enabled facility change and was used successfully in a variety of residential care settings.

The workbook was developed directly from the toolkit, in response to users' feedback.

Foreword

I am continually impressed by the improvements and success stories that can be seen in aged care. Committed and caring people working to provide better lives often find more efficient and cost-effective approaches. With the inevitable financial challenges and the drive to get things done with less, such success comes from people who have a passion and make the choice to get involved.

The TOrCCh toolkit provides step by step processes to help unlock that passion to achieve lasting change. From unpicking a challenge and brainstorming options, making action plans and communicating, the toolkit is based on action learning and the understanding that the cycle of change is continuous.

With its step-by-step practical approach, workbook format and real-life examples, the toolkit will help develop work teams able to identify issues and improve results. I'm very impressed by the approach to evaluation included in the toolkit, not just to help work teams check if they achieved their goals, but to celebrate success. And in the true spirit of a good change project, the toolkit for organisational culture change has been trialled, improved upon and shown to work. Achieving sustainable improvements in aged care just got a little bit easier!

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Australian Government
Australian Aged Care Quality Agency

Contents

About the workteam members' workbook

The workteam members' workbook is for use by teams making a change in residential aged care facilities. Each workteam member should have their own members' workbook.

The step by step process will help your workteam make a change that you think is important.

Have a look at the workbook. As you can see the workbook has several different areas:
- Why would I use this? Gives you information about the purpose of the step you are looking at.
- How do I use this? Gives you information about how to put each step into action.
- Case study: shows you an example of how this has worked in the past.
- The Blue steps: provide a detailed step by step guide on how to make a change.
- Note section: is for your own use. Perhaps put the answers from the blue steps in the notes, or write any decisions that you have made as a team.

You may need to revisit a step on a few occasions if it is not completed during your meeting. That's OK, some steps will take longer than others. Its important that you complete the process.

The workteam leaders' workbook is slightly more detailed than the members workbook and contains a section on Group Discussion. This is a discussion you can have as a team on a particular step to really help you understand the process.

Terms used frequently in this workbook

Topic/problem: something that you have decided to improve upon or a problem you and your team would like to address.

Issues: understanding and unpicking what is REALLY behind the topic/problem.

Project: how you are going to address your problem or topic, from planning to evaluation.

How TOrCCh works – an example

Topic/problem: residents losing clothing leading to family members and residents being very upset about the lost items.

Issues: The laundry staff have no way of identifying personal clothing and carers feel they do not have time to sort through linen from the laundry

Project: Start a labelling system which all staff will implement.

Your role as a workteam member

- You have been chosen or volunteered to join the workteam.

- You will need to discuss this project with your direct line manager. Explain when the meetings will be held and how much time away from your usual duties you will need.

- Ask for support from your manager, explain that this is an opportunity to learn new skills in a unique way.

- Talk to your work colleagues. Explain about the meetings and when you will be unavailable.

- This is an active group. Your thoughts and actions will make this change happen.

- Don't be afraid to speak up and contribute to your change project. This is a chance to gain new skills and knowledge, to try new things and to push yourself forward.

- Use the notes section to write down your notes or decisions made by the team each meeting.

- You will need to attend most meetings. If you can't attend make sure that you tell the workteam leader. Discuss with the team, how are you going to do this?

- If you miss a meeting YOU are responsible for catching up with your colleagues and finding out what happened at the last meeting.

- If a meeting is cancelled you will need to re-schedule.

- The MOST important area in this process is communication. Make sure you keep communicating from the start of the project to the end with the following people:

    Your manager

    Your work colleagues

    People outside of your usual team

    Residents and their families (if applicable)

    Other team members in the workteam

- Tell as many people as possible about your project, what you are working on, the decisions that you made as a team and the benefits that you are finding from being involved.

How to use this workbook

This workbook is divided into 4 colour coded sections:

Building a team (yellow)

Planning a change (green)

Taking action (blue)

Checking results (pink)

Each section leads on to the next section. This model is based on the principles of Action Learning (please read the reference material if you want to know more) and the cycle is continuous. There will usually be another project or issue to complete, or a need to further develop or improve upon your original project.

The model will be used all the way through this flipchart (through colour coding) so that you can easily see where you are in the process.

Definition of roles

Facility Manager (or project "sponsor"): The facility manager is a key person within the organisation who has "sponsored" the project and instigates the change process within their facility. This person is not necessarily involved with the key activities of the workteam, but has overarching responsibility and accountability for the workteam and their project.

Key activities:

Initiates the change process within the facility. Can see the benefit of the process and communicates this process to senior staff. The facility manager may have some ideas about different projects or activities that could be addressed.

Allocates the role of workteam leader to an appropriate person in the facility. In a smaller facility the sponsor may also assume the role of the team leader.

Attends the first and last meetings and any additional meetings as required by the project workteam.

Responsible for the decisions regarding allocation of staff to the change project as part of the workteam and allowing staff time away from usual duties.

Support the workteams as they make their change, for example help with problem solving if required, promoting the change project to other staff, encourage the workteam to speak at meetings.

Acts as a resource for the workteams – contact point for staff to discuss issues if unable to resolve within the workteam. Responsible for the allocation of resources such as funding and materials for the workteam.

Attends final meeting to congratulate workteam and celebrate success.

Helps with the larger promotion of the project over a 12 week period and considers ways the message can be sent facility wide.

Definition of roles

Workteam leader: The workteam leader provides leadership and mentors the workteam.

The workteam leaders' role is more "hands on" within the workteam than the facility manager/sponsor.

Key activities:

Chooses the composition of the workteam, liaising with the facility manager or sponsor. This will be between 8-10 people from different areas and different roles within the facility.

Discusses the requirements of the workteam with the workteam members prior to them commencing.

Arranges for the release of staff from their usual duties with the workteam member's immediate supervisor.

Works to raise facility wide staff awareness of the project.

With input from the workteam, allocates a venue and meeting times and dates.

With input from the workteam, allocates one person to write the responses to each step in the process.
This can either be on a template (please download from the website) or on a separate book for this project.

Is responsible for ensuring that the change process is followed as per the flipchart.

Acts as a mentor and support person for the workteam. Helps to guide decision making whilst encouraging professional growth with the workteam.

If the workteam leader is going to be absent for a meeting, it is their responsibility to choose a leader for the workteam in their absence. This person would assume the leadership role as described above.

Definition of roles

Note taker: The role of the note taker is to record the decisions made by the workteam so that there is a clear history of what happened at each meeting.

Key activities:

Using a blank exercise book, butcher's paper or downloaded templates "tools" from the website, records all the decisions made by the workteam.

Seeks clarification if unsure about what decisions have been made.

After completing a step, or a tool, reads the decisions back to the workteam.

Brings paper, or the tools, to each meeting.

If unable to attend a meeting, asks someone else from the workteam to be the note taker.

How to use the workteam members' workbook

- This workbook is divided into sections which are mirrored in the workteam leaders' guide.

- The blue diagrams give information concerning the process in a step by step way. We have called this "steps".

- The next section "Why would I use this" and "How do I use this" follows the step process and gives more information, explaining the steps in detail.

- The section labelled "Leaders' information" is extra information that may assist the leader of the workteam. This section includes key messages and extra tips and gives a fuller explanation to guide the workteam through the steps, and answers some common questions that the workteam may have about the process.

- Finally the last section "Workteam discussion", contains a topic to be discussed as a workteam. You can put a time limit on this (perhaps 10 minutes). Your team can choose to have a workteam discussion when you feel there are still issues that need to be addressed in this step.

In this section you will go through the following steps:

1. How to run a workteam

2. How to set ground rules

3. How to choose a topic

How to run a workteam

Why would I use this?

It's important to discuss how you will work together as a team. Questions such as "who will be the note taker?" and "when will we meet?" need to be considered.

How do I use this?

1. Discuss the questions using the step *how to run a work team* and write down the teams' response.

2. Develop a contacts sheet with everyone's preferred contact details on and give a copy to all team members.

3. You may ask one person to assume the role of note taker for each meeting recording the decisions made at each step or maybe downloading the steps in a "tools" format for the note taker to complete. This note taker role can change each meeting.

Case study

In the past a group decided to have only one person lead the meeting (the workteam leader), but decided to share the responsibility of taking the notes amongst the group. During the project the group realised that they would need to have a back up person to lead the group in case the workteam leader was unable to attend the meeting. This was important to ensure that the group continued to meet regularly in order to achieve their goals.

In the beginning the group decided to meet fortnightly however after their first meeting they realised that they would need to meet weekly otherwise they would not be able to achieve their goals.

What's the best way to keep in touch with each other?

Where and when will we have our meetings?

How often will we meet?

Who will be the leader of our group? Who will be the note taker?

If we don't agree, how will we solve our conflict?

Here is a section for you to make notes

How to set ground rules

Why would I use this?

At the beginning of your meeting, think about how you want the meetings to run. What is important to you as a group? The workteam need ground rules to make sure the group runs efficiently and fairly and that everyone feels they can make a contribution and be listened to.

How do I use this?

To assist in identifying a topic consider the following strategies:

1.   Discuss the questions using the step *how to set ground rules* and consider how the meetings will run.

2.   What issues are important? Which ones are not?

3.   Do you need to make sure you start and finish on time? Or do you allow five minutes for everyone to arrive?

4.   Write your meeting rules down on butcher's paper and make sure that at every meeting these rules are displayed where the workteam can see them.

Case study

The workteam decided to use the values clarification activity in the resources section to help identify ground rules. They discussed their personal values, personal values at work, formal work values, and informal work values. This activity gave the workteam a good idea of what their shared values: honesty and trust; energy and a strong work ethic; organisation; dedication and selflessness; a sense of humor and a sense of fun; discipline; compassion and a commitment to listen and to hear. This helped them decide what their ground rules would be.

Do we need to turn pagers off or to silent? What happens if someone is called away?

How will we make sure everyone has a chance to speak openly?

What happens when someone doesn't contribute to the discussion?

Do we want to start and finish exactly on time, or allow extra time before we start for late comers?

Here is a section for you to make notes

Choosing a change topic

Why would I use this?

You will need to choose a topic or something to improve upon. You may already have an issue in mind which could be explored further. Sometimes, your manager or the workteam leader can suggest a topic.

The issue will need to be:

- A facility wide issue, not just applicable to one area in the facility.

- Able to be addressed in approximately 12 weeks.

- Something that you feel passionate or strongly about, so that it becomes your project.

How do I use this?

To assist in identifying a topic consider the following strategies:

1. Discuss the questions using the step *choosing a change topic*. Think about the tasks you achieve regularly. Is there something that has been bothering you that you want to improve on? Put all suggestions on a whiteboard or paper and vote on the most popular.

2. Talk to your colleagues, have they got ideas about a topic?

3. A suggestion box in the tea room, where staff put anonymous suggestions for an improvement, or a change, could be useful. Then go through the box and tally the results.

4. Talk to your workteam leader: is there something that could be addressed?

Case study

The workteam put a suggestion box in the staff room and invited other staff across the facility to put forward some ideas on what they would like to change in their workplace. They told all the staff about their suggestion box at a team meeting and encouraged everyone to make a suggestion. They advised staff that their suggestion would need to be something that related to improving communication, leadership, teamwork and/or staff empowerment. They also asked that the ideas were something that could be achieved in about 12 weeks.

The workteam decided to focus on reducing the number of lost property items as they agreed that this topic would be something that would be achievable in a 12 week period. It would also be feasible to evaluate if their improvements had made a difference.

The team leader then discussed the topic with the facility manager to make sure s/he agreed with the topic.

Choosing a change topic

Discuss as a workteam, is there a topic you have already identified?

Do individuals have suggestions? Vote on the most popular.

Talk to your colleagues, do they have suggestions?

Use a suggestion box and tally the results.

Does your workteam leader have any suggestions?

Here is a section for you to make notes

In this section you will go through the following steps:

1. How to understand the issues behind a topic

2. How to plan your action
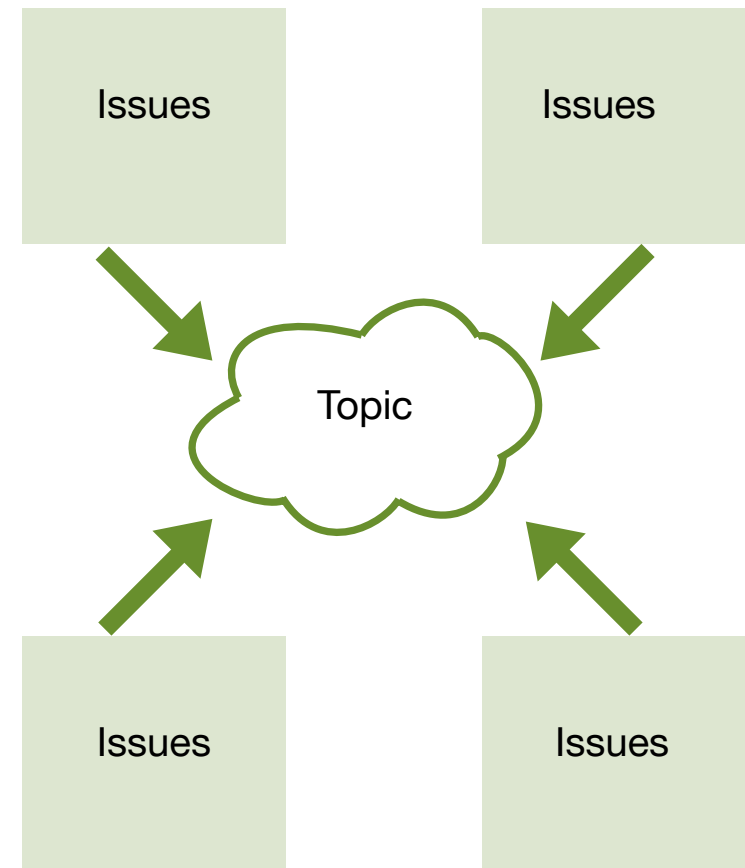
3. How to plan your evaluation
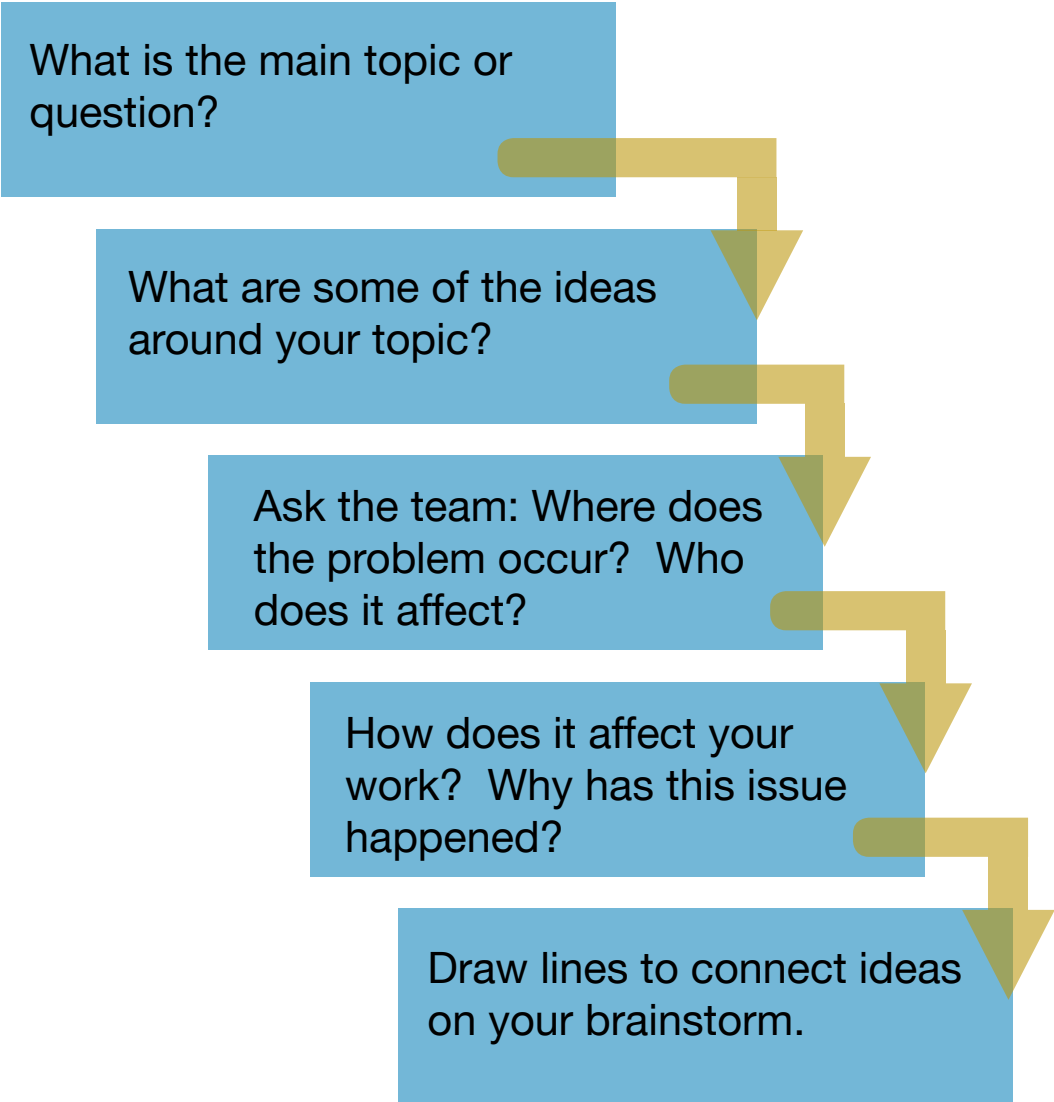
Why would I use this?

This process starts with you identifying a topic in the workplace that you would like to work on. Brainstorming will help you unpack what's behind the topic and help you decide what aspects of the topic you really want to focus on.

How do I use this?

1. Discuss the questions using the step *understanding the issues behind the change topic.*

2. What is the main idea or question you are asking? Discuss this as a workteam: **what do you want to work on?**

3. Put the main idea or question you are asking in the middle of the page, writing inside the bubble.

4. The workteam can then suggest ideas or concepts around your main topic. **What are the issues here?**

5. Use colours, arrows and branches to link ideas together. It will help to identify the relationships between ideas which can be important in understanding how ideas relate to each other.

6. Leave lots of space around the topic so that you can easily add ideas later.

Issues

Issues

Topic

Issues

Issues

What is the main topic or question?

What are some of the ideas around your topic?

Ask the team: Where does the problem occur? Who does it affect?

How does it affect your work? Why has this issue happened?

Draw lines to connect ideas on your brainstorm.

Here is a section for you to make notes

Plan your action

Why would I use this?

You may have a very clear idea about the topic and what needs to change. Now, you will need to plan how you are going to address this topic. When actions are put on paper, you may find there are gaps. The plan will help ensure the workteam have covered all the areas that need to be looked at.

How do I use this?

To assist in identifying a topic consider the following strategies:

1. Discuss the questions using the step *plan your action*. Look back at your butcher's paper or the whiteboard where you captured your brainstorming activity to make sure you are covering everything.

2. Now decide as a workteam **HOW** you will solve your issue or address your problem? **WHO** will do **WHAT** action? When deciding try and make it easy for the team to complete their actions. Do you need any resources? Where will the team find those resources?

3. You have now made an **action plan**.

Case study

The group used the information recorded during their brainstorming activity to help them plan the next steps for their lost property project. The suggestions that were recorded were added to the action plan. Each objective included: tasks to be carried out, who would be responsible and what resources would need to be used. So for example, one member of the team (Gill) needed to look at the costs of buying a permanent marker. The team decided that Gill would investigate the cost and bring the information back to the team at the next meeting so that a decision could be made.

The action plan was reviewed at every meeting and any new objectives were added to the plan when required.

The team leader then took the action plan to the facility manager so that s/he could approve the workteam's actions and understand what was happening in the workteam.

Plan your action

What are you trying to achieve?

How are you going to achieve this goal?

Who is responsible for each task?

Are there any resources you will need?

How will you communicate with your manager about this plan?

Here is a section for you to make notes

Plan the evaluation of the change

Why would I use this?

How will you know if your action has changed anything? Evaluation is important to see if you have achieved success. Planning the evaluation NOW means that you will know what you are trying to achieve from the start.

How do I use this?

1. Discuss the questions using the step *plan the evaluation of the change*.

2. As a team, discuss what information will show that you have answered your question or addressed the issues. So for example, if you are focusing on a staff issue, perhaps collect absenteeism data.

3. Think about the information you can easily collect which will show that your project is a success. Think about the information that is already being collected in your facility.

4. Consider **who** will collect this information and **how** they will collect the information. Do you need to ask permission to get this information?

5. You have now made an **evaluation plan**.

6. After completing your discussion go back to your **action plan**. Do you need to add any actions? Do you need to make any changes?

Case study

During the brainstorming activity the workteam talked about the issue of lost property in their facility. The workteam had put together an action plan to help work towards their goal of reducing the number of lost property items. They decided that before putting their improvements into place they would need to record the number of lost property items. They agreed that this would help them to measure whether the improvements were successful in reducing the number of lost property items.

After completing their evaluation plan the workteam reviewed their answers and added new items to their action plan. One of the items that they agreed on was to raise awareness about their project. They recorded this in their action plan.

As the team worked through their project they reviewed their evaluation plan at every meeting and added new items to their action plan if required. The laundry staff provided the workteam with the lost property numbers at each point. If the numbers did not show improvements, the workteam discussed and made adjustments to their process and updated their action plan.

Plan the evaluation of the change

What information do you need to show that your project has worked?

Is there information you are already collecting that could be used?

Do you need to ask your manager or workteam leader before you collect this information?

Who will collect this information and when?

What are you going to do with the results? Who will you tell about your project?

Here is a section for you to make notes
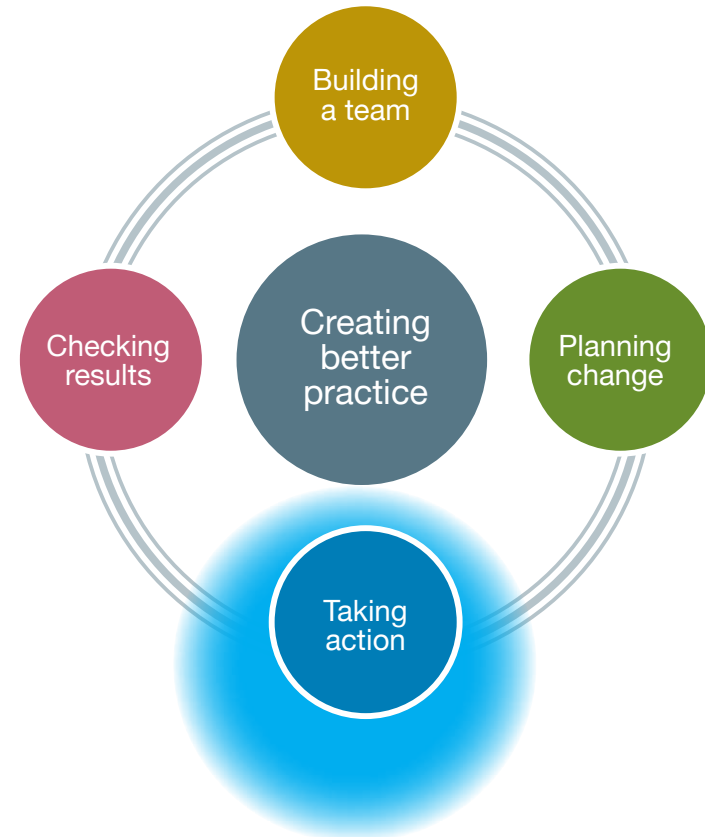
In this section you will go through the following steps:

1. How to get others on board

2. How to keep it going

Building a team

Creating better practice

Planning change

Checking results

Taking action

Getting others on board

Why would I use this?

This is a vital step in the process! How are you going to tell other staff about your progress and your change? What messages do people need to hear about your change? You have worked hard and now is NOT the time to be shy! Make sure staff, residents and family know what you have been working on.

How do I use this?

1. Discuss the questions using the step *getting others on board*.

2. Think about how different people, for example your manager or the maintenance staff, may need to hear different information. Information shared with facility staff may be different to information shared with families.

3. If you are in doubt as to what information to give to a particular workteam, talk to your manager. Do you need to talk to families about your change? What's the usual way for communicating with family members? Can you do this now? Who can help you?

4. Think of different ways of communicating. For example emails, posters, newsletters, and attending regular meetings.

Case study

The workteam had chosen their lost property topic. They had started putting together their action plan and had also started planning how they would evaluate their project. An important part of doing any project is to make sure that other staff, managers, residents and residents' families were also aware of your project.

They spoke to all these people at team meetings, residents' meetings and through email.

The workteam decided during their brainstorming activity that it would be useful to gather suggestions from other staff, their manager, residents and residents' families on things that the workteam could trial to see if they could reduce the number of lost property items. This gave the workteam the opportunity to raise awareness about what they were hoping to achieve and at the same time it also engaged others in the project.

Each time the workteam met they would discuss how their project was going, adding any new items to their action plan.

Staff: Think about how you will tell staff about your change? What information will your manager need to know?

Residents: What's the best way to tell them? For example, discussions during regular meetings, information at nurses' stations, post in their letter box, discuss one on one or a poster?

Family: What information will families need to know about your project?

Other? Is there anyone else who would like to know about your project? What about head office? What about other facilities? What about other carers working in your state?

Here is a section for you to make notes

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Keeping it going

Why would I use this?

At each meeting the team will need to put the plans that you have developed into practice. This task will last a few weeks and is actually when you put your plans into action!

How do I use this?

1. Each meeting discuss the questions using the step *keeping it going*.

2. Think about the minutes. Perhaps you have been making notes in the workteam members guide, or using separate pieces of paper. Is this working for your group?

3. Look at your action plan. What did you plan to do. Follow it through.

4. Look at the evaluation plan. When can you start evaluating your project? What did you plan to do?

5. Communication is VITAL all the way through your project …. keep talking!

6. Think about your team. How's everything going?

Case study

The workteam talked about the note taker role. They found that taking minutes at each meeting was very important to be able to track where they were up to. The minutes were also really useful for staff who were unable to attend the meeting to keep informed about the progress. The workteam made a copy of the minutes available after each meeting and placed these on the noticeboard in the staff room. This was a great way for the workteam to communicate across the facility.

Another important template was the action plan: the workteam continued to update the action plan at each meeting. By identifying what needed to be done and who was responsible this kept the workteam on track to achieve their goal of reducing the number of lost property items.

As the workteam worked through their project they looked at their action plan at every meeting and made any changes to the evaluation plan if needed or just reminded each other what needed to be done next.

Each meeting look at the minutes from the previous meeting. What needed to be achieved by this meeting? Has it been achieved? Record in your minutes for this meeting.

Each meeting review your action plan. What has been planned? Who was going to do this? When? Record in your minutes.

Each meeting review your evaluation plan. What has been achieved this week? What needs to be done next week? By whom? Record in your minutes.

Each week, think about communicating outside of the workteam. Add any actions to your action plan. Record your achievements in your minutes.

How is your team working? Are there any issues that need addressing? Are you following the ground rules set out at the beginning?

Here is a section for you to make notes

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In this section you will go through the following steps:

1. How to acknowledge and celebrate success

2. How to reflect on your project

Building a team

Planning change

Creating better practice

Checking results

Taking action
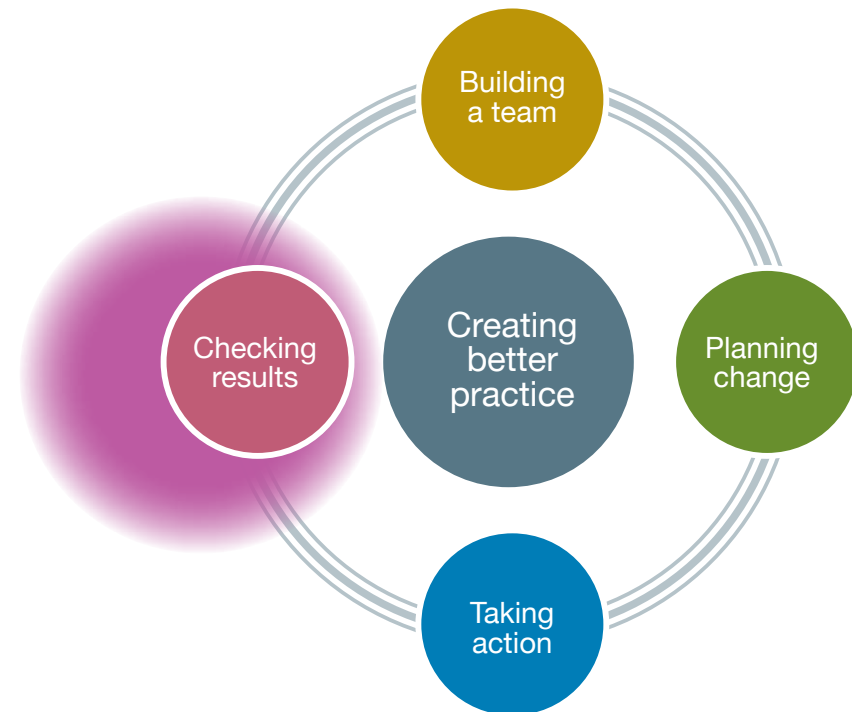
Why would I use this?

Now you have reached the end of your project! Congratulations! However, don't let your hard work go to waste.

How do I use this?

1. Discuss the questions using the step *acknowledge and celebrate success.*

2. What was your original topic? Have you addressed this?

3. Think about the sustainability of the change. How will you make sure that you are not addressing the same topic in future? Who do you need to talk to in order to make your project sustainable?

4. Do you need any resources to keep the project going? How are you going to get them? From whom?

5. Teams often forget to celebrate their own success. This is an important step in the whole process, DON'T leave it out! How do you want to celebrate?

Case study

During their final meeting the workteam assessed their lost property topic. They all agreed that they had achieved success by reducing the number of lost property items. They decided that if they wanted this improvement to continue they would need to make sure that all staff, residents and families were aware of the new process. The workteam leader agreed to speak to the manager about how they planned to continue to keep the number of lost items reduced which included:

1. Continue to communicate with current staff, residents and families about the importance of following the process of labeling clothing etc.
2. Ensure that new residents and families are given an information sheet on the process of labeling clothing.
3. Add this process to the orientation program for new staff.

The workteam also decided that they would hold a morning tea to celebrate. The workteam wanted to share this with their manager, other staff, residents and their families, as they had all played a part in making the project a success.

Go back and look at your brainstorming. Have you addressed your issue?

Why do you think this change should be kept going? How are you going to do that?

Who do you need to talk to keep the outcomes from project sustainable?

Think about the tasks you have achieved. Talk about this as a workteam.

CELEBRATE!

Here is a section for you to make notes

Reflection

Why would I use this?

It's a really great idea at the end of a project to reflect on what has happened.

How do I use this?

1.   Discuss the questions using the step *reflection*. What really worked well and what were the challenges?

2.   Different people in your workteam may have different opinions about what worked well. That's normal as everyone will take away something different about being involved with the project.

Case study

When the workteam got together to reflect on their lost property project, some of the workteam agreed that changing their meetings from fortnightly to weekly had worked really well for them.

One of the staff commented that she had noticed that one of her colleagues had really come out of her shell and seemed a lot more confident. Others agreed.

The workteam also discussed that they felt closer as a team and they now held a better understanding of each other's roles in the facility. Whereas before, the hospitality staff were not really aware of what the care staff did and vice versa.

They noted that although the communication within the workteam had improved they did not see as much improvement across the facility. This was something that the team decided to work on to make sure that their project was sustainable.

Reflection

What worked well? Why do you think it worked so well?

What didn't work well? Why do you think it didn't work?

Are there any changes you would like to make to how you carried out the project?

How has this project affected the people in your workteam?

How has this project affected people outside of your workteam?

Here is a section for you to make notes

Other resources available

You may be interested in further resources available for your workteam to use:

There are tools which are based on the blue steps we have used in this guide.

Tools additional to the steps in this guide, that some groups may find helpful, are also provided.

You will also find information which may help if you have any further questions about any of the steps or simply want to know more.

These resources are available via www.wacha.org.au

We hope you have enjoyed using the TOrCCh process and have found it useful in your workplace.

Now that you have completed this process, can you think of any other topics you might want to address?

Is there another project you would like to tackle as a team?

Have you got any feedback or suggestions regarding TOrCCh?

Please contact: wacha@uwa.edu.au