

WEDNESDAY, 22 MAY 2024



CLASS Transition – Victorian Approach

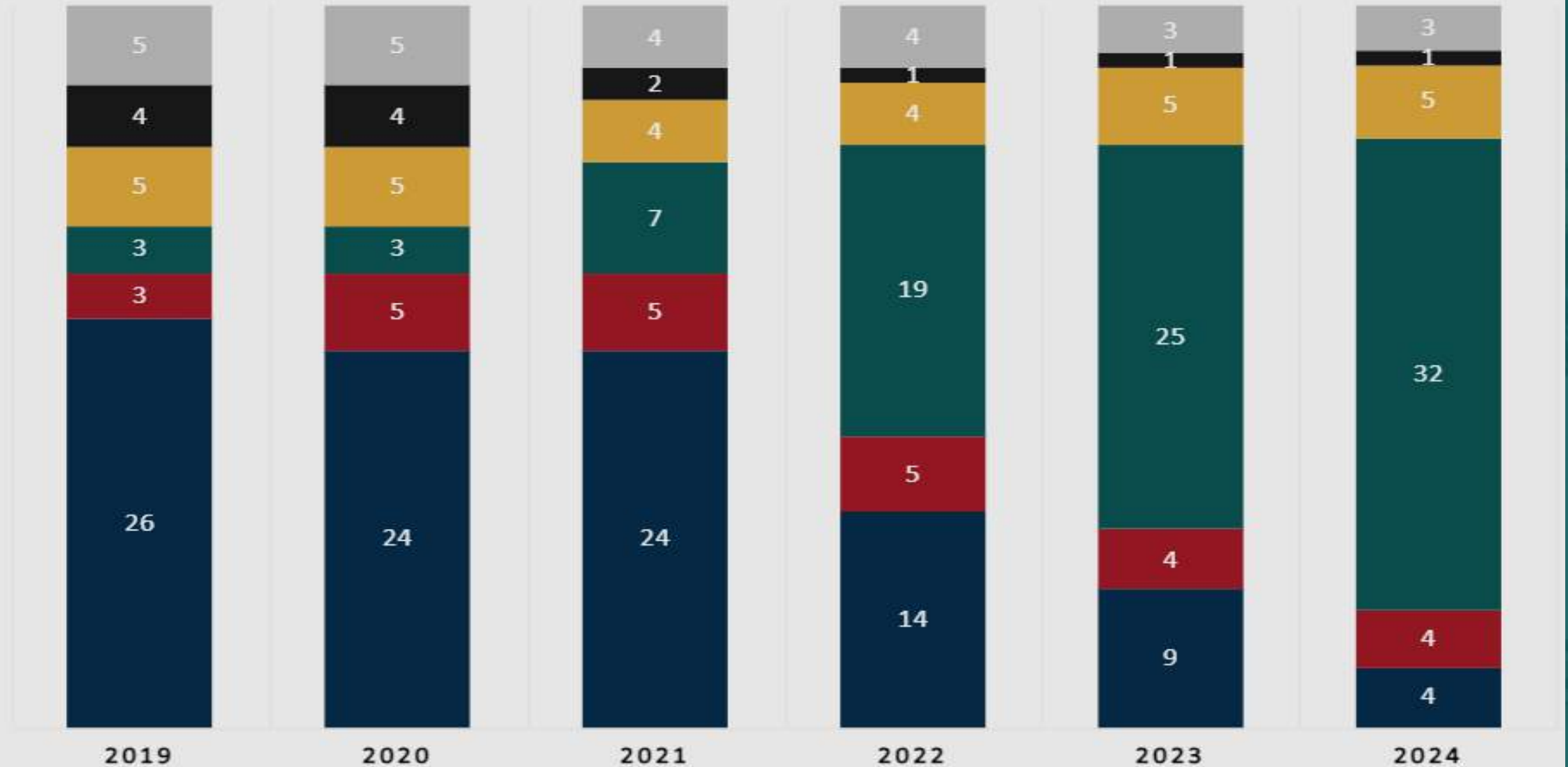
SKYE FORSTER (IMPLEMENTATION ANALYST)



**WOI WURRUNG COUNTRY
UNCEDD WURUNDJERI LAND**

VIC CLC CMS USAGE

■ CLASS ■ CLASS/AS ■ Actionstep ■ Other ■ None ■ Unknown



BACKGROUND

- Continuum of Federation investment in building data capacity across the sector
- 2016-2017 [Outcomes Measurement Framework](#) codesign
- 2017-2019 [Data Standards Project](#) and resulting [Data Consistency guide](#) to supplement CLCs Australia materials and training
- The [impacts of Covid-19](#) in Victoria, and particularly Melbourne metro, made existing need for modern systems mission critical
- 2020 - 2021 identified need and secured funding for [Data Project](#)
- 2022 - 2024 Data System Implementation Project supports:
 - 22 Victorian CLCs to implement new modern system and migrate from CLASS
 - 7 'legacy' centres to align custom modern systems to national data model
 - 38 member CLCs engaging in a CLC Data Community of Practice (open to all)

DATA SYSTEM IMPLEMENTATION PROJECT

- Data Project Manager recruited early 2021
- RFQ conducted in mid-2021 to identify viable products (Actionstep and CSNet)
- Initial EOI process to identify participating member CLCs
- Project kickoff and recruitment of implementation support expert
- Community of Practice convened (83 members from 35 CLCs)
- Second EOI process for additional participants based on funds available
- New implementations March 2022 through mid-2024 (up to \$15k per CLC)
- Legacy alignment work partially complete (some awaiting final NDR specs to decide on approach)



SECTOR IMPLEMENTATION REFLECTIONS

Challenges

Wins

Lessons to share

Hurdles



- Learning a new language and architecture
- Unlearning old habits
- Resourcing and being realistic (keep it simple)
- Lack of centralised reporting interface (in development)
- Difficulty integrating shared Outlook calendars
- No bulk deletion option or address picker (yet)



Wins

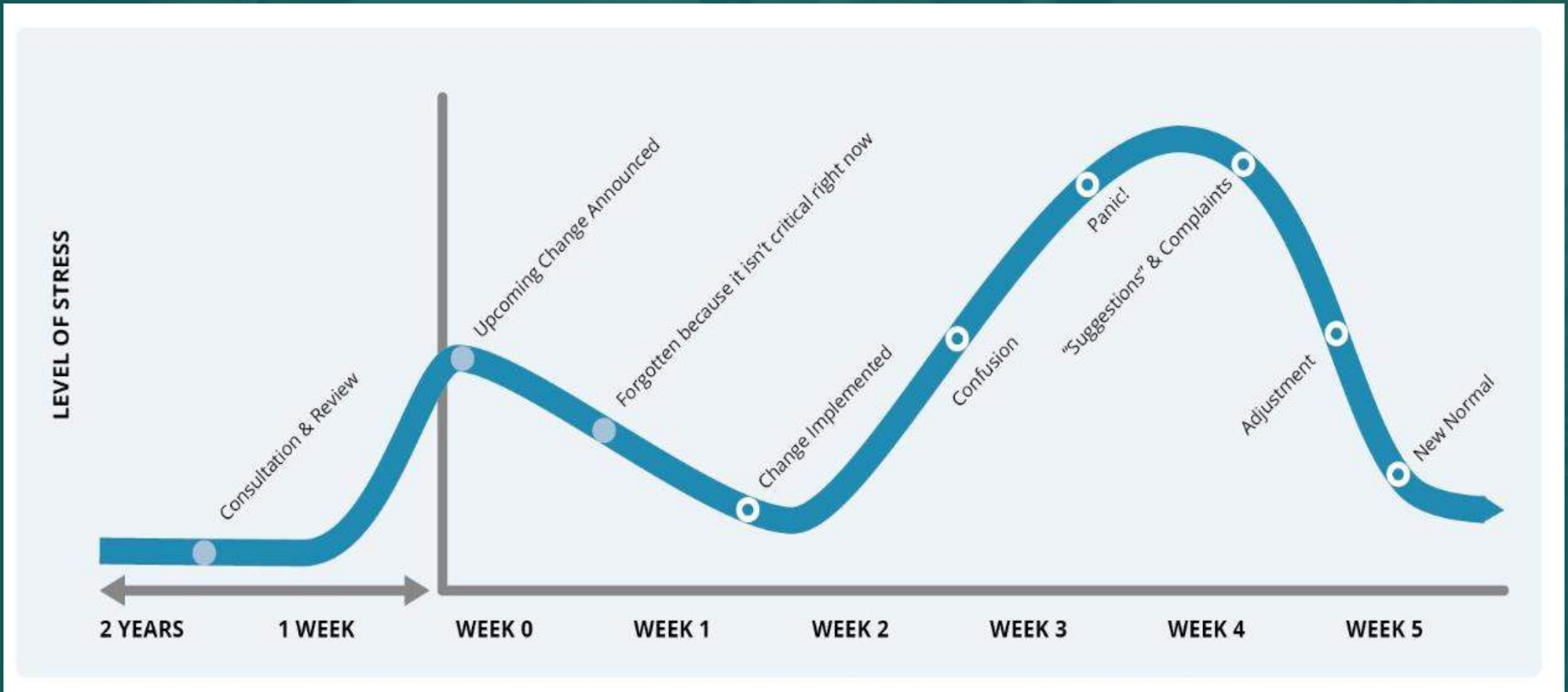
- Integration with other systems and tools
- Useful functions
- Simplified oversight
- Compliance enforcement
- Building in internal priorities
- Practice management uses (eg HR, trust accounting)
- Meaningful data insights and storytelling
- Actionstep development influence

Top Tips

- Appoint a project team and consult as appropriate – this is NOT an admin or IT project, it's not just about reporting, it's not “New CLASS”. This change requires senior leadership, and engagement at all levels
- Collaborate - Jurisdictional/cohort, generalist/specialist, funder/program, connect and share what you learn
- Start simple, continuously improve
- Identify existing pain points and eliminate/mitigate
- Only import what you need and/or is meaningful
- Understand the security options and risks
- For quick start enhancements use what other CLCs have designed i.e. the Critical Dates and Case Summary add-ins and Impacting Factors field
- Use this change as a Trojan horse – be ambitious – but **keep it simple!**



Change Management Stress Rollercoaster



Resources to share

Most of these are related directly to Actionstep however some (indicated with an asterisk) are relevant to any modern case management system.

- Skye's [For Sharing](#) folder but particularly:
 - *Overview of NLAP requirements and how these are applied within Actionstep ([Video](#) and [slides](#))
 - General template change [guidance note](#)
 - *Client Pathway model [template](#) (Visio file)
 - Implementation project plan [template](#)
 - Service grouping/mapping [template](#)
 - [Critical Dates](#) data collection add-in (remember to modify for your needs)
 - *[Case Summary](#) data collection add-in (adapt to centre priorities)
 - *Common [Workflow examples](#)
 - Actionstep [induction list](#) for users (with thanks to VALS)
- Actionstep [Youtube](#) channel and [Help Centre](#)



OPEN DISCUSSION

THANK YOU

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*Community Legal Centres are
the heart of a movement for justice.*

