



HACC Model for Client Engagement

The HACC program is a joint Federal and State Government initiative providing basic support to older people, and to younger people with disabilities and their carers, to enhance their independence and to avoid premature or inappropriate admission to residential care.

HACC Tasmania's model for client engagement aims to raise awareness and understanding of client engagement issues and strategies to continuously improve client contributions, client empowerment and care. Enhanced client engagement has also shown, that as relationships shift towards new balances, to contribute toward greater work satisfaction, joy and shared growth.

Values and Foundation

Values

- Empowerment
- Travelling the road together
- Empathy
- Establish client goals first, rather than service perspective
- Honesty
- Trust
- Compassion / understanding
- Shades of grey
- Openness to go both ways (Communication)
- Shared ownership / accountability
- Flexibility
- Heart felt service / personal care with clients feeling important and valued

From client consultation to engagement¹

Consumer or client² engagement is the continuous and dynamic process of interaction and communication between clients, staff and all stakeholders to best meet the needs of clients, to identify future needs of clients or the wider community and to best facilitate learning, personal growth and improvements.

Principles

'Whatever you do ... think client involvement'.
Consumer engagement workshop participant (March 2010)

As HACC service organisations our key functions are client focussed to best address changing client needs and issues. The overarching principle or question should be: is client engagement embedded in organisational plans, policies and procedures?

Client engagement should be implemented and evaluated at all levels of the organisation and at all levels of activities.

Clients, like volunteers and stakeholders, are viewed and empowered as team members and are consulted and involved in service planning, delivery and reviewing.

Resources are allocated to improve client engagement programs and activities.



1. Governance, Leadership and Management

The service may:

- 1.1. *Facilitate the role of clients as board members and / or facilitate the training of clients to effectively work in an advisory (group) capacity to the Board, to management or to specific programs or services.*
- 1.2. *Develop an overarching client engagement policy and strategy (and related action plan). The policy/strategy should include qualitative and quantitative annual targets and reporting mechanisms. The policy and strategy should also include approaches that aim to continuously:*
 - *Seek client input;*
 - *Seek engagement and participation by clients;*
 - *Consult where appropriate; and*
 - *Improve staff – client communication and relationships.*
- 1.3. *Establish, resource and support a consumer engagement working party, led by a senior staff member and 'champion' who demonstrates understanding, leadership and passion for client engagement.*
- 1.4. *Involve clients in the organisation's quality assurance or quality framework program and related planning and review processes.*
- 1.5. *Plan and allocate adequate resources, in an integrated way, to establish, maintain and review the service's client engagement policy, strategy and activities.*



2. Services, Programs and Communication

The service may:

- 2.1. *Review the needs of the wider community to determine any unmet or future needs, future client groups and their related special or emerging needs, and any service gaps or service access issues.*
- 2.2. *Recognise clients as key team members and partners and apply a range of strategies to empower clients with a view to improve client engagement, care, self-care, self-determination and wellbeing.*
- 2.3. *Encourage client engagement and establish mechanisms for growing and continuous client input and involvement in planning, delivery and review of programs and services.*
- 2.4. *Establish mechanisms for the provision of information to clients about services and programs, including rights, responsibilities and the range of opportunities to be involved. This should include the organisation's client engagement policy and practices and how clients can be actively involved in the creation and dissemination of information.*
- 2.5. *Develop and negotiate services, programs and individual service plans with clients, family members or carers to ensure services are appropriate, timely, focussed on positive outcomes and coordinated. This should include coordination with or referrals to other services.*
- 2.6. *Actively seek and document feedback, at individual staff, team and organisational levels, as a means of continuous improvement and client engagement. Feedback sought may include:*
 - *Planned, regular activities (e.g. surveys, consultations, etc);*
 - *Informal activities or processes;*
 - *Compliments and complaints;*
 - *Seeking ideas, suggestions; and*
 - *The development and use of innovative means that promote increased engagement, communication and care.*

All feedback received is acted upon, investigated and prioritised. Actions taken are communicated in a broad and timely manner, at least to the individuals or groups involved and the Board.
- 2.7. *Provide alternatives if individuals are not comfortable or satisfied with the service's response to feedback, suggestions or complaints.*
- 2.8. *Establish client engagement mechanisms or activities that are culturally sensitive and appropriate and that focus on the consideration and/or inclusion of particularly vulnerable groups or individuals.*
- 2.9. *Research, adapt, adjust, create or design relevant and innovative client engagement activities or programs that foster care, positive interaction, team spirit, participation, shared decision making and ownership.*
- 2.10. *Establish and maintain a program by which consumer journeys, stories or case studies are captured, documented and shared/told. A range of media can be used to capture, tell/share and utilise 'narrative enquiry' as a tool to improve engagement activities, services and for cultural change.*



3. People, Partnerships, the Community

The service may:

- 3.1. *Extend the recognition of clients as partners / team members to volunteers, carers, family members and significant others with the intention of:*
 - *Facilitating client involvement in the establishment and maintenance of all external relationships;*
 - *Empowering and engaging clients and significant others;*
 - *Encouraging involvement in planning and decision making;*
 - *Making services, programs and all activities understandable and transparent; and*
 - *Continuously identifying determinants of wellbeing and addressing specific or emerging needs accordingly.*
- 3.2. *Enter into formal and informal agreements or relationships with other organisations, consumer/client groups, etc. and effectively work with them to ensure continuous, sustainable programs, services and supports to maximise client and community engagement.*
- 3.3. *Establish effective mechanisms to enhance organisational and individual capacities of staff, volunteers, carers, stakeholders and clients to engage effectively and efficiently with clients.*

This may include the development or improvement of philosophy, culture and approach of inviting or enhancing client involvement at all levels and in all interactions, activities and processes; ranging from small degrees of engagement to higher degrees or levels³.
- 3.4. *Develop (train) and support clients in advisory capacity roles for input into management and decision making processes and into planning, service delivery and review.*
- 3.5. *Extend practices such as mentoring, supervision and staff development to clients to share and enhance their competencies and participation.*
- 3.6. *Identify and amend relevant human resources functions to support the culture and practice of client engagement.*
 - *This may include staff induction processes, staff training and the overall organisational cultural development to achieve increased and improved client engagement.*
 - *Examples may be the inclusion of clients on recruitment panels and client engagement selection criteria and / or duty statement in position descriptions.*
- 3.7. *Research, collect information and use industry benchmarks relating to client engagement for the review and development of services and programs. This may include the establishment of relationships with client representative bodies and participation in relevant forums etc.*

The HACC Client Engagement Model was developed during a multi-phased consultation program in 2009/2010. HACC clients, carers, staff, service managers and stakeholders of the HACC program participated. Providers are encouraged to use one or several of the 22 model elements for implementation or *client engagement pilots*. The model can be used as a guide or resource and will be supported by TasCOSS with a range of implementation and evaluation tools.

The model will be reviewed at regular intervals as our experience grows. For any discussion or further information please feel welcome to contact the TasCOSS HACC program: (03) 6231 0755, admin@tascoss.org.au or klaus@tascoss.org.au.

¹ During past workshops Tasmanian HACC Service Providers unanimously adopted the terms 'clients' instead of 'consumers'.

² The term 'client' also includes carers or advocates where appropriate throughout the document.

³ Measures of levels of engagement outlined in the international literature are: low1: inform, low2: gather information; medium1: discuss, medium2: engage; and high: partner (form equal partnerships with clients or client groups).