



The Salvation Army (TSA) Australia Eastern Territory (AUE) Forward Together (FT) Headquarters (HQ) Restructure 12-Month Review

Purpose: *TPMC Report (short)*

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Together we see people finding freedom in Jesus

01 People transformed by Jesus <small>Soul saving</small>	02 Healthy faith communities <small>Growing saints</small>
04 Courageous stewards <small>Using our mission resources effectively and efficiently</small>	03 Unified mission expressions <small>Serving suffering humanity</small>



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Executive Summary

This report provides an analysis and evaluation on missional and operational effectiveness 12 months after the Australian Eastern Territory's (AUE) Forward Together restructure (January 2016). Methods of data collection included an online survey, telephone interviews and questionnaires and these were used to compare findings with the six-month review (July 2016). All statistical and anecdotal information can be found in the appendices. Results of data analysed show that culture has improved, the introduction of the Area Officer role has had a successful impact in assisting the frontline refocus on missional work (as opposed to administrative tasks), and since the last review, Support Partners relationships have also improved along with operational effectiveness (although there are still areas for improvement). In particular, comparative performance shows the territory still has opportunities for improvement in the areas of leadership, communication, transparency, decision making, accountability and goal setting.

This report finds the prospects of AUE in its current position are moving towards a positive trend, however more needs to be done particularly in light of the Australia One program. There are some areas that require further investigation and remedial action by leadership (see Recommendations on page 12).

Recommendations discussed include:

- Improving Area Officer (AO) interaction and planning
- Addressing THQ Support Partner and Program Support processes and information flows
- Cultivating, communicating and monitoring cultural change

The restructure had five key objectives that have been evaluated in this report and summarised below:

Table 1: AUE Restructure Objectives, Strengths and Opportunities

Five Key Objectives	Key Strengths	Key Opportunities
1. Highly effective spiritual formation, leadership, personnel development and accountability at every level (territorial, divisional, missional, social, operational).	<ul style="list-style-type: none"> • The Area Officer (AO) role is seen as beneficial by Corps Officers (COs) in strengthening missional effectiveness though: <ul style="list-style-type: none"> - connection - support - receiving pastoral care 	<ul style="list-style-type: none"> • Agree appropriate levels of AO interaction based on unique individual needs of COs i.e. not adopting a standard broad brush approach. • Set clear and agreed missional plans combined with AO accountability support. • Strengthen the levels of: <ul style="list-style-type: none"> - leadership transparency in decision making and rationale - consistency and fairness in decisions made by leaders - holding all levels accountable for decisions



Five Key Objectives	Key Strengths	Key Opportunities
<p>2. Structures designed to focus all expressions on mission priorities.</p>	<p>Releasing the frontline from the burden of administration to focus on mission priorities:</p> <ul style="list-style-type: none"> • AOs are showing an increased level of confidence to support COs with administrative matters (relating to THQ/DHQ). • COs identify their AO as someone who can 'lead them in the right direction' for administrative support. 	<ul style="list-style-type: none"> • Create more understanding and support for social programs (including corps-based social expressions) through the AO role as it plays an integral part in the integrated corps and social space. • Strengthen AO coaching (despite a large proportion of COs reporting not benefitting from it).
<p>3. Clear and achievable roles and responsibilities at every level.</p>	<ul style="list-style-type: none"> • Improved understanding of the AO role. 	<ul style="list-style-type: none"> • Clarify the authority and decision making components of the AO role. • Clarify CO authority levels for Support Partners. • Clarify the role of the AO in facilitating the inclusion of social expertise for frontline planning.
<p>4. Mission expressions focus on being more effective, empowered, equipped, connected and supported.</p>	<ul style="list-style-type: none"> • Improved feelings of frontline empowerment and trust to make more decisions. • Improved approval processes as a result of increased delegated levels of authority at the frontline. 	<ul style="list-style-type: none"> • Improve connectivity to reduce perceived isolation across a geographically diverse workforce - particularly those based in regional/remote areas. • Increase training support and communication throughout organisational change. • Improve access to reliable and current information on change. • Recognise and actively manage change fatigue.



Five Key Objectives	Key Strengths	Key Opportunities
<p>5. Streamlined business functions (no unnecessary or duplicated processes).</p>	<ul style="list-style-type: none"> All Support Partners and Social Program Department scored higher (out of 10) in the online survey in this review. Knowing who to speak to has significantly improved since last review. 	<p>Address issues raised across all Support Partners:</p> <ul style="list-style-type: none"> Accessibility and timeliness of service. Processes – includes inefficiencies and a lack of information. <p>Address unique challenges identified across some of the Support Partners and the Program Support, which include:</p> <ul style="list-style-type: none"> Behavioural (e.g. silo attitudes, directive approaches rather than collaborative). Flexible approaches to managing 'outside of the box' queries. Knowledge management e.g. knowing who to speak to for what purpose, and understanding local context requests / issues. Processes e.g. how to make requests (IT ticketing system). Recognition and understanding what a department offers.



Background

Six design elements were deployed to meet the objectives of the Forward Together restructure:

1. Reduce the number of divisions from seven to two to create greater consistency across the Territory.
2. Push responsibility for mission to the divisions.
3. Pull responsibility for administration (Support Partners) to Territorial Headquarters (THQ).
4. Redesign boards for more efficient, transparent and consistent operation.
5. Create an Area Officer (AO) role to coach, support and provide accountability for mission.
6. Increase delegations of authority at the frontline.

These objectives were also aligned with the Forward Together goals of:

- People transformed by Jesus.
- Healthy faith communities.
- Unified mission expressions.
- Courageous stewards.

The six-month review (July 2016) findings and recommendations were documented in 'TSA AUE - HQ Restructure Six-Month Review - TPMC Report - September 2016 v1.1'.

Note: The six-month review included focus group sessions held across three leadership teams: Social Program Department, NSW/ACT DHQ and QLD DHQ.

A new Mission Support Team (MST) structure came into effect on 29 August 2016, and was therefore not included in the six-month review. However, they are included in this review.

In April 2017, the SCU commenced this 12-month review, which included:

1. **Online survey** – 823 respondents from TSA personnel.
2. **Questionnaires** – sent to AOs and divisional leadership teams in NSW/ACT and QLD Divisional Headquarters (DHQ), however only nine AOs responded.
3. **Phone interviews** – 69 interviews were conducted across Corps Officers (COs), chaplains, social centre managers and Family Store managers.

As with the previous report, this report was independently reviewed by the Christian Research Association (CRA) in May 2017. The following was extracted from the CRA review:

“CRA is pleased to endorse the AUE report and confirm that in general the analysis contained within the report demonstrates a rigorous and accurate representation of the findings of the various elements of this research and evaluation project.

CRA congratulates The Salvation Army (AUE) Strategic Change Unit on the completion of a thorough and robust evaluation and final report. We have been pleased to be involved in this process.”



1. Key Findings

One of the common themes in the six-month review was that it was ‘still early days’. This 12-month review shows that enough time has passed to present a clearer picture of the restructure and where it is continuing to work well, as well as where areas of opportunity still exist.

Albeit, there were slightly less participants in this review (across all sources) compared to the previous review, which may be an indicator of potential TSA officer/employee ‘feedback fatigue’ – particularly, with an increase in similar restructure activities conducted by the Australia One program:

Table 2: Comparison of participation from the six-month review to the 12-month review

Sources	Respondent Participation Rates	
	2017	2016
Survey respondents	↓ 823	1,012
Telephone interviews	↓ 69	75
Questionnaires	↓ 9	19

Irrespective, a key area that strengthened because of the restructure was the introduction of the Area Officer (AO) role to support Corps Officers (CO) in resolving issues through THQ and DHQ channels by engaging a collaborative approach rather than disconnecting.

This review also shows remaining opportunities for improvement to streamline Support Partner processes and lighten administrative burdens for the frontline.

This section will examine key findings presented in this review:

- Area Officer (AO) role
- THQ Support Partners and the Social Program Department
- Change management and communications
- Culture

1.1 Area Officer Role

The introduction of the Area Officer (AO) role has indicated success in pastoral and administrative problem-solving support with a greater feeling of connection experienced, as evidenced by CO feedback.

AOs have developed a deeper level of understanding of their role in how they can help a corps improve its missional effectiveness. In general, AOs have a much more positive outlook on their role than COs do.

Since the last review, a perceptual gap of the role has widened. One area that has continued to deteriorate is where COs agree to set a clear plan to strengthen missional effectiveness with the support of their AO. Almost half of the COs surveyed disagreed they had a plan in place (10% less than the last review, which illustrated that 40% of COs did not



agree there was a clear plan in place). Furthermore, only 45% of COs agreed that the AO role was well-positioned to hold them missionally accountable.

Another area of concern was the role AOs play in the integration of corps and social. Feedback suggests that the current level of understanding and support of social programs (including corps-based social expressions) is of particular concern. Furthermore, when frontline planning is underway and an AO lacks social program knowledge and/or experience, this issue is further compounded because planning does not include relevant social expertise.

In so far as their coaching capability, AOs are confident of their ability despite a large number of COs saying that they had not benefitted from the coaching support provided. It is evident that COs and AOs vary in understanding of the AO role, particularly in the areas of authority and decision-making capabilities. The AO role is described as “not really a decision making role”, one that has “helped connect people together” and a role to enable “quick conversations and decisions”.

Overall though, understanding of the role has improved with a perception that it is central to the Forward Together restructure. Some COs are using their AOs as a ‘first point of contact’ and someone who can ‘lead them in the right direction’ for administrative support. Other COs cited their ‘main interaction’ is with their AO.

COs reported that they had experienced a greater level of support and pastoral care from their AOs - as cited in responses on the frequency of interactions or visits from their AO:

- Interactions/visits are frequent and this is beneficial.
- Interactions/visits are frequent however, given the experience of the CO, this is not required.
- Interactions/visits are infrequent and they would prefer it was more often.

1.2 THQ Support Partners and Social Program Department

1.2.1 Overall

Whilst this review has delivered mainly positive feedback for Support Partners (all departments have improved), systemic issues still abound and have led to administrative burden for the frontline. The most prominent opportunities for improvement are:

- Accessibility and timeliness of service.
- Processes – includes inefficiencies and lack of information.

Most evident in the survey results was that every department improved with:

- Higher ratings out of 10
- More positive ‘free text’ comments (compared to negative ones)

In particular, an area of specific improvement was knowing who to speak to (although, in some instances, it still remains a problem area). The increased levels of delegated authority for the frontline have also resulted in some improvement to approval processes.

The most common positive feedback theme across all departments was that staff were ‘friendly, supportive and professional’.



When respondents in the survey and telephone interviews were asked about their experience of THQ Department support, at least 50% of the frontline felt there had been no real change (which was similar to the six-month review), particularly in the areas of:

- Time spent on administrative tasks.
- Time waiting on THQ/DHQ approval.
- Feeling a greater level of trust and empowerment.
- Streamlined business processes.

Furthermore, there had been an improvement in departmental understanding of the AO role, although the increase in CO authorisation levels still remains unclear as there were instances where Support Partners sought Divisional Commander or AO authorisation for CO requests and these should have been within the CO approval level.

1.2.2 Communications and Fundraising Department (CFD) (Additional Items)

Having regionally-based CFD team members is working really well for the frontline with significant positive feedback attributed to this aspect. However, a perception still remains that CFD works in a silo, using a directive approach rather than a collaborative one (particularly in regard to the Red Shield Appeal).

A continuing concern that pervades is knowing 'who' to speak to about 'what' issue and there are indications that the size and complexity of the team present some very real challenges for better engagement.

1.2.3 Finance Department (Additional Items)

There was particular praise for the Corps Finance team, as noted across all frontline teams, but sometimes there is confusion as to who deals with what.

Significant improvement can be seen in feedback provided on the budget process, even though there is still some frustration with it. Two other processes that were identified as areas for improvement were:

- Credit card reconciliation process.
- SSG invoicing (mailing paper copies) process.

Given the number of different processes and forms used when dealing with Finance, it had been highlighted that it is even more important to have one place as a source of truth.

Feedback also suggested that Finance response rates were usually good for straightforward requests. However, it was observed that when it came to 'outside the box' requests the Finance Department can be quite rigid or inflexible.

1.2.4 HR Department (Additional Items)

In both reviews, the HR department scored the highest rating out of 10 (at 7.6) even though a few key issues were identified in this review:

1. A source of ongoing frustration was that HR representatives sometimes did not understand requests or issues, which would lead to a solution not being fit for purpose.
2. A number respondents found that processes were either unclear or not documented (e.g. the performance review process).



3. As a result of changing HR consultants regularly, many respondents mentioned that they did not know who to speak to.

1.2.5 IT Department (Additional Items)

As evidenced by positive feedback in this review, IT has seen the greatest improvement yet some keys issues still abound:

1. Timeliness of service is still well behind that of all other departments (compared to the next lowest score in the survey at 29%), with 42% of respondents who said that they did not think they had received timely and efficient service. Exasperating for respondents as this may have been, another area of frustration was not being updated on request or issue progress.
2. The ticketing system is also a major cause of angst that one particular example highlighted - tickets are being closed before an issue is resolved. It was common for respondents to mention that because of the ticketing system, they would prefer to circumvent the process and speak to someone directly.
3. Given the frontline tends to have unique needs, a one-size-fits-all attitude (and not thinking outside the box) was something that respondents found particularly frustrating.

1.2.6 Mission Support Team (MST) (Additional Items)

One of the biggest concerns facing MST is that people simply don't even know they exist. In particular, corps would be considered a primary 'customer' and yet they are not clear on what MST does or what it could offer to corps.

1.2.7 Property Department (Additional Items)

Whilst there was praise for Area Property Managers, respondents felt that there is too much expectation placed on them, which could potentially lead to delivery timeframe and accessibility issues.

Also, a number of processes are considered to be inefficient and resulting in longer than expected lead times.

The survey highlighted a perception there is sometimes a lack of understanding between what the corps actually need and what they receive, which results in frustration and solutions that are not fit for purpose.

1.2.8 Social Program Department (Additional Items)

A significant improvement for the Social Program Department is a perception that it works collaboratively – although, collaboration is still a prominent issue.

Whilst not part of the restructure, Doorways / Salvos Assessment Line (SAL) continued to dominate feedback with an overwhelming response that it is not working well.

Feedback also suggests an increasing gap between corps and social - a sentiment shared particularly by AOs.



1.3 Change Management and Communications

Concerns around communication and a perceived lack of access to reliable and current information was expressed by every part of the organisation but it mainly appears to be more acutely felt by corps.

A sense of change fatigue is being felt, particularly with Australia One on the horizon.

Furthermore, there is a perception of increased isolation and a lack of training support available throughout organisational change to assist a geographically diverse workforce (particularly those based in regional, rural and/or remote areas).

1.4 Culture

Almost 50% of survey respondents felt that some cultural improvements had occurred with the following:

- Empowering and trusting people to make decisions
- Consistency and fairness in decision making by leaders
- Leadership transparency on decisions being made and why

Almost 40% of survey respondents felt that some cultural improvement had occurred with 'holding people at all levels accountable for their decisions'. Although compared to the last review (when only 35% felt culture had improved and 50% felt there was no change at all), this review showed a shift away from those who felt there was no culture change with more positive sentiment.

AOs were particularly optimistic about a positive cultural change they see developing as part of the Forward Together restructure, although there is also quiet concern that the Australia One program changes will overshadow and possibly reverse this shift.



2. Recommendations

The following recommendations recognise that the implementation of targeted action will be a more effective and efficient use of time rather than large-scale / wholesale changes considering the transitional Australia One environment.

2.1 Area Officer Frontline Interaction and Planning

Recommendation 1

A series of immediate root-cause analyses is to be conducted to explore the following (TBD in line with an Australia One role definition):

- The absence of clear and agreed mission vibrancy plans with local corps, and accountability (both missionally and spiritually) to those plans.
- The lack of social integration into local mission vibrancy plans, including AO awareness to support social expressions.
- A lack of consistency and clarity on the agreed focus of the AO role.
- Under-utilised coaching of COs, particularly to advance agreed mission vibrancy plans.
- A lack of understanding of local leader support needs in relation to missional vibrancy, which consider various nuances i.e. experience, preference, confidence, ministry style.

Causes to explore include: Skill set of current AOs, training for AOs before and after appointment (investigate a national training approach), corps review process, delegated authority of AOs and lack of corps leadership teams.

2.2 THQ Support Partners (Overall) and Program Support

Recommendation 2

THQ Support Partners and Program Support are to ensure the following:

- They maintain current information on the Intranet – particularly processes, forms and contact information.
- They direct the frontline to the Intranet as a source of informational truth in all interactions.

Recommendation 3

THQ Support Partners are to improve staff understanding in the areas of:

- When to involve a Divisional Commander and/or AO in the approval process.
- CO approval limits and the provision of refresher education for all departments.

Recommendation 4

THQ Support Partners and the MST are to develop a frontline engagement plan, in collaboration with their frontline stakeholder groups, which is to include:

- A strategy aimed at demonstrating a 'partnership' culture including; planning cycles, training plans and interaction plans.
- Key customer service level agreements (SLAs) developed to:
 - Provide clarity on response and issue resolution times.
 - Provide visible and accessible tracking of requests and submissions through to completion.
 - Ensure accountability by regularly measuring and reporting on actual performance against SLAs.



Recommendation 5

THQ Support Partners are to investigate the introduction of a phone line in order to triage calls from the frontline to the correct department(s).

2.2.1 Communications and Fundraising Department (CFD) (Additional Items)

Recommendation 6

For the frontline, CFD is to build awareness of and clarify its unique service portfolio, acknowledging this portfolio includes external-facing services. The aim is to improve and strengthen collaborative experiences of specific interactions such as, the Red Shield Appeal.

2.2.2 Finance Department (Additional Items)

Recommendation 7

The Finance Department is to investigate and identify improvements for two to three processes e.g. the budget process, credit card reconciliation process or invoicing process, which the frontline had indicated are the most frustrating.

2.2.3 HR Department (Additional Items)

Recommendation 8

The HR Department is to develop a communications strategy to inform AOs / COs / DHQs / departments when a HR consultant is allocated to their portfolio and who that consultant is.

2.2.4 IT Department (Additional Items)

Recommendation 9

The IT Department is to use ticketing system data to drive support performance and effectiveness with the aim of reducing outstanding response and waiting times specifically for:

- Existing tickets that have been outstanding for a long time.
- Tickets that have closed before a matter is resolved.

Recommendation 10

IT is to rollout the ManageEngine web application (helpdesk.salvos.net) across TSA so staff can initiate, monitor and follow up online requests.

2.2.5 Mission Support Team (MST) (Additional Items)

Recommendation 11

MST is to review the level of engagement and collaboration with local corps to improve awareness of its services offered and how to better engage with those services.

2.2.6 Property Department (Additional Items)

Recommendation 12

The Property Department is to explore the workload remit of Area Property Managers to ensure positive relationships and performance continue to improve.



2.2.7 Social Program Department (Additional Items)

Recommendation 13

A joint divisional and social program review is to be conducted on the effectiveness of the hub missional network and its value for mission collaboration. Further, it is recommended that leadership and focus on missional vibrancy is included as part of this review.

Recommendation 14

Whilst there was feedback on Doorways, it is recommended that it is to be addressed outside of this review.

2.3 Change Management and Communication

Recommendation 15

The Australia One program is to review this report as 'lessons learnt' to inform the national program in its planning approach towards change readiness, communication and the implementation of effective ways to reduce change fatigue.

Recommendation 16

It is further recommended that the Australia One program continue to take the experience of AUE groups impacted by the Forward Together restructure into consideration during future planning processes.

2.4 Culture

Recommendation 17

The Australia One program is to consider the cultural aspects identified in this report as key learning to factor into national strategic planning. These cultural aspects include:

- The appointments process.
- Frontline empowered and trusted to make decisions.
- Transparency, consistency and fairness in decisions made by boards and leadership.

Recommendation 18

A working group comprising representatives from Divisions, Support Partners, Social Program and the regional, rural and remote frontline, is to be commissioned to review the policy, methods and channels to support individual needs of the regional, rural and remote frontline group.