Episode 30

Disability Done Different: Business Case Investigations

Believing in people with Kate Fulton of Avivo

Podcast transcript

Hosts: Roland Naufal & Sally Coddington

Guest: Kate Fulton

Start of Audio

Roland Naufal
Welcome to Disability Done Different and this time it's different. I'm Roland Naufal and my co-host for this special series of three episodes is Sally Coddington. We've got a cheesy sort of film, private investigator type theme going, and we're doing Business Case Investigations. We're looking at services and particularly people that are thinking differently, that are taking the sector in places that are interesting, that are profitable, hence the Business Case Investigation piece, and that we think you'll find highly enlightening. Enjoy.

Female Voice
Business Case Investigations, brought to you by DSC.
Episode 1 – Believing in people. The case under investigation today is a real doozy. Roland and Sally, your case, if you choose to open it, is to interview Kate Fulton of Avivo on the following brief. Is it possible to run a successful NDIS business where the focus is supporting staff to be their best selves at work? Do you accept this assignment?

Roland Naufal
Can't wait.

Sally Coddington
Yes PLEASE. I've had Kate under surveillance for a while. I'm really looking forward to learning more about how she makes it happen.

Roland Naufal
Hi Kate, thanks so much for agreeing to be part of our Business Case Investigation. It's really quite exciting to have you on, but let's talk about you before we talk about our issues. Can you tell us a little bit about Avivo?

Kate Fulton

Yeah, Avivo is based in Western Australia and has been around for about 50 years, it's got a really interesting history. We currently support people with a disability, people who experience mental ill-health and older people.

Roland Naufal

And a bunch of people told us we've got to talk to Avivo, that you guys are really doing some interesting stuff. What do you reckon they wanted us to, you know, why did they pick you, why are they telling us to see Avivo?

Kate Fulton

Other than my mates, other than that, probably the things that people seem to be a bit interested in, what we're exploring at the minute is teams. So how teams can work both as a kind of support mechanism, but also how teams work to develop ourselves. Probably the other areas may be to do with we're very focused on individual development and its relationship with teams.

Sally Coddington

I'm interested Kate in this journey that you've taken exploring teams. And I understand that the place that you started is a long way from where you now find yourself with teams. Can you tell us a little bit about that?

Kate Fulton

Yeah, so Avivo has always kind of philosophically, always been focused on the citizenship of the people that we support and the families that we're connected to. And about four or five years ago, we asked the question of our colleagues, what does it take to be your best self at work? I'm a bit embarrassed about that question now, because I probably would have asked a different one, but basically what came out of that was that people were telling us, our colleagues were telling us, I really want to be connected, I really want to have meaning and purpose, I want to have a local impact, and I want to be able to grow and develop.

So it turns out it's the same stuff. So if that's what's important to our colleagues, we started to look for what are some of the, almost like the kind of operation models options that we have, but that would enhance some of that or advance them. So we looked at teams, that makes sense for people who are saying they're pretty disconnected, so the notion of teams, geographical teams were really important.

Roland Naufal

One of the most exciting things when Sally said she wanted to talk to you Kate for me was that she was able to drop some names of theories and people and places that you were inspired from and they were Decurion, Buurtzorg, Inspiral, is that right?

Kate Fulton

Inspiral.

Roland Naufal

Inspiral. Can you tell us a bit about, you know, what you've been doing and how you've been gathering these ideas?

Kate Fulton

Yeah, so I think we've been really lucky that when we've started to explore a particular approach, we found organisations globally who may be further ahead in that exploration. Who have just been so willing to connect and share and give their advice on what not to do. So Buurtzorg was one of them,

like you say that's probably well known to people. Decurion is an organisation based in the States that actually has a whole host of different services, including cinemas, real estate. Inspiral is a collective that's based in New Zealand that is, I suppose you'd probably call it a participatory organisation, so it has no hierarchy. So these organisations and others, you know, there's the Belgium Ministry of Social Security, they've been amazing. It's like being able to look outside of the sector has given us some examples that we can see are really useful to how we do business and how we organise our business.

Sally Coddington
So would you say that what you have designed has really pulled a little bit from each of those?

Kate Fulton
Yeah. I'd say that we've learned from them, but then had to do our own thing based on, so sometimes people will ask us are we a version of Buurtzorg? Definitely not, like you won't see Buurtzorg in the way that we operate, but we've definitely learned from some of their examples around personal autonomy, self-management and team structure. But then equally Decurion the thing that we, in the early days what we learned was that you can increase, I can increase my own autonomy, but alongside that, I also need to understand my impact on my colleagues and people that I support.

So Decurion was really helpful in the kind of puzzle about our own development and they have a philosophy around deliberate development, which was just when we looked at how that's actually operationalised was just fantastic. It was kind of, you can't grow yourself unless it's in community, like in connection with others. So that's really helped us understand what does it take for me to be in a team? What does it take for teams to operate? They're not in isolation, I suppose that's probably the thing we've learned.

Roland Naufal
So the question we're seeking the answers to and is there a business case in it is how do we, if you were starting fresh or if you're giving advice to someone that's greenfield's, that doesn't have a bunch of problems about an existing organisation, how do you build effective teams without a whole lot of back office support in this new world where we can't afford a whole lot of back office support? That's the question we want to investigate isn't it Sal?

Sally Coddington
Yeah, that's right. And also, how do you maintain high quality at the same time as minimal infrastructure?

Roland Naufal
So just three to five points, if you could be that brief?

Kate Fulton
Okay. So building teams, what we've learned is in the early days, we thought we'd just put teams together and hope for the best, that didn't work. And we've learned that teams need support to become a team. So it wasn't particularly expensive, but we do have a development program that teams go through that help them establish a team agreement, that kind of is really kind of practical. It's like, how are we going to get on, how are we going to work together, how are we going to figure out problems together and that stuff has been incredibly helpful, so without that.

Roland Naufal
Running in-house development program, team development program?

Kate Fulton
Yeah. All of our teams go through the development program. All of our teams produce a team agreement.

Roland Naufal
And you don't bring in some all singing, all dancing HR consultant to do it?

Kate Fulton
No. It's funny, that's something that we've learned. So we've had the consultants in and out, and we hit a point actually where we were like, actually, this is our organisation. And you know I have to hold my hand up, I've been a consultant for years and what we experienced was you'd get the next consultants ideas and it was not, it wasn't coherent. So we made the decision that it's our organisation and we need to figure out the problems ourselves. And actually we've got the solutions and I'm not talking about me, but within my colleagues we've got the solutions it's just taking the time to figure it out.

Sally Coddington
I'm really interested in the way that you continually refer to what you've learned. It sounds to me like reflective practices are a really important part of your transformation process. And I think that interests me because I'm very interested in this new paradigm on organisational strategy that goes from that, you know, strategic planning document and the Gantt charts, etcetera to something that's more emerging or developmental. It sounds to me like part of the reason why you find yourself in such a different place than you started is because you've really reflected on what you've learned and changed course as you went?

Kate Fulton
Yeah. It's interesting that whole paradigm, isn't it? What I think I have learned is we did go down the route of, we don't know how to do what it is we're trying to do, and it wasn't develop teams, it was the whole picture. So we want to create an organisation that helps people be active citizens and change our world. Like that's, yeah, it's bigger than be a good organisation. We are a good organisation, but the thing that I think we learned was this, to be emerging or to have the strategy that emerges takes a totally different kind of leadership, which honestly has been really challenging.

So my understanding of leadership, you know, I've been brought up on leadership theory that says, I'm supposed to stand out front, show a little bit about myself, you know, be a bit vulnerable, develop a strategy, help people feel safe. And actually, the whole kind of emergent theory is the complete opposite. So it's you, you're standing out front saying, we don't know, we don't know how that's going to look, but we reckon we can figure it out, and one of the things we really held on to was when we were developing teams, all of the kind of rest of the organisation infrastructure was saying, well, what do we look like? What do we look like? And we really held on to, we don't know, but the teams are going to teach us. The teams will tell us what they need to be able to deliver really good supports. And that was really tough for people who are looking for a blueprint, you know, who are saying, they want to know what the next steps look like. So yeah, I think the emergent theory is really helpful. I think it's definitely taken us in a different place than it would have if we'd had a kind of, this is the strategy, but I definitely think it asks something different of you as a leader and of colleagues really because you, yeah, it's different.

Roland Naufal
Kate, what I'm hearing when you're speaking, it's really fascinating because you're saying you really want to learn from other people and learn from the outside world. We don't know what the answers are and we've got to do what's right for our organisation in a world where it's difficult to plan going

forward. So you've got this bunch of complexity going on, you're learning, but you acknowledge that it has to be adapted to your situation. It has to be adapted to your situation when you don't know, you know, what the answers are and when a lot of the traditional things where your back of house is even saying to you, give us the answers and you're saying, no, that'll emerge. In some ways your role as a leader is holding those forces back, isn't it and just keeping the space open enough. Does that make sense in a question?

Kate Fulton
Yeah, it definitely makes sense. And I suppose that's why I'm saying really Roland it's challenging. If one of the things I'd say is I think traditional hierarchical management is way easier than the experience I've just had over the last six, seven years. Yeah.

Roland Naufal
It's not as likely to be successful is it in meeting human being needs?

Kate Fulton
Well, that's not been my experience, so I'll give you an example. One of the things we said at the beginning, one of the things we tested out really was what will our community teams do? So there was a whole load of tasks, what the community teams will do and won't do. And we worked with people that we support the teams and that kind of list of do's and don'ts, it went from being like a mile long to three bullet points, a mile long to three bullet points. And I suppose, where we've landed is the stuff that the teams do add value, it isn't what the organisation thinks it should do. Does that make sense? So it's like we've had to go through an experience to land at, this is the thing that makes sense. So if you look at Buurtzorg teams for example, there's loads of stuff that they do that typically a back office function may do or a manager might do, but that didn't make sense for us. When we tried some of this, you know, we've learned that that wasn't the way to go and we needed to change and adapt. We do lots of events called 'Stop and Learns' where we come together and I look forward to them and I also dread them because we come together, a whole bunch of us and share warts and all, what's happening, what are we learning, and some of that's pretty painful. You know it's pretty painful to think, oh, well how to hypothesis and that worked out to not be the case, but there's no doubt about this it has absolutely helped us get close. I mean we are not perfect by any stretch of the imagination, but it's helped us get closer to that makes sense. This is what adds value to the person and their family. That bit doesn't make sense. It might administratively make sense to the organisation, but actually that family don't care about that bit.

Roland Naufal
So the way you're describing your role as a leader Kate is one essentially dangerous to me, it sounds like you're holding these forces at bay and you're telling the folks at head office and the bean counters and the boards just be patient, we don't have the answers and they're saying well we need some answers. And the frontline staff who are used to being told what to do are saying, tell us what to do, not all of them, but some of them. And so you have to, as a leader, as you said, it's quite difficult to hold those forces at bay. I imagine a huge amount of what you're talking about is trust. Trust me, we're going to get there. You've been doing it, did you say seven years?

Kate Fulton
Yeah. I mean, yeah. I've been at Avivo for eight years, and I'd say that we've been exploring and thinking and working on how do we create an organisation that helps all of us be our best for years.

Roland Naufal

But so then the trust piece, does that make sense to you that trust is such an important part of it and it's difficult to have everybody on board with trusting you and trusting each other, and trust is a pretty fragile thing. Am I on the right track?

Kate Fulton
Yeah. I mean, I think the culture of your organisation is really critical. Like I think trust is a really interesting topic isn't it? If we all could figure out how you do that, how you get people to trust you. I think yeah, we'd be pretty rich, but one of the things that's probably where it links with the whole leadership stuff, that actually I can stand in front of a room and pretend I know what we're doing. And I can stand in front of a room and pretend I know exactly how it's going to pan out, what everybody's going to do, I don't think that generates trust. I think being honest about what we do know, being honest about the bottom lines is really important. I think teams feel enabled to say this doesn't work, this doesn't make sense, has been really important, and that's probably Roland what I was getting at about it is challenging, it's really hard to sit in a room, support workers and the CEO, and say that bit, your idea didn't work. Like you've got to have a culture that's able to really challenge that, and I don't know if you see that everywhere. I can't talk for all other organisations, but I think the whole kind of building of trust in teams, building of trust where there isn't a manager, who's saying this is what you will do, this is what you won't do, I think trust is a massive topic, a massive issue, really important.

Sally Coddington
I think a really important element of trust is transparency, and so then I want to talk a little bit about congruency. And there's a couple of areas that I came into this conversation knowing that there is congruency between how you treat your people and how you expect them to treat clients. But I think I've learned just listening to you that there's also congruency in the fact that in your transformation, you took direction from the teams just as you expect your teams to take direction from the people that they support. And I think that that congruency is really it's a foundation for trust, but if I see that you are living from your values consistently, then I can trust where you're coming from.

Kate Fulton
Its interesting Sal. One of the things that I think has been a bit of a consequence with the NDIS or schemes like them, we work across a number of sectors is the kind of you can and you can't, you know, you will and you won't, in terms of what you can use with funding. And one of the things I love about Avivo's culture in relation to supporting people and families, the answer is often, 'it depends', like it depends, you know, it depends on what makes sense for this family. It depends on what makes sense in terms of what they're trying to achieve. It depends, and sometimes you know, you go against the rules, sometimes you kind of go under the rules, like it depends. So you're absolutely right, it's no different to, well should a team I don't know, do this. Well, it depends. Our teams do really different things in regional Western Australia than what they might do in the Metro areas, because it depends. We've got a team in Carnarvon which is up in the coral coast, they do loads of things that some of our Metro teams don't do, that's because it makes sense. They're members of their own community, they are the only infrastructure really, we're in Perth so of course it makes sense you know, it depends.

So I think you're right about that congruency, but that world of living in 'it depends' doesn't suit everybody, and I suppose that's probably one of the things in this journey that I've seen, if you are somebody who loves the black and white, you love the rules, you know, what's in and out of NDIS, can I buy an iPad or can I not. And if you're the person that just wants the answer yes or no, this is probably not the best environment for you to work in. This is probably not the best organisation for you to work in because it's complex. And it takes a level of responsibility and probably maturity really to live with that level of complexity. The other thing that I think, and I haven't got a good philosophy or a theory to add this to right, but the other thing I think we've learned a lot about is the kind of adult to adult relationships in an organisation. So in many organisations in my history anyway, in many

organisations the kind of senior people or the managers take on a kind of parental role, it's like, you know, we won't let the people, it links to the transparency, we won't let the people know the real situation because we don't want to worry them or we don't want to, we've done a lot of work on what it means to have adult to adult relationships in an organisation and I think that adds to the complexity. So you know understanding the finances of an organisation, understanding some of the complexity and decision-making, I think we have tried to be really transparent about that and we have tried to yeah, it's not my job to be your mum. My job is to take my responsibilities seriously, but to also be honest about you and your responsibilities.

Sally Coddington
That also comes back as well to your expectations that people manage themselves, so self-management, so you treat people like adults and you have adult expectations of them to manage themselves?

Kate Fulton
And I would say that's definitely one of the areas. So it's one thing doing team development, there's another doing self-management development, for want of a better word, I don't even know what the right term is, self-regulation I don't know. So we are learning quite a bit about what does that really mean for me to manage my own workload, for me to manage and understand my impact on other people. And that's like lifelong work, you know, that's not your common 'we do a development course' and we've got it all sorted, that is lifelong stuff you know, I'm working on my impact and regulation all the time, you know, and I get it wrong a lot of the time. And that's the bit about you can't really develop yourself without other people, you know, you need other people to understand your own development. So yeah, but that's exactly the same as what I was taught when I was 17 as a support worker that actually me turning up to support somebody in a bad mood is going to have its own impact. You know what do you think that impact is? So it's the same stuff it's just, I don't know, they've just got different clothes on or it's a different, but yeah, I think it's really congruent. It depends how you talk about it.

Sally Coddington
And the transformation process is also an ongoing journey. And I think that that's, you know, rather than it being a destination, Oh, we've transformed, we've reached there. It's an ongoing journey. And I feel talking to you, like I'm doing a lot of zooming in and zooming out, and what I'm seeing when I zoom in and when I zoom out is very consistent. It's just an interesting observation I think from my perspective.

Kate Fulton
Okay. One of the things I think I'm certainly clear on now than what I was a few years ago, people will ask me about self-management and I think you and I Sally had this conversation where I'd say stop being so obsessed with self-management, like it might well be the new thing in the sector or in the world, it is just one tiny part of the whole picture for us. So we'll go back to, why are we doing this? We're doing it because support workers told us they were really isolated, support workers told us they wanted a place to be able to grow, they wanted to contribute to something bigger than themselves and it needed to have some relationship to the broader world. Whether you call that the community or, so it's like we're trying things that we think affect that, it's not like, oh, well self-management is a good way to cut down back office costs. I honestly think don't bother if that's what you're doing it for, don't bother because it won't make sense, yeah, it's totally and congruent with our experience anyway, it would be pretty disastrous I'd say.

Sally Coddington
So to implement teams solely for reducing back-office costs do you think would be futile?

Kate Fulton
I think it would be really painful and I wonder, you know we're a big organisation so I wonder whether you would really get hearts and minds invested in that. Now, I'm not saying the money doesn't matter, because we'll talk to our teams about, would you rather us, we had a conversation recently, would you rather us spend 80 grand on an office space or is there another way to use that money? They have a perspective on it that's incredibly valid, you know, so the money matters and it matters to everybody that works here. But I think that being the 'why' or that being the purpose, I think is pretty empty. You know most support workers I talk to want to do a brilliant job, they want to do a brilliant job and they want to be connected to people. So I think, yeah, I think it would, I don't know if it would hold up with what you're asking people to do the whole kind of self growth that people need to go through, I just don't know if it would hold up if actually all it comes down to is we can save a bit more on HR or we can save a bit on, yeah.

Roland Naufal
It's the wrong messaging isn't it. It's not the direction you want to be telling people you're going. So if we were trying to sum up and maybe all three of us can have a go at this, what are we hearing from Kate, what's Kate telling us are the key approaches. Do you want to do it Kate?

Kate Fulton
What do I think are the key approaches? Probably get really clear on 'why', why you're doing what you're doing? And does that make sense to your colleagues? Is it their 'why'?

Roland Naufal
I can think of one of Sals which was, and now that's congruent as a leader, it's congruent with staff, it's congruent with the people with whom you work. And so, and what do you mean by congruent Sal?

Sally Coddington
Well, I don't really know. I don't know what's driving it. I suspect it's just authenticity and that it just naturally happens when you're coming from an authentic place.

Roland Naufal
So authentic?

Sally Coddington
I feel like that brings in a whole level of bull shit into the conversation.

Roland Naufal
My understanding of frontline workers is they sniff bull shit quicker than anybody else I've ever met, but be congruent in what you're doing, be authentic in what you're doing, be prepared to learn from others. But one thing I've heard from you a lot Kate and other times I've spoken to you, is there's no external template that's going to fit what we're going to do, but there's no external template that's going to fit a team in Karratha as opposed to a team in Osborne Park. So there's no templates?

Sally Coddington
Yeah

Kate Fulton
That's right.

Roland Naufal

But there are some guiding principles. What we're trying to tease out is, you know what's going to give you your best chances of success?

Kate Fulton
It depends, I think is an important phrase, that has emerged.

Roland Naufal
And it's difficult. Its okay to keep saying it's difficult. Don't expect, this is not the easy way where you just hand it off to the teams and then you're investing a lot in both in-house, you're looking for external learnings, but in-house solutions if that makes sense.

Kate Fulton
Yeah. How do we make sense of this? That's what our kind of 'Stop and Learns' do. How do we make sense of this thing that we've learned? Sometimes it is external, sometimes it's internal, but how do we make sense of it? How do we, the Avivo community make sense of it? You know the other thing I'd probably say Roland is, the thing about the teams, it's really hard to work as a team where you have to take personal responsibility. That means sometimes saying to you Roland, I don't like the way that you do that thing, that's really hard to do. And I don't care where you are in an organisation, where you are in the world, whether you're the CEO or I don't know, you are the administrator, it's a hard thing to do and sometimes you choose the battle that makes sense to you. And I think the thing that we've really learned is people need some support with that. Don't just assume it's going to happen. You know just because we're now self-managed, suddenly I'm going to be the best, I don't know, negotiator in the world, it just has not been the experience. So give teams support to figure out how to be a team.

Roland Naufal
So my final question and it may come across as a negative frame so maybe Sal can fix it with a better final question, but my final question is, in this world of increasing compliance and a whole lot of new rules and regulations and the expectations that you do billable hours and things fit nicely into boxes, your model doesn't fit real well does it?

Kate Fulton
No, but I love that you've even made that comment, right. So I think you're absolutely right. Yep, in the world of increased compliance, I think it's really important that organisations hang on to who it is they want to be because it's really easy to become an organisation that is purely compliant. And I wonder about what kind of outcomes they'll generate in partnership with people and families. So I reckon we need to be compliant, but we also need to be us.

Roland Naufal
Kate, the role of self confidence in what you're doing, I imagine you're a fairly self-confident person. I mean you're probably going to deny it, but I don't think you can hold this level of complexity and this level of difficulty with so many different stakeholders without having a fair amount of confidence that what you're doing is vaguely the right thing?

Kate Fulton
It's a really interesting question. I absolutely believe in people, right, so I believe in people. Am I confident, I honestly Roland, no jokes aside, this has been one of the hardest things I've ever done. I would rather have worked with the British Department of Health to get individual budgets over the line, and I'll tell you that wasn't easy than actually really create change that you believe is going to make a difference. But I absolutely know that the majority of people I work with are brilliant people who want to do a really good thing and want a good outcome, so I believe in that.

Roland Naufal

Do you remember the question now?

Sally Coddington

Nah, I want to start crying because I want to say this has been really hard.

Roland Naufal

Confidence is a question Kate? The question is about confidence?

Kate Fulton

I don't know. Be careful though it's not about, no I think I spend most of my nights shitting myself thinking, what the hell, like is this okay, does that make sense?

Roland Naufal

Yeah it does. But you still have to have an underlying level of confidence to get up the next morning and give it a burl as opposed to going to work for Department of Health and Human Services?

Kate Fulton

Yeah, that's true. Fair enough.

Female Voice

So Sally and Roland, do we have a Business Case?

Roland Naufal

I recon it's an open and shut one, don't you Sal?

Sally Coddington

This case really had me thinking but I would have to say, over all, it's a yes.

Roland Naufal

Our BS detectors are pretty strong Sal, we've been in the industry long enough and what we kept hearing from Kate is this really strong congruence. And I love it when people say, I don't know, I love it when people say, you know we don't really have answers for other people, we're really struggling to get the answers for ourselves. And all of a sudden this starts to really say to me, this person is real and I liked her sense of being focusing on connection, on purpose, on impact and on growth and development, but not just for the people they work with but for staff as well, for me that gives, you know, five stars, big tick Business Case absolutely.

Sally Coddington

Yeah. And in terms of like a key takeaway for the way business strategy can be done differently, that kind of one step at a time, reflective practice, being comfortable with identifying things that don't work, but just learning from it every step of the way.

Roland Naufal

And one of the dominant themes that comes out in this case and all the clues pointed to it was that you never get there and it's this constant change, you never actually get where you're going do you Sal?

Sally Coddington

No, that's right. So there is no destination and I think that when you reflect on the context that we're all operating in, which is the NDIS, it is again very congruent with that context. The NDIS is constantly changing and so as organisations to think that there will be a destination in our business strategy is really just denial.

Roland Naufal
And Kate helps us realise that if you're that leader that's looking to, you know get to Christmas and sit down at Christmas and toast your great successes and things are pretty much done, this is not the place for you to be.

Sally Coddington
Totally.

Roland Naufal
So yes!

Sally Coddington
We do have a successful Business Case.