



**driving change through
performance management
aged care reform**





Introduction

Australia's aged care system is under reform.

As funding and service models head down the path of giving consumers greater choice, there is a very real concern that we may not have enough skilled workers to care for our ageing population in the future.

Current projections suggest that the aged care workforce will need to triple by 2050 if we are to meet the needs of 3.5 million older Australians. Recruitment and retention is set to be an ongoing challenge as demand for staff with specialised knowledge and diverse skillsets increases. Competition for talent will be high and employers will be compelled to invest in the upskilling and development of their existing staff in order to deliver services.

Australia's changing aged care requirements

The makeup of older Australia has changed. There is now even greater variation in health status, disability, location, cultural and language needs, sexual orientation and gender identification than ever before.

With the miracle of modern medicine, people are living longer. But they are also requiring more specialised treatments in areas such as dementia and palliative care than earlier generations.

Consumer expectations

Older Australians want to be living independently for as long as possible.^[1]

Today's aged care consumers have higher incomes and higher expectations of material comfort and lifestyle choices than generations gone by. They want control over who, when and what type of services they receive, as well as the flexibility to chop and change.

They also don't want multiple carers - somebody doing domestic services, somebody coming in to do their medication, somebody else coming in to do their personal care and somebody taking them to a social activity. They want to be cared for by a single person with the skills to do all of these things.^[1]

Changing models of care

"...five years ago, 70 percent of our residents would have been low care and 30 percent were high care. Within five years that has flipped and 70 percent were high care and 30 percent were in low care"

Ms Joanne Christie - Bethanie Group Inc ^[2]

Older Australians are staying in their own homes longer thanks to an expanding range of in-home or community care services such as meals, personal care assistance, help with household chores, transport, rehabilitation and respite care.

Traditional aged care facilities are now moving towards high-intensity care. With the trend towards low care patients living independently, older people are now typically only entering aged care facilities once their care needs are beyond what can be provided to them in their own home.

Impact on the aged care workforce



Older Australians want a skilled, respectful workforce able to spend time with them.^[1]

Need for qualified people with diverse skills

As consumer expectations change and care models adapt to meet new requirements, providers must ensure their organisations have the right mix of skills to deliver new services.

The aged care workforce of the future will not only require more workers but will need to broaden its capabilities to assist with increasingly complex needs including:

- Dementia and cognitive impairment
- Mental illness
- Communication disorders
- Complex psychological situations
- Palliative Care and bereavement support
- HIV
- Respite care
- Transitioning patients to new levels of care

Regardless of whether care takes place in the home or in a residential setting, meeting these needs will require the collaboration of a number of skilled workers, including personal care workers, nurses, allied health practitioners and medical professionals.

Unfortunately, there has been a steady decline in the number of nurses choosing aged care as a career. In the past these shortages have been managed by shifting workloads from nursing staff to lower skilled community care workers or residential personal care assistants. However as the number of older Australians with high care needs increases, so too will the demand for qualified nursing staff with the skills to administer medication and medical care.

Recognising the problem, the industry is calling for upskilling of lower skilled staff like personal care workers in order to fill higher skilled vacancies like enrolled nursing.

Regional and remote workers

31% of older Australians live in inner and outer regional areas. Approximately 1.5% of all Australians aged 65 years or older live in remote or very remote areas.^[2]

Workforce initiatives must consider that there will be strong demand for services in regional and remote areas and take measures to ensure staff are equipped with the skills, knowledge and experience to be effective in those locations.

Managing workplace change through performance management

Transitioning a workforce to new jobs and skills is a complex change management task. It requires high levels of consultation and communication to adequately explain what changes are being made and what it means for each individual.

This requires leaders to put themselves in their employees' shoes; to understand their perspective, engage in real two-way dialogue, and focus on providing adequate training, mentoring and coaching for employees affected by change.

Identifying the skills required to make a successful transition, and working with staff to develop new competencies has become a critical part of modern performance management.



Modern performance management cycle

Modern performance management is a future focused conversation about a person's development. Unlike traditional methods where managers deliver a performance review once a year, employees participate in a series of shorter, but more regular formal and informal reflection, goal setting, coaching and feedback discussions that steer and support performance and development over time.



Reflection and assessment

Effective performance management begins with self-reflection under the guidance of a supervisor, coach or mentor.

Reflection starts with an accurate understanding about what is expected of a person in their job.

Setting performance expectations

To perform well, employees need to understand:

- why a job exists;
- where it fits into your organisation;
- how it contributes to the overall objectives of your organisation;
- what is expected of the person's performance; and
- any changes that will impact their work and how this will affect performance

Reflecting on past performance

Part of good performance management is helping staff take a step back to ask themselves what it is they are actually doing, and how well they're doing it.

- What results have I produced?
- What impact has my work had on the people I serve?
- How have I acted with clients, colleagues, and supervisors?
- How have I demonstrated our organisation's values?
- Have I followed process and procedures?
- How will I adapt to any changes?

Capability frameworks

Performance = Results + Behaviours

Job performance is comprised of results (outcomes and objectives that must be achieved) and behaviours (actions and how your people go about their work).

Behaviour is often overlooked as one of the key levers of performance. But if you are an aged care provider sending staff into the field and into people's homes for the first time, you need to be sure that they understand how to behave and that they represent your brand and embody the values of your organisation in every way.

When you and your employee agree on what must be achieved (the results) and how to go about achieving it (actions and behaviours), you establish a formula for success.



Flexible goal setting

Armed with a more realistic picture of their performance, and what they want to work on, staff are then in a strong position to focus on goal setting.

Changing goals mid-performance cycle

It sounds logical to set long-term goals and then work towards them. Planning over the long term isn't a bad thing; but a lot can happen during that time.

You may discover that a goal that once seemed desirable may end up seeming like a bad idea (for a whole barrel of reasons) or potentially becoming a waste of time in the wake of a further change.

To accomplish truly meaningful goals, all participants must be willing to question assumptions and re-evaluate as necessary. Is this a realistic goal for the individual? Is this still a priority? Are there more pressing or productive ways the person could be investing in their development?

Catching up with employees more regularly becomes critical to ensuring that the right focus is maintained, particularly as their jobs change.

Professional development and upskilling

Modern performance management is development focused. It ensures managers and staff are identifying the competencies required for a person to do their job well and goes about building on and enhancing their current skills, knowledge and abilities in tangible ways.

A study by the National Centre for Vocational Education Research into workplace training practices in the aged care sector suggests that performance management caters for the training needs of staff and fosters a training culture in the workplace.^[3]

Formal accreditation

New entrants to the industry undertake training and education through the VET or higher education system. According to peak body LASA, the quality of training is highly variable and many courses are too short to provide learners with appropriate levels of skills.^[4]

Some employers suggest they upskill their own workers with in-house training. Other larger and better resourced aged care facilities have even been granted registered training organisation status for limited training. That said, it is clear there are still large inconsistencies in the quality and nature of staff training undertaken between providers.

A senate enquiry into the future of the aged care workforce has recommended the industry work with the Australian Skills Quality Authority to establish nationally consistent minimum standards for training and accreditation. Not only would this improve the consistency of graduates but could also see more staff undertaking further formal training and accreditation in aged care during their career.^[2]

Multiple modes of learning

Beyond formal qualifications, staff will also need to develop their knowledge in specialist topics and higher level 'soft skills' to do their jobs effectively in the future. In the aged care setting, soft skills include communication with patients, bereavement counselling for families, collaboration skills for working with partner organisations, problem solving as care issues arise in the field, and decision making while working independently. Providers will need to invest in ongoing learning and development to equip staff to deal with their expanding requirements.

Professional development activities are most successful when staff have the opportunity to make sense of new information using a combination of interactive approaches. This is a bit like the 70:20:10 model for learning and development first founded in the 1980's. It maintains that individuals obtain 70 percent of their knowledge from job-related experiences, 20 percent from interactions with others, and 10 percent from formal educational events.

There are a number of cost effective and higher impact alternatives to traditional training methods that providers can employ:

Research projects - a staff member is given a task requiring them to independently seek out knowledge and then apply it back on the job;

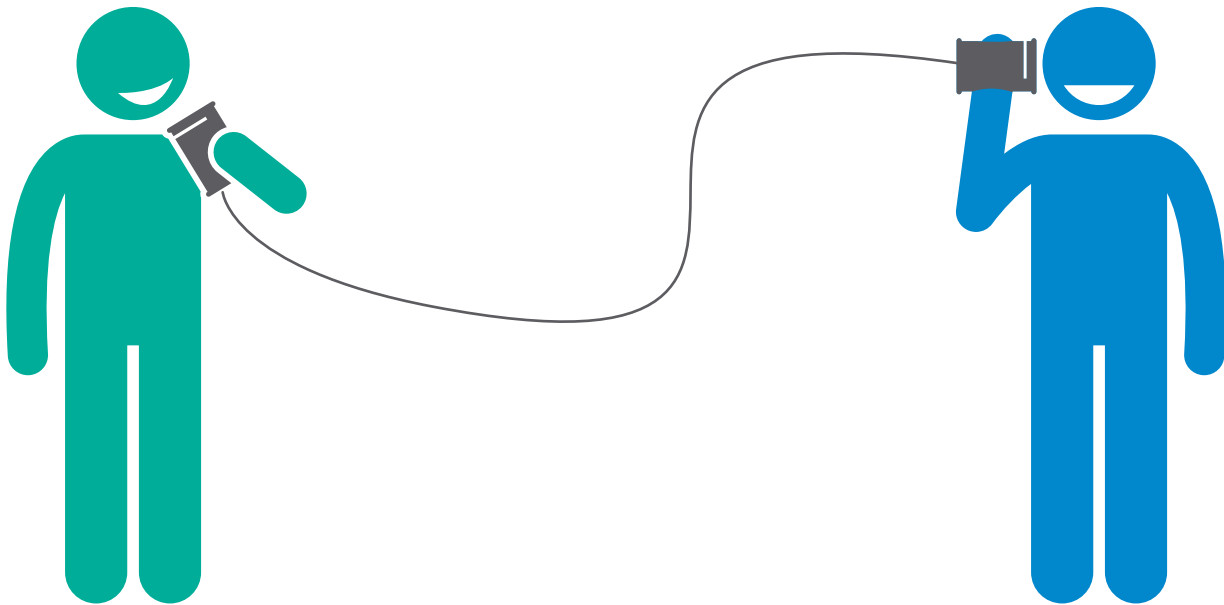
- **Peer discussions and collaboration** - groups of staff are brought together in a facilitated discussion to talk over issues and develop strategies for dealing with them
- **Field observations** - individuals are paired with a subject matter expert that models how new knowledge can be applied effectively on the job
- **Coaching** - occurs when a supervisor or experienced colleague provides guidance and on-the-job performance feedback
- **Mentoring** - a carefully selected, more experienced person provides wisdom and advice to help an employee achieve their goals
- **Just-in time** - web based learning that can be accessed on demand when the learner needs it.



Frequent feedback and regular check-ins

This is the linchpin of successful performance management. Feedback doesn't always have to involve a scheduled sit-down meeting. Some of the best feedback occurs spontaneously - in the moment, on the job. Where and how it happens doesn't necessarily matter (as long it is done respectfully and not in the earshot of clients or team members). What is important is that the feedback is timely and meaningful.

Face to face feedback is enriching but can also be universally challenging when there are tough conversations to be had. A firm foundation of trust, and the creation of a culture where regular feedback (both good and bad) is the norm, can make all the difference in whether a person takes feedback on board.



Supervisor feedback

Most staff want feedback from their Supervisor.

But it can be difficult for leaders to find the time to get around to staff in the field to observe performance and provide feedback. In such cases it may be better to delegate and share the responsibility with senior staff in the organisation rather than not do it at all.

Frequent field visits and informal chats are helpful for building trust. Understandably, staff are more likely to accept criticism from a leader that has followed their progress and given them lots of positive comments in the past, so it is important that a supervisor takes advantage of as many opportunities to talk about performance and change in as balanced a way as possible.

Other sources of feedback

Even the best leaders can't be across everything their staff do. Significant contributions could easily go unnoticed or ideas and innovation go unrecognised if a staff member's only source of feedback is their supervisor.

It is important to empower employees with the tools to seek feedback from other sources as well in order to gain a more rounded view of themselves.

Peer feedback

Co-workers performing similar jobs can sometimes have a better understanding of their peer's performance than supervisors and upper management. They can also provide a valuable perspective for the feedback process.

Client feedback

If a staff member is in a client facing role, consumer feedback is probably going to provide the most direct and valuable insights into a person's performance.

Subordinate feedback

Collecting feedback from subordinates enables leaders to really understand how their reports see them.

Annual performance review

After 12 months of formal and informal feedback and coaching discussions, the annual performance review becomes an opportunity to look back at what has been achieved.

And instead of just filing away the paperwork at the end of the year, the outcomes and learnings from the Performance Management cycle form the basis for discussion and reflection needed to set new goals in the next performance cycle.

The role of managers

Managers need to be coaches. They need to move beyond the action-oriented traditional management functions of planning, organising, staffing, coordinating and controlling, and master the subtle art of focusing, challenging, influencing, encouraging, and developing staff.

Providing a safe environment

One of the reasons for breaking performance management down into bite-sized chunks rather than just a once a year, formal discussion, is to make it less threatening. Staff need to feel safe that if they open up about their struggles or admit to failings that they aren't going to be punished for it or marked as an underperformer on their annual performance review.

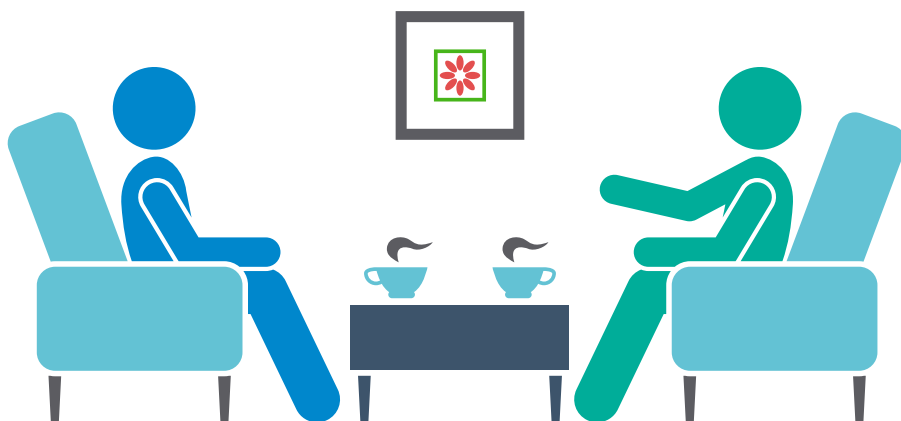
When employees trust their manager and sense they have a vision for them, they are more receptive to feedback. They take on board criticisms and advice knowing their manager has their best interests at heart. They also know they have someone to turn to if they need help or have problems.

Streamlining the process

There are many reasons why performance discussions don't get done:

- People are too busy
- Lack of preparation
- The process is unnecessarily cumbersome and keeps being put off

A lot of these issues can be avoided with better planning and execution.



Scheduling

The performance management cycle can begin and end at any time. Following a particular timetable is OK so long as you don't forget about new team members.

Robust monitoring and tracking processes can help to ensure no-one is missed.

Using technology

Good performance management software can really make the process easy. A great system will guide you through the process of reflecting on performance (objectives and behaviours) and help you structure SMART goals for development.

A system that is easy to use and mobile compatible will also ensure that records of feedback and development activities such as training and coaching are always kept in one place for easy reference and can be accessed and used by regional and remote staff.

An added advantage of using software is that it keeps the process paper free - no more employee files busting at the seams!

Aligning people with strategy

Staff experience greater job satisfaction when they are given the opportunity to develop their skills and understand the difference they make to the lives of people they care for. They also cope better with change when they understand what is happening and what it means for them as an individual.

Development focused performance management is a powerful tool for aligning your organisation to strategy and preparing it for change. It enriches the careers and lives of aged care employees and keeps them focused on their future in the industry.

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