Estate Management operating model No 3: frequently asked questions

Questions frequently asked or asked at the Information Session held on 28 October 2021

Operating model questions

Is there Technical training support in the new model?

Yes. The Manager, Technical Development role remains but has been retitled to Manager, Knowledge support. The practice team will play a significant role in building capability of staff.

Estate Management will work with Strategy, People & Governance to establish a structured Induction and ongoing professional development plan that supports the ongoing learning and professional development of staff.

Can we provide a preference for a role?

We have adopted feedback so that existing staff can provide preferences for roles in Foundation, Proactive and Private Management teams. New roles in the Independence and Support area will be advertised. The direct assignment at step 1 of the placement process will provide job security by advising eligible staff that they have been matched to an ongoing role in the new structure and the grade. The letter will not include the stream allocation of the role, e.g. Foundation or Proactive. Expressions of interest will be called for at a later date so staff can provide their input on preferred roles before being placed in a stream. Noting that sometimes staff may be assigned to a role based on organisational need.

Is proactive financial management the same as case management?

No. The proposed proactive management teams involve staff actively engaging with customers or their family/carer in relation to the ongoing management of their financial affairs rather than broader case management. This means we are looking at a proactive approach, rather than having to rely on a reactive way of delivering service.

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Some staff have suggested aligning 'areas' with Public Guardian so that there is a consistent contact opportunity and knowledge sharing between the two divisions. Is this a possibility for consideration in the structure of the new model?

The PG operating model and structure has been considered when developing the EM operating model. For example feedback was adopted to align the NCAT Liaison Officer to the same grade as the role in PG. As the services and customers are different, the structure will need to reflect these differences. However, there are many similarities with the PG operating model, another example is the Practice & Strategy team.

You (the Director, Estate Management) mentioned the inclusion of SME in the structure, how do you propose utilising SME Resources in the new structure?

The allocation of Subject Matter Experts to the Practice Team is to support the building of capability in staff across a range of practice areas such as Disability/NDIS, Aged Care, Mental Health. The practice area will be determined by analysis of feedback from staff, complaints data, customer need etc. It is envisaged that SME allocation will be fluid and they will move in and out of the practice team. This will enable staff to further develop their skills in training etc and contribute to their career opportunities. They will work closely with Managers and Principal Client Service Officers to support staff in their knowledge. They will also be involved in induction and ongoing professional development for staff.

At this time of year & workload how will staff be able to work collaboratively with EM team to workshop / implement some of the changes planned without this effecting the level of service to our customers?

In addition to workshops, there will be opportunities to provide input into the work of the EM Review team through other means that are less likely to impact on staff time, such as lunch and learn type sessions. There will be an opportunity to provide input through usual means, such as generic email.

Customers preferred way? do you really feel customers will prefer the proposed "shared caseload" this is a pivotal element of the proposal that I feel will not work successfully

Customer matters will be allocated according to the effort required to address the complexity of the individual customer’s needs. Matters of higher complexity will be allocated to individual staff. In addition the EM Review Team will consider how we can provide the best service and as much stability for staff and customers as possible during the transition.

Implementation, recruitment, role allocation and location questions

Can staff put their hand up for a position instead of being allocated to a role (through an EOI process)?

No, if you are matched to a role by direct assignment in step 1 of the placement process, you will not be eligible for an Expression of Interest in step 2. You can apply for remaining roles when they are advertised externally at step 3.

Will there be any indication of what roles will be released to the public i.e. not filled by EOI? How will these roles be released to the public? A staged approach?

Communication will be provided to Estate Management staff when roles are advertised externally. The timing of advertising will depend on whether the roles are new and can be advertised as soon as step 1 is complete or whether there are roles that are subject to EOIs at step 2. For roles where there are EOI processes, remaining roles that are similar would need to wait for the EOI to be finalised before being advertised externally.

Can in house staff apply for jobs as expression of interest instead of going through normal recruitment process? What are the possibility of existing staff growth? Will preference be given to in house staff before jobs are advertised outside?

Eligible ongoing staff matched at step 1, direct assignment of the placement process will not be eligible to apply for roles by Expression of Interest at step 2. Remaining roles advertised externally at step 3 can be applied for by ongoing staff, temporary staff and contractors.

One of the NSW Government Premier's Priorities focuses on homelessness. There are a small group of NSWTG who fall into this group, as well as many more who are often on the brink of homelessness. Why do the proposed CSC changes delete ALL reference to homelessness, homeless customers, customers with substance misuse, regular contact with criminal justice system etc? The proposed removal of this group would appear to contradict the current NSW government priority, especially when DCJ who we are part of, is the lead agency in delivering this priority.

We took on board feedback in relation to role descriptions for the CSC and reference to homelessness has been included in final role descriptions. Any changes to the role descriptions, will not impact on the work of the CSC.

Most of our clients are financially managed because of their disability or intellectual issues, how are they to provide reliable information for this change? Also with such a work load that we currently have, how is there an expectation that we drop what we need to do for our clients to be able to collaborate? will overtime be made available so we can catch up on work?

The Director Estate Management was referencing discussing with customers about how they would like to be communicated with when we provide a financial management service, however, people with disability have a right, and seek, to be involved in their life decisions. We will continue to proactively engage with our customers.

Is there any consideration to use these funds to upgrade operating systems like CIS, TEAMS, TRIM to one intergraded program?

No. Funding allocated by Treasury can only be used for staffing, not IT upgrades because of the type of funding. The budget bid was for an increase to CSO to improve services to customers based on the complexity of their needs. We will need to report back to Treasury and NSW Government more broadly on how we spent the funds.

What are the next steps?

There will be very little change in the short term. You will continue to do the work you do in your current team. As we work through the placement process, people will continue with their current work, workload and their current role description will still apply until confirmation in writing is received by staff.

As we undertake the next steps to transition to the new model, further information will be provided on team allocation and changes to work. The Project team will continue to focus on the next steps (Refer to Pg 22 'Estate Management/Processes') of the *EMR Final Draft Slide Deck.*

The Project Team will, shortly, be in touch with staff to engage you in focus and working groups and other ways, to progress planning for developing processes to:

- ensure engagement happens in a way that meets customer needs
- allocate customers based on complexity
- identify customers to move from foundation teams to proactive management
- allocate customers in proactive teams and CSOs based on complexity
- identify customers to move to independence

Progression of elements of the transition to the revised operating model, and draft structure will occur over a period of time:

- Now until the end of December 2021
    - Engagement re the next steps above
    - Steps 1-3 to fill positions (Refer Pp28-31 '*EMR Final Draft Slide Deck'* - this means we will have existing roles filled and be in recruitment for additional roles.

    - Establish trials of some of the ideas such as developing an Allocation Framework based upon the complexity of the needs of our customers. This will occur in the current Client Establishment team
    - A Transition Plan will be developed
- Jan 2022 – March 2022
    - Work on the next steps will continue towards, evaluation, review, and implementation
    - We will welcome our new staff to Estate Management
    - New staff will be onboarded and provided with 2 weeks induction, followed by a structured ongoing induction program
    - The configuration of teams will be determined, and transition plan established
- Apr – Jun 2022
    - Full implementation will occur where we will move from implementation to business as usual

Both the Estate Management review and Public Guardian Ways of Working have been included in the Organisation's assurance/audit strategic plan for 2021/22. Implementation of both operating models will be independently reviewed prior to implementation to provide assurance. This will be a multiple stage assurance review and the scope will include reviewing:
- Checkpoint review of proposed transition
- Identification of key risks and issues with implementation and providing recommendations
- Risk identification and management strategies to ensure sustainability
- The operation of the PG Ways of Working and Financial Management review

Information about staff consultation sessions

Estate Management staff can access a recording of the consultation session held on 27 September.

- Recording – part one
- Recording – part two

Associated documents and a recording of the latest information session are available on the Estate Management Division SharePoint site.

Want to talk to someone?

If you have questions, you can also contact:

- Deb Simpson, Director, Estate Management Deborah.Simpson@tag.nsw.gov.au
- Nalini Sharma, Senior Manager People & Performance nalini.sharma@tag.nsw.gov.au
- Lianne Carter, Manager Talent & Learning: lianne.carter@tag.nsw.gov.au

Employee Assistance Provider

This is overwhelmingly positive news, however if you are concerned, remember to talk with your manager. We also provide access to counselling for you and your family, for personal and work-related issues, through our Employee Assistance Program provider, Benestar. This confidential service is staffed 24 hours a day, seven days a week on 1300 360 364.

Still have a question?

If your question isn't answered here, take a look at the Budget Enhancement frequently asked questions.