

Staff consultation tool

The purpose of this document is to assist with the change management piece in moving towards and through any alterations to existing practices in the intake and triage space.

This document supports the development, trial and evaluation of a demand management framework for the community legal sector – and is a resource for capturing team reflections before and after implementing demand management changes.

It is critical in any change management piece that all of the stakeholders feel they have been consulted.

Suggested method for the team meeting *before* changes are implemented

Before the meeting

Nominate someone to facilitate the discussion – preferably someone confident in facilitating and neutral (i.e. not directly involved in intakes, giving legal advice, or setting up the new processes).

Nominate a different person to take notes of the discussion.

Preparing people for the session

- Set up the session as a chance to learn from one another
- Ask people to look at the questions, below, ahead of time

Ask **intake workers** to reflect on the following question, and come ready to offer feedback at the team meeting:

1. On a scale of 1-5 (1 = not confident at all, 5 is extremely confident), how confident are you now in completing intakes that accurately assess:
 - a. Urgency
 - b. Suitability for assistance by the centre
 - c. Area of law
 - d. Client vulnerability
2. Which of the following external factors have a **major** impact on your confidence in completing accurate intakes:
 - a. Busyness of the centre
 - b. Legal matter type
 - c. Client aggression
 - d. Other factors (jot them down)
 - e. None of the above
3. What makes doing intakes most satisfying?

4. What would make doing intakes more satisfying?

Ask **lawyers** to reflect on the following questions before the meeting:

On a scale of 1-5 (1 = not confident at all, 5 is extremely confident),

1. How confident are you now that intakes have accurately assessed:
 - a. Urgency
 - b. Suitability for assistance by the centre
 - c. Area of law
 - d. Client vulnerability
2. Are there particular client cohorts or legal matter types which you think are less likely to be accurately assessed? What are they? Do you know the external factors that influence this?

2. At the meeting

- Establish agreement about how the group will work together to share responsibility for giving everyone a chance to contribute and be heard
- Remind people the day is about learning, needs to be a safe space, and that creating a safe space is dependent on how everyone works together

Confidence in intakes

Facilitator: Ask four rounds of questions of **intake workers** based on the following. You could ask people to show fingers 1-5, write a number 1-5 on post-it notes and hand it to the facilitator, or create an anonymous online poll (e.g. menti.com) so people can provide feedback via their smartphones. An anonymous option like the post-it notes or online poll might create a safer environment to answer honestly, which could increase the accuracy of answers.

How confident are you (1-5; 1 = not confident at all, 5 is extremely confident) in completing intakes that accurately assess:

- a. Urgency
- b. Suitability for assistance by the centre
- c. Area of law
- d. Client vulnerability

Note taker: record response for each dimension of intakes

Facilitator: Ask four rounds of questions of **lawyers** based on the following. Again, consider methods ranging from show of fingers, anonymous post-it notes or an anonymous online poll..

How confident are you now that intakes have accurately assessed:

- a. Urgency

- b. Suitability for assistance by the centre
- c. Area of law
- d. Client vulnerability

Note taker: record responses

Facilitator make an observation about whether there's a convergence or divergence between what the two different teams said. Particularly if people are not confident - remind them the planned changes should improve confidence for intake workers and lawyers – aiming to make this better.

Factors affecting intake

Facilitator: ask intake workers which of the following external factors have a **major** impact on their confidence in completing accurate intakes (show of hands, invite people to comment if they wish to):

- a. Busyness of the centre
- b. Legal matter type
- c. Client aggression
- d. Other factors (ask people to say what they are and see if other people agree)
- e. None of the above

Note taker: record responses for each factor

Facilitator: ask lawyers - are there particular client cohorts or legal matter types which you think are less likely to be accurately assessed, and why? Facilitate discussion to understand if lawyers identify similar or different factors

Note taker: record responses

3. After the meeting

1. Undertake to prepare a write up of the session
2. Circulate for people to look at
3. Invite discussion at a subsequent team meeting – does what we heard from one another suggest we need to do anything additional or different as we embark on the changes we have planned?

Suggested method for the team meeting *after* changes are implemented

1. Before the meeting

Nominate someone to facilitate the discussion – similar consideration to facilitation of the earlier session.

Nominate someone to take notes of the discussion.

Preparing people for the session

- Set up the day by as a chance to learn from one another
- Ask people to look at the questions ahead of time

Ask **intake workers** to reflect on the following question, and come ready to offer feedback at the team meeting:

1. On a scale of 1-5 (1 = no impact , 5 high impact), what impact have the changes had on your confidence in completing intakes that accurately assess:
 - a. Urgency
 - b. Suitability for assistance by the centre
 - c. Area of law
 - d. Client vulnerability
2. Think about the changes and tools that have been implemented to support intake processes. What effect have these had on your confidence in completing accurate intakes in the context of the following external factors:
 - a. Busyness of the centre
 - b. Legal matter type
 - c. Client aggression
 - d. Other factors (ask people to say what they are and see if other people agree)
 - e. None of the above
3. What's the biggest change for the better that's occurred for you when doing intakes, as a result of the changes within the centre?
4. Have there been any changes that have had negative effects?
5. With the benefit of hindsight, is there anything about the process used to implement the changes that could have been better?
6. What effects have the changes had on your job satisfaction? What's the main reason for your answer?

Ask **lawyers** to reflect on the following questions before the meeting:

1. On a scale of 1-5 (1 = no impact , 5 high impact), what impact have the changes had on your confidence that intakes have accurately assessed:
 - a. Urgency
 - b. Suitability for assistance by the centre
 - c. Area of law
 - d. Client vulnerability
2. A number of changes and tools have been implemented in the centre to support intake processes. What effect have these had on your confidence in the accuracy of intake assessments for particular client cohorts or legal matter types? What external factors do you think affect this?
3. In your work as a lawyer, what's the biggest change for the better that's occurred, as a result of the changes within the centre?
4. Have there been any changes that have had negative effects?
5. With the benefit of hindsight, is there anything about the process used to implement the changes that could have been better?
6. What effects have the changes had on your job satisfaction? What's the main reason for your answer?

2. At the meeting

- Establish agreement about how the group will work together to share responsibility for giving everyone a chance to contribute and be heard
- Remind people the day is about learning, needs to be a safe space, and that creating a safe space is dependent on how everyone works together

Confidence in intakes

Facilitator: Ask four rounds of questions of **intake workers** based on the questions sent ahead of time. Again, consider whether to do this as show of fingers, or more anonymous methods like post-it notes or an online poll.

On a scale of 1-5 (1 = no impact , 5 high impact), what impact have the changes had on your confidence in completing intakes that accurately assess:

- a. Urgency
- b. Suitability for assistance by the centre
- c. Area of law
- d. Client vulnerability

Note taker: record response for each dimension of intakes

Facilitator: Ask four rounds of questions of **lawyers** based on the question sent ahead of time

On a scale of 1-5 (1 = no impact , 5 high impact), what impact have the changes had on your confidence that intakes have accurately assessed:

- a. Urgency
- b. Suitability for assistance by the centre
- c. Area of law
- d. Client vulnerability

Note taker: record responses

Facilitator make an observation about whether there's a convergence or divergence between what the two different teams said.

Biggest change

Facilitator

Divide group into small groups, mixing intake workers and lawyers

Ask each group to discuss:

- what's the biggest change for the better that's occurred for you, as a result of the changes within the centre?
- have there been any changes that have had negative effects – what were they?
- what impact have the changes had on the accuracy of intakes in the context of external factors such as busyness of the centre, legal matter type, client aggression or other factors (ask people to identify other factors)
- with the benefit of hindsight, is there anything about the process used to implement the changes that could have been better?
- ask the group to record their answers and nominate a spokesperson to report back, on the basis they don't identify individual answers.

Facilitator – hear from each group, reflect on differences and similarities in answers, invite people to elaborate if they wish to. If there is a lot of divergence in views, be ready to outline additional steps that may be needed to continue learning and improving.

Note taker – make notes

3. After the meeting

1. Undertake to prepare a write up of the day
2. Consider whether additional steps are needed depending on how positive or negative feedback has been
3. Circulate write up for people to look at
4. Invite discussion at a subsequent team meeting – based on what we heard and read:
 - a. What's been the most positive change in the centre?
 - b. Where do we need to keep focusing our efforts to do better?
 - c. What would we do differently before we embark on another change?