

# CRM Fidelity Study

Part One: CRM Learning Experiences Report

2014

## Acknowledgments

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Many thanks to the staff and consumers who contributed their experiences and feedback towards the CRM Fidelity Study.

## Contact us

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## Introduction

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Early this year Neami National (NN) initiated a research project titled “An Exploration of the Application of the Collaborative Recovery Model (CRM) within Neami National. The aim of the project was to:

- Assess whether the CRM is being implemented as intended,
- Provide an opportunity for staff and consumers to contribute input as to what is working and what could be improved when it comes to utilising the CRM as a service delivery framework,
- Utilise input from staff, consumers, training data, Carelink data and consumer file data to inform change management/implementation strategies that will enhance service delivery practices.

## Process

In order to gain a comprehensive understanding of the challenges and opportunities that support fidelity to the model, the research was designed to gather input and feedback from a diverse spread of perspectives and implementation evidence. This included drawing on the knowledge and experiences of consumers and staff through a mix of face to face surveys and brief interviews, *an online survey* with service delivery staff, and in-depth interviews with staff from a variety of roles across the organisation.

This report presents results from the online survey.

## Online Survey

In June this year, NN staff shared their views and experiences of using the CRM in their work role through the completion of an online survey. Two hundred and twenty two staff across Outreach, Homelessness, Sub-Acute, Peer, Arts and PIR roles contributed; with 174 of these being from direct service delivery roles and 48 from service delivery management roles. Staff respondent demographics demonstrate a reasonable representation of service delivery staff across NN at the time the survey was completed. Demographics of who responded are presented in the appendix at the conclusion of this report.

The online survey included 5 parts:

- Part 1. Learning Experiences**
- Part 2. CRM Implementation
- Part 3. LifeJet Protocol Reflections
- Part 4. Attitudes to Risk and Recovery
- Part 5. Staff Wellbeing

This report presents the results obtained from Part One of the online survey; Learning Experiences. It includes a brief context and discussion, and preliminary ideas towards implementation and service development recommendations.

## Online Staff Survey – Part 1. Learning Experiences

The following results were obtained from part one of the online staff survey. In part one, we asked staff to rate a range of learning experiences for how they contributed to their competence and confidence to use the CRM effectively in their work practice. The results include ratings for the following learning experiences;

- 1) *Formal Learning* - Coach and Flourish CRM induction and booster training workshops,
- 2) *Semi-Formal Learning* - Supervision and Coaching Sessions with manager or other, and
- 3) *Informal Learning* - opportunities initiated by individuals and teams i.e. Team discussions, completing your own LifeJet protocols and coaching others using the LifeJet protocols.

To complement these results we have included data obtained from surveys completed between, February 2011 to December 2013, by NN staff, post attendance at CRM training workshop events.

### How did you rate the following Learning Experiences for assisting you in using CRM?

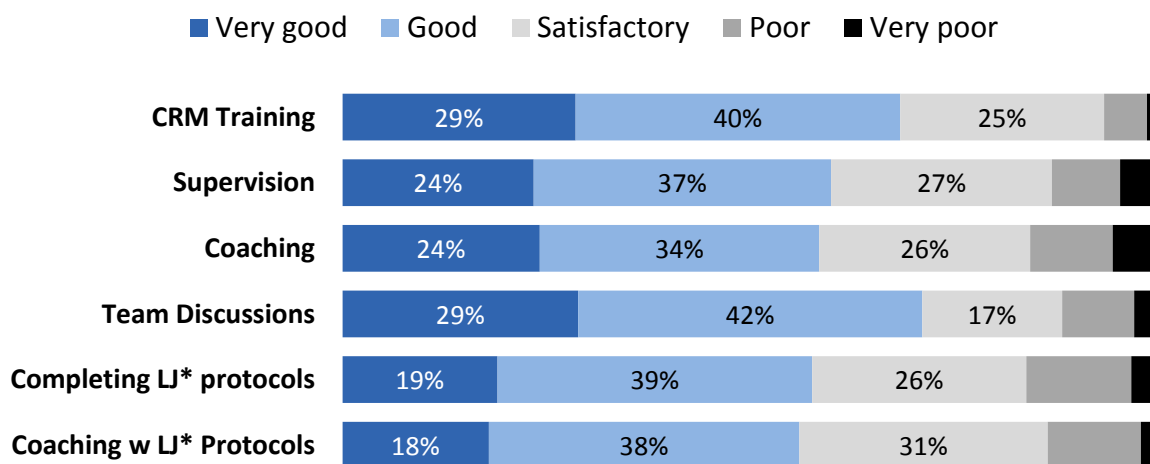


Figure 1. Percentage frequency ratings by which staff rated a range of Learning Experiences. LJ\* refers to LifeJet Protocols i.e. Good Life Album, Camera, Compass, Map and Decisional Balance.

These results indicate, that in addition to valuing formal CRM training workshops, staff value a range of learning experiences as contributing towards their confidence and competence to use the CRM effectively in their work practice. Around 60-70% of staff rate the above learning experiences in the good to very good range as assisting their CRM practice development. Team discussions were particularly valued by staff.

*“ I think the introduction of CRM has in some way contributed to the retention of staff... having conversations more specifically about their development has meant (staff) feel more valued, and engage with the meaning of the work a little more” (anonymous comment – from online CRM survey).*

## CRM Training

For this report we have included quantitative and qualitative data gathered from staff after attending CRM Coach and Flourish training workshops (Induction and Boosters) across NN, between February 2011 and December 2013. Staff rated their knowledge and confidence before and after training. Data from over 750 participants indicated a statistically significant increase in both knowledge and confidence for staff following CRM training events.

Table 1. Mean ratings post CRM training February 2011 to December 2013

	Knowledge		Confidence	
	Before Training	After Training	Before Training	After Training
N	761	762	750	761
Mean	3.1	4.01	3.07	3.95

*Note: 1 = Poor 2 = Below average 3= Average 4 = Above average 5 = Excellent*

Feedback from staff when asked about their confidence upon completing formal CRM training demonstrates that staff recognise the need to access ongoing opportunities for learning.

*"I am confident, but I feel as though the more I practise the better I will become at developing the new skills I have learnt."*

*"Not as confident as I would like to be just yet, but that is purely a lack of experience, being able to attempt these skills in the safe environment of the class was a good start though."*

*"I feel confident to do this as well as use PD and reflective practice to strengthen these skills."*

*"At this stage I am semi confident however I expect this to increase as I begin to use some of the skills learnt with consumers in my practice."*

When asked to comment about the support structures they require to transfer training into practice, staff feedback indicates, that the opportunities available or knowledge of what opportunities are available may vary across sites:

*"I have started discussing and role playing in PD and it is helping to learn how to ask questions that enable the consumer to gain insight into what they are truly desiring."*

*"The team that I work with are extremely supportive and we believe strongly in recovery. I receive a lot of support from them."*

*"There needs to be a way to reinforce what we learned on a regular basis so it sticks. A booster every six months or whatever is great but it needs to be integrated into our daily practice in a deliberate way. To do that, there needs to be space during the work week to allow for reinforcement/reflection/discussion of the ideas we covered in the workshop so we are continually improving and internalising what we learned yesterday."*

## CRM Training as Informing Practice

## How staff rate CRM Training for Informing Practice

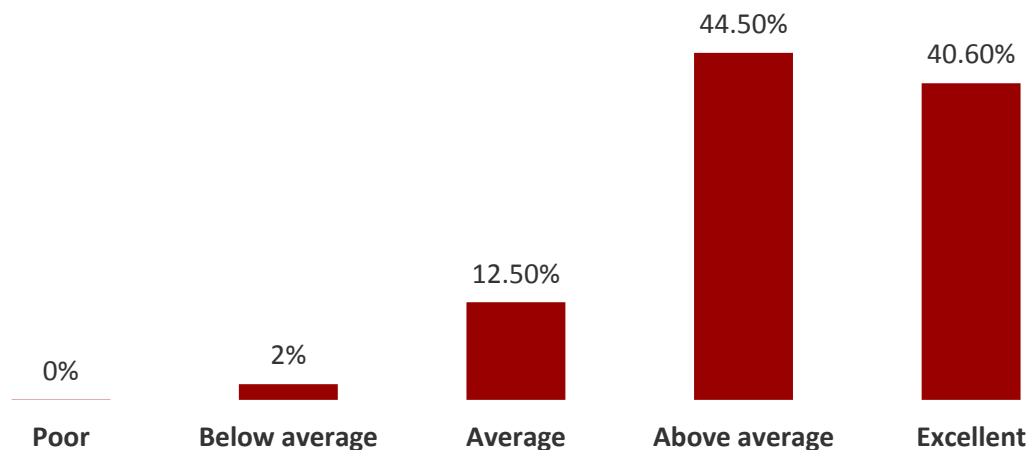


Figure 2. Percentage frequency ratings by which staff rate CRM training as informing practice.

More than 85% of staff after attendance at CRM training rate the training as being above average or excellent towards informing their practice (4.23 mean out of 5). Staff feedback indicates that both the structure and content of workshops are useful towards informing practice.

*“The ability to role play the coaching relationship with a variety of people was extremely helpful, especially in terms of gaining knowledge and boosting confidence. Getting some background knowledge of the CRM (e.g. processes and stages of psychological recovery) was also really helpful. Some of the strategies the facilitator used in teaching these and other concepts were great (I’m definitely stealing some of these ideas!).”*

*“It was wonderful to hear how my colleagues are creative with CRM. I plan on using some of their techniques!” (Onsite team booster)*

*“I found the (booster) workshop to be very helpful in general. Many of the areas I need to improve in my practice are clearer and I can see new ways of adjusting what I already do to be more effective in terms of gathering and recording CRM data.”*

*“I loved the open forum of this training and learning from the input and experience of others. I welcome other forums like this where we can continue to keep CRM on the agenda and in focus in our work. Attending training like this makes me more passionate about what we do and how we can have recovery focused conversations with consumers without being too hung up on the tools and paperwork.”*

Staff also conveyed that they would like more access to ideas and resources that allow them to implement the model more flexibly.

*“... to get more resources I can take away with me. Not everything works with every consumer and it would be good to have lots of different resources to help all consumers in different ways”.*

*“I would like to learn alternate ways of interacting with consumers - e.g. using art and creative approaches to communicate and engage with people (also learning more about how to respond to different learning styles and communications approaches).”*

## How staff rate CRM Training Facilitators

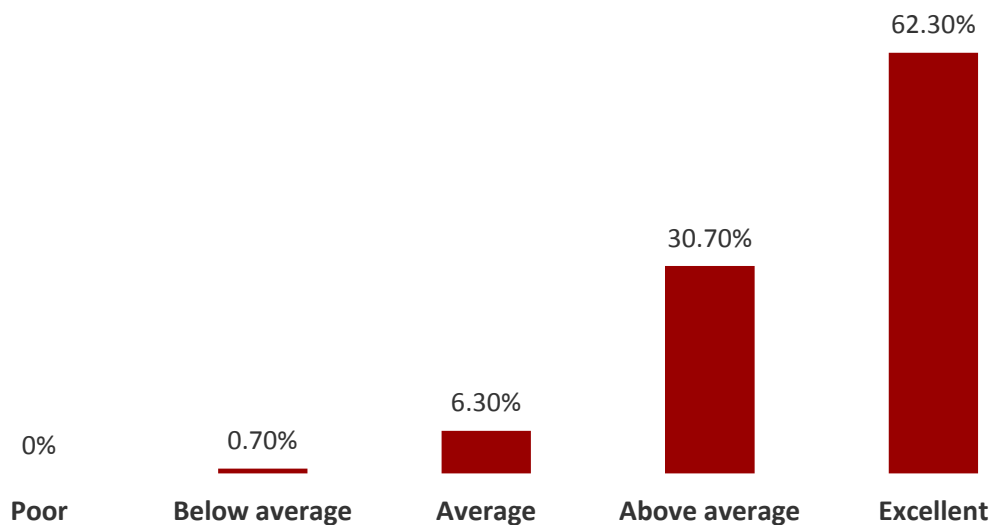


Figure 3. Percentage frequency ratings by which staff rate CRM training as informing practice.

Feedback from staff, upon completing formal CRM training, in relation to facilitator skills demonstrate that staff mostly experience the facilitation style and the skills, knowledge, and experience of the facilitators as being a highly valuable. On average the facilitators get very high ratings. More than 90% of staff rate the CRM training facilitators as being above average/excellent (4.55 mean out of 5). Feedback has also indicated that staff would like more opportunities to learn from consumers' experiences of using the CRM protocols

*"The facilitators were excellent, knowledgeable and understanding. Great asset for Neami National."*

*"I think both presenters brought a unique and individual perspective to the training whilst maintaining the integrity of the learning outcomes."*

*"Trainer was excellent. xx allowed us room to explore the things we had questions around and helped us to recognise as a team how we could improve our practice."*

*"It was great that we came away from training with a number of written resources and also recommendations for other resources to seek out if / as needed / desired. The facilitators' training was amazing. Xxx was obviously backed by a great deal of knowledge and hands on experience and always had an interesting and interactive approach to learning."*

*"...have consumers involved in providing training, ie sharing experiences and feedback about CRM tools."*

## The more positively staff rate CRM training the more likely they are to use CRM to guide their work with consumers.

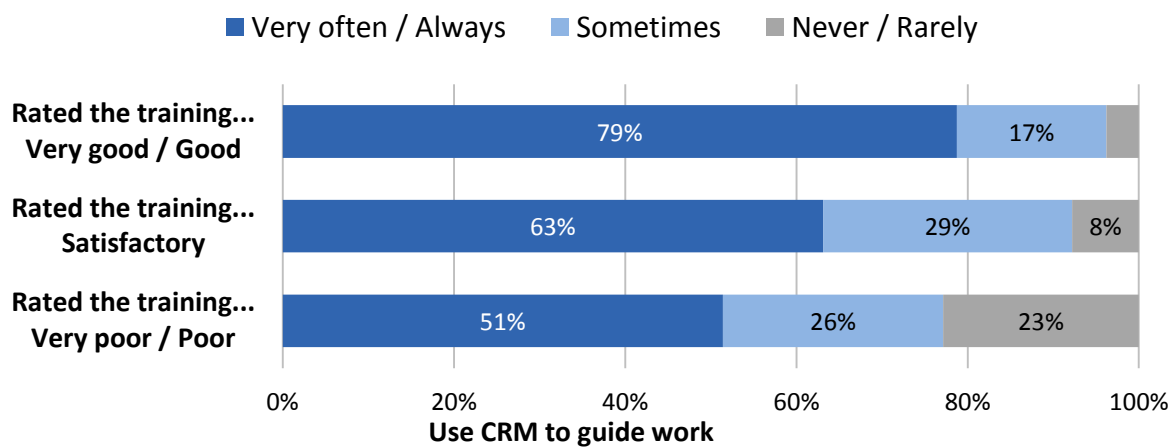


Figure 3. Comparison between staff ratings of training and frequency by which staff rate themselves as using the CRM as a structure to guide their work practices (Part 2 Q4 of online survey)

Perhaps not surprisingly, the more positively staff rated CRM training; the more likely they are to use the CRM as a structure to guide their work practices. This positive relationship also applied to semi-formal and informal learning experiences.

### Context and Discussion

Recent training transfer literature demonstrates the importance of scaffolding formal learning events with supplementary work place learning experiences to increase the degree and success of implementation.

Pivotal to any learning strategy is the creation of an environment where learning opportunities are both valued and facilitated on an ongoing basis. Learning and Development strategies promoted by NN recognise that whilst new learning is initiated and encouraged in training, it is reinforced and developed through continued supervision, mentoring and coaching by team leaders in the field. The results obtained in this part of the study demonstrate that staff attribute a range of learning experiences as supporting their confidence and competence to use the model effectively in their work practice.

However, successful implementation relies not only on organisational policies and structures but also on the personal engagement of individuals and teams. Staff feedback from the CRM online survey and post training surveys identify that there is a need to be more attentive in ensuring learning opportunities “remain on the agenda”. Staff feedback also reveals that there is a variance in how workplace learning opportunities are initiated and maximised by individuals and across teams.

Staff questions and comments demonstrate that at times individuals and teams struggle to create ways to use the CRM flexibly to meet the less generic needs of the consumer populations they work with.

*“...I think sometimes people need more structure around implementing them and can struggle with the concepts and being flexible with them and adapting them to consumers’ needs -*



*especially around cultural diversity - I think it would be a very good and a wise dove tail to include some cultural responsiveness training with the CRM training - possibly to think about including cultural responsiveness with the next round of booster sessions - get people to think about how the CRM and cultural responsiveness can work together."*

Cultural diversity is one example among a number of diversity issues staff have identified where additional practical knowledge and resources need development to ensure CRM practices are accessible and meet the needs of consumers in a meaningful way.

Facilitating creativity and adaptability relies on individuals within teams to work together to generate ideas, responses and solutions that can meet these needs. Across the organisation there is potentially a wealth of ideas and knowledge of alternative resources that if shared would mean individuals and teams would not be required to totally re-invent the wheel. Possible limits may include leadership co-ordination constraints and competing priorities, however, organisational structures, guidelines and resource development can support such initiatives.

## Summary

The results obtained in part one of the online survey demonstrate that staff value a range of learning experiences as contributing to their confidence and competence to effectively use the CRM. NN's approach has been to implement strategies that support staff to build on learning and practice development from initial formal training through to the less formal workplace learning opportunities. Staff ratings confirm the usefulness of these strategies to assist them in being able to implement the CRM within their work practice.

Staff feedback from the online survey and post training surveys demonstrate possible areas for refinement and/or development:

- 1) There is a variance in how workplace learning opportunities are initiated, maximised and maintained between individuals and across teams.
- 2) There is a need to develop ideas and resources, consistent with the principles and structure of the CRM, which will enhance our ability to more flexibly engage with consumers who have diverse needs.

## Demographics

Table 1. Demographics of staff who responded to Neami National online CRM fidelity survey

### *Staff respondents by State*

VIC	SA	WA	QLD	NSW	Total
75 (34.9%)	31 (14.4%)	8 (3.7%)	12 (5.6%)	89 (41.4%)	215

### *Length of time at Neami*

Under 6 mths	6-12 mths	1-2 years	2-3 years	3-5 years	Over 5 years
26 (12%)	35 (16.2%)	49 (22.7%)	28 (13%)	47 (21.8%)	31 (14.4%)

### *Length of time working in Mental Health services*

Under 6 mths	6-12 mths	1-2 years	2-3 years	3-5 years	Over 5 years
12 (5.6%)	25 (11.6%)	40 (18.5%)	26 (12%)	37 (17.1%)	76 (35.2%)

### *Service delivery type*

Outreach	Homeless	Sub-Acute	Peer Support	Arts	PIR
160 (70.7%)	4 (1.1%)	23 (10.9%)	18 (9.8%)	10 (4.6%)	5 (2.9%)

### *No. of CRM Boosters workshops attended*

0	1 Session	2-3 Sessions	4-5 Sessions	More than 5
35 (16.3%)	59 (27.4%)	97 (45.1%)	17 (7.9%)	7 (3.3%)

### *Age of respondents*

19-29	30-39	40-49	50-59	60-69
70 (32.4%)	70 (32.4%)	46 (21.3%)	22 (10.2%)	8 (3.7%)

### *Education level*

High-School	TAFE	Bachelor	Post Grad/Mast	PhD
5 (2.4%)	44 (21.1%)	93 (44.5%)	65 (31.1%)	2 (1%)

## More information

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