

Valuing support: culture and practice in a person-centred organisation

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Abstract

Against a back drop of ongoing reform of health and adult social care in “austere” economic conditions much of the rhetoric in England from politicians, statutory bodies and commissioners appears to focus upon what can not be done and what is “wrong”. Using a case study of a provider of independent living support services, we present a snap shot of what is possible and what can go “right”. Through triangulating the lived experiences of individual disabled people, the personal values prioritised by trustees and staff who support those people and an employee engagement survey we describe the functioning of a medium sized voluntary sector social care organisation. Drawing upon our findings we suggest that, even at a time of significant resource constraint, person-centred practice delivered through a consciously values aligned culture is not an impossible dream but an achievable goal.

Keywords: person-centred; personalisation; social care; values; culture; employee engagement.

Background

This report provides an empirical snapshot of the functioning of *Options for Supported Living* (hereafter in the report for brevity simply *Options*), utilising the Making it Real (MIR) criteria and exploring its organisational values in practice, according to those who provide and those who use it. The snapshot of that organisational functioning reported below was generated in a wider of context personalisation in British social policy, which is outlined in the literature review. Its particular local context at the start was of transferred Wirral Metropolitan Borough Council contracts on Merseyside.

Options was established as a registered charity 20 years ago with the expressed intention of maintaining a focus on person-centred delivery and ensuring that people supported could exercise choice and control over their daily lives. Its on-going mission is to ‘support, empower and enable disabled people to live their lives to the full’. With this aim in mind it currently employs 343 individuals and is governed by a board of six trustees. The past 10 years has an emphasis on service commissioning and delivery being shaped by a policy of “personalisation” (hereafter in the report used without speech marks). Implicitly then the snapshot presented here depicts that new national cultural context of practice, and the extent to which that culture has enabled user-centred norms. In a context of this policy shift, from block contracts to a new start with an aspiration for person-centred service planning and delivery, what lessons might be drawn for other organisations nationally?

In order to answer that question and to establish the degree of success achieved in this local case study, the report below provides findings about individual and collective values expressed by workers at different levels of seniority in the organisation. The combined use of the MIR guided user interviews, the audit of staff values and the staff survey were aimed at providing a robust picture of the work of *Options* and its progress in putting person-centred delivery and the policy of personalisation into daily practice. The findings and discussion later in this report together reveal for the reader the extent to which that aim was achieved. Before those findings are presented and discussed a brief review of the recent literature relevant to personalisation is presented along with an introduction to culture and values.

Literature Review

Over the last few decades, there has been growing dissatisfaction over the “service-led” approach to social care in the UK. As a result, policy-makers devised a number of reforms which aimed to modernise the social care system. Central to this agenda has been the policy of ‘personalisation’. This places an emphasis on tailoring services to the individual needs of the user, rather than fitting them into existing services which may not offer the right kind of support for their particular circumstances (Harlock, 2010: 371).

A key element of this policy is therefore to offer people greater choice and control over the services they receive. Another term which is gaining increasing salience in discussions about personalisation is ‘co-production’. Co-production is used as a new way of talking about direct participation, community involvement and power and expertise sharing in social care services in the UK (Carr, 2010: 22).

The personalisation policy became evident in several government documents between 2001 and 2006. For instance, the *Valuing People* (DH, 2001) White Paper’s key objective was to make direct payments available to more people with a learning disability, and to introduce person-centred planning as part of social work practice (SCIE, 2010). Personalisation was then officially introduced into government policy in 2007, when the *Putting People First* concordat was published (HM Government, 2007).

Putting People First (PPF)

The PPF programme was formed out of an agreement by six government departments, the Local Government Association (LGA), the Association of Directors of Adult Social Services (ADASS), the NHS, representatives of independent sector providers, the Commission for Social Care Inspection, and other partners in December 2007 (NAO, 2012: 16). The transformation to social care outlined in PPF included major changes in: ‘organisational arrangements, processes and culture; professional roles within adult social care services; the role of local authorities in structuring local social care markets; the roles of voluntary organisations and service providers; and the expectations and responsibilities of social care service users and their carers’ (Harlock, 2010: 373).

The programme was supported with a set of administrative tools, such as guidance and milestones to track local authorities' progress, created jointly by the PPF consortium. The consortium was comprised of members from the LGA, ADASS and the Department of Health (DH). PPF ended on 31 March 2011 when it was taken over by Think Local Act Personal (TLAP) (NAO, 2012: 16).

TLAP and Making It Real (MIR)

TLAP is the present national, cross-sector partnership 'that underpins local authorities' work with health and third sector organisations to improve how adult social care is provided' (NAO, 2012: 16). They have worked with the National Co-Production Advisory Group (NCAG) – a group of people who use services and carers – to develop a set of "progress markers" called Making It Real (MIR) for all those working towards the goal of personalisation.

MIR is a set of 26 "I" statements made by people who use care and support, saying what they would expect, see and experience if personalisation is real and working well in an organisation. These statements have been grouped around the following six themes:

- 1) **Information and advice:** Having the information I need, when I need it.
- 2) **Active and supportive communities:** keeping friends, family and place.
- 3) **Flexible integrated care and support:** my support, my own way.
- 4) **Workforce:** my support staff.
- 5) **Risk enablement:** feeling in control and safe.
- 6) **Personal budgets and self-funding:** my money.

These co-produced markers were launched in May 2012 in order for the sector to share publicly the progress being made. Once "signed up", organisations are expected to show that they were using the markers to identify their top three priorities for change, and to develop twelve month action plans aligned with them. MIR has also been designed so that service users and their families can provide feedback directly to the organisations (TLAP, 2012).

Personalisation in Practice

Some preliminary research into the implementation of the personalisation agenda has been completed. For instance, the PPF Workforce Study (2010) aimed to understand how authorities across England were approaching changes to the adult social care workforce. Based on a study of some key authorities, it found that the majority undertook major workforce restructuring (including changes for both front line staff and management) and changes to facilitate joint working. Another finding was that roles had been created for new front-end services including: prevention and promoting independence; re-ablement/enablement; information, advice and guidance; and helping people find and purchase care services (PPF consortium, 2010: 2).

Research was also commissioned by the Voluntary Sector Social Services Workforce Unit (VSSSWU) into the impact to the workforce of personalised social care services. This was drawn from policy makers and three voluntary organisations in Scotland, with interviews from managers, employees and people who used the services.

The research revealed that front line voluntary sector workers face considerable demands on their time through calls for enhanced decision-making, dealing with and taking on the tasks of other professionals, community building and risk enablement skills. Compared to previous approaches to care...where there was heavy monitoring of daily routines and organisation of work, this represents a degree of up-skilling and expansion of task empowerment and autonomy for front line workers. A consensus was apparent across all the groups interviewed that there were groups of workers within the case study of organisations that lacked all or some of these new skills (Cunningham and Nickson, 2010: 21).

Despite this finding, it is worth noting that the report also stated that the organisations looked at were attempting to overcome these skill gaps, and implement the principles of personalisation, by introducing changes to key areas of HR policy and practice. This included developing sensitising training programmes to the principles of personalisation, in order to improve service delivery, and performance management systems that focused on notions of ‘customer satisfaction’ (Cunningham and Nickson, 2010: 21).

It should also be pointed out that the above research was published in 2010, prior to the introduction of the MIR tool. Nonetheless, a concern revealed in this study, still pertinent at present for all voluntary sector organisations, is that the aims of up-skilling the workforce risked being undermined by a lack of future resources for training, as a result of government budget cuts (Cunningham and Nickson, 2010: 21). This and other points will be considered in relation to other literature relevant to the findings of this study in the ‘discussion of findings’ section of the report later.

Over a two year period Merseyside Disability Federation (MDF), on behalf of the North West Disability Infrastructure Partnership (NWDIP), undertook a research study to develop a narrative of the experience of disabled people. This aimed to understand the experience of disabled people, Disabled People User Led Organisations, families and carers and voluntary sector providers from across the North West in relation to the implementation of personal budgets in Local Authority areas. Reports published in March 2012 and March 2013 highlighted the challenges that still exist in fully embedding a culture of choice and control for disabled people when designing, commissioning and delivering person centred services (MDF, 2012 & 2013)

Culture in Practice

Given that personalisation and aspirations for person-centred practice reflect the truism that policy is about the allocation of values in society, in reporting the functioning of *Options* the findings below reflect not just the deployment of skills but the embodiment of values. They describe “how” an action is executed as opposed to “what” action is executed. That enactment is subject to the influence of organisational culture and the values of the individuals within it.

Organisational culture here is taken to be a collection of fundamental values and belief systems which give meaning to its participants (Pettigrew, 1979; Schein, 1985; Sackman, 1991; Hatch, 1993). Meaning is one of the central themes of *Firms of Endearment*, which seeks to identify the antecedents for superior organisational performance and identifies culture as the vital “secret” ingredient.

Like air, culture is invisible but pervasive. It exerts a strong transformational influence upon those that experience it, especially employees. Employees pumped up about their companies infect customers with their enthusiasm. Customers reciprocate with their own enthusiasm to round out an exquisitely symbiotic relationship whose significance is lost to those who gauge companies principally through numbers. (Sisodia, Wolfe and Sheth, 2007:198)

Relationships are also thought to exist between an organisations culture and its leadership, particularly those at the most senior levels (Bennis 1986; Davis 1984; Quinn and McGrath 1984; Schein 2004; Trice and Beyer 1993). Organisational culture can be regarded as the lens through which the content of any workforce development intervention – such as sensitisation training - has to be seen as relevant and constructive and therefore worthy of investment be that time, funding or both. At its core culture can be described as

...the pattern of basic assumptions that the group has invented, discovered or developed in learning to cope with its problems of external adaptation and internal integration, and that has worked well enough to be considered valid, and , therefore, to be taught to new members as the correct way to perceive, think and feel in relation to those problems (Schein, 1986:31).

As Schein identifies, the members of the organisation determine what is valid for them. Personal and collective values come into play when alternative courses of action are evaluated and selected. Values represent notions of what “ought” and “ought not” to be (Sosik 2005) and therefore what assumptions are made and handed on to incoming individuals. Rousseau (1990) suggests that values are perhaps the deepest layer of culture that can be examined and compared empirically.

Goleman (1988:57) describes personal values as:

*.. not lofty abstractions, but intimate credos that we may never quite articulate in words so much as **feel**. Our values translate into what has emotional power or resonance for us, whether negative or positive.*

Goleman regards values as an “inner rudder” and cites a study of knowledge workers where the conscious awareness of its use, in the selection of actions, was shown to enable individuals to deliver optimal performance. This impact of values on personal conduct is echoed by other researchers. Personal values encourage behaviours that facilitate effective interaction within a social setting (Meglino & Ravlin, 1998; Rokeach, 1973; Williams, 1968), individuals will seek to behave in ways that minimise dissonance between their actions and their values/attitudes (Egri & Herman, 2000; Fredick & Weber, 1990; McNeely & Meglino, 1994) and influence the perception of fit between the traits and preferences of an individual and the cultural values of an organisation (Judge & Cable, 1997)

Attitudes, beliefs and values do shape (predict) behaviour. They determine in part the sorts of jobs people seek and shun; those they revel and rebel in; and those where they maybe optimally productive or unproductive (Furnham, 2005: 197).

Person-organisation “fit”, especially when manifest as a high degree of value congruence, is regarded as advantageous to any form of organisation. Research suggests that the benefits of alignment between the values of individuals at all levels of an organisation include reduced employee turnover and increased employee satisfaction and performance (Edwards & Cable 2009; Hoffman & Woehr 2006) and increased trust and cooperation between team members (Tsui & O’Reilly 1989). Perceived similarity in values also increases the likelihood of innovative outcomes as members are likely to feel more comfortable proposing novel ideas (Dose & Klimoski, 1999).

Without delving into values or culture audits per se, many researchers have explored levels of expressed staff “engagement”. The Chartered Institute of Personnel and Development (CIPD) defines engagement as

“being positively present during the performance of work by willingly contributing intellectual effort, experiencing positive emotions and meaningful connections to others” (CIPD, 2013).

A meta-analysis of 199 research studies across 152 organisations in 44 industries and 26 countries, conducted by *Gallup*, showed clear evidence that high engagement positively influences work and organisational outcomes, most notably: customer loyalty, productivity, employee retention, safety, patient safety and quality.

In November 2012 CIPD published the findings of its quarterly Employee Outlook survey. This survey draws upon a sample of the 285,000+ members of the *YouGov* panel and is weighted to be representative of the whole UK workforce. The autumn 2012 survey recorded levels of staff engagement and also asked a set of specific questions around organisational values. The results revealed that almost three quarters of employees believe it is “important” or “very important” for organisations to have defined values that govern employee behaviour. However, only a third of employees believe that the decisions and actions of the executive board of their organisation and the decisions and actions of the chief executive are influenced to a great extent by the organisations values. The two main reasons employees believe values do not influence behaviours and decisions are “profit is placed ahead of organisational values” and “there is one rule for senior managers and another for everyone else”. The survey report concludes

At the heart of an organisation’s culture has to be agreed values that resonate with employees at all levels, from the board to the front line to provide a template for the necessary behaviours and standards expected. (CIPD 2012)

Thus the mission statements that organisations generate in the abstract (and might guide staff selection and operational policies) can lead in practice at times to employees subsequently querying the commitment of those in more senior positions. Put differently estimates of embodied values in organisations are made upwards not just downwards.

The aims and methods of the study

In the light of the above general policy context, and initial empirical findings about prospects for the successful delivery of person-centred support in a policy environment shift towards successful personalisation in practice, this local study utilised the MIR criteria in concert with published espoused beliefs and working values to test out the functioning of *Options*. Those findings are complemented by two other sets of data, the first came from an audit of staff values and the second from a staff survey. This effort at triangulation within the constraints of a short investigation aims to provide a reasonably confident account of the extent to which *Options* as an organisation is putting into practice the ethos of personalisation and person-centred practice, as evidenced by the reported experience of people supported and service providers. Later in the report the lessons that might be extrapolated to other sites of practice are discussed. However, it can be noted here that an aspiration for generalisation from local experience was itself an aim of this study: hopefully, lessons learned from this experience might guide practice elsewhere

The first data set was generated from interviews with disabled people supported by *Options*. An independent interviewer, Gill Goodwin, was commissioned to undertake these interviews and to devise questions and methodology along with authors LB and JLF and a member of the *Options* Leadership team. From what was already known about the operational routines of *Options*, and in the light of the MIR criteria, a mapping exercise was undertaken to cross reference the working values and beliefs of *Options* (appendix No 1) and the 26 'I statements' in MIR (appendix No 2). From this process key topic areas were agreed and questions were then developed to utilise in the semi-structured interviews. In deciding the sample of people to be interviewed, complete randomisation was avoided in order to ensure that people were included who are provided with a range of different support hours and a variety of living situations. Twenty people were therefore semi-randomly selected by two members of the *Options* leadership team, who did not have direct line management responsibility for support workers or team leaders.

The people visited included individuals living alone, with up to, and including, 24 hour support, people living alone in a complex of supported flats and houses with minimal visiting support, and people living in shared accommodation with 24 hour support. Some people had been supported by *Options* for many years and others for a few months only.

The semi-structured interview questions were piloted with four of the people sampled and the research group met again to review the process. Consideration was given at this stage as to how the conversations were unfolding during interview and how best to capture responses.

Within the sample of 20 people, individuals selected had different ways of communicating and some do not use words to speak. In these situations, there was a greater role for the support staff with people at the time of the visit, and therefore the quality of the information gathered was dependent upon on their knowledge of the person supported and their experiences. Given this, it should be noted that information gathered is a snapshot of each person's experience supported by *Options*, sometimes articulated by disabled people directly and sometimes mediated by employees.

Visits to people supported lasted between thirty minutes and one hour and thirty minutes, with most lasting about an hour and fifteen minutes. The variations in length were because some people had little support and shared their views very quickly and, in two situations, because the time spent was enough for them and they indicated that they would like the visit to end. In one situation the person communicated that they did not wish to be involved at all.

Generally, people seemed to enjoy being part of the research and were happy to talk or be with the staff member who was sharing information on their behalf. However, it should be noted that despite many communications having been sent from the *Options* Leadership Team, not all of the people who were visited, or the staff on shift, were aware of the planned visit or, if they were expecting the visit, some were not clear on its' purpose.

Turning to the second data set reported below, one of the authors (JLF) was involved in this study for her particular expertise in a methodology, which has evolved from the Hall-Tonna Inventory of Values (Hall *et al.* 1986). The latter has four main premises:

- 1 Values are an important component of human existence and can be identified and measured.
- 2 Values are described through words.

3 Values are learned and developed through assimilation.

4 Values are modified and shaped by our world-view.

In essence, this methodology is working with core assumptions about human action in context: values are assumed to be an integral part of human existence and they relate to every aspect of life. Values create personal priorities and motivate daily action. Given that social policy is in part about the allocation of resources and priorities that are value-based, then this is then reflected in particular forms of practice; in this case that form is ‘personalisation’.

The Hall-Tonna Inventory contained 125 distinct terms, with specific and separate meanings that described the things that motivated people to act. In 1983 the Inventory was subjected to a range of validation procedures and extensive field testing. A few years later in 1988 after working with Hall and becoming familiar with the Hall-Tonna Inventory, Paul Chippendale and Clare Collins introduced values workshops to Australia. By the early 1990s they had created a computer scored version of the Inventory, which has subsequently evolved into the online tool. Today the overall framework contains 128 distinct energy laden constructs and is referred to as the Minessence Values Framework (MVF).

Initially the tool was called the ‘Australian Values Inventory’ but as its popularity spread to New Zealand, Canada, the US, Spain and now the UK it has been re-dubbed simply ‘A Values Inventory’ – the AVI. To date the AVI has generated 22,087 individual values profiles and no two have been identical. The particular profiles for *Options* personnel are reported in the next section.

Jackie Le Fèvre approached the respondents described in the next section with the following FAQ style of briefing, examples of which include:

“We are doing some work at the moment to take a more detailed look at how we provide support on Wirral. This work is designed to help us describe and explain in greater detail the particular approach that *Options* takes to supporting independent living. Part of the work involves listening to some of the people that we support about the lives they lead and the role that support services play in their experiences. Part of the work will draw together reports and policies published by other organisations that

are active in the field of disability. And part of the work is focussing upon values: the values of *Options* people including support workers, team leaders, managers and trustees. This is where you come in, if you want to. Using a values profiling tool we are hoping to build up a picture of the diversity of values that matter throughout our organisation. We would greatly appreciate it if you would take part in the initial values survey.

Q. What will I get out of doing this? A. You will receive an individual ‘Values at Heart’ report that highlights the seven most important values to you at this point in your life. A. Values are an expression of the things that matter most to us; the ideas that have real meaning and lie behind the things that give us a sense of joy and the things that irritate or frustrate us. Values are the “why” behind the “what” that we think and feel. Knowing “why” helps us spot more opportunities to be happy and manage stressful situations more easily.

Q. Who will see the profile reports? A. Only you and Jackie Le Fèvre, the values specialist working with us on this area. When everyone who wants to has finished working with the tool then Jackie will produce a few shared values reports that simply combine what everybody said and show where there is common ground.

Q. What if I get it wrong? A. There are no wrong answers when it comes to values profiling. Each value is just as powerful, influential and important as any other value. There is no such thing as a “good” or “bad” values profile report. Jackie has worked with over 700 people and this tool in the last seven years and has never seen two identical profiles. Each of is unique in terms of our pattern of priority values. Whatever your values are they are spot on for the person you are and all the things you have achieved.

Q. Is it compulsory? A. No.

Q. Will my line manager be told anything about my results or will the results be used in supervision? A. No. All completely confidential. If you want to share your profile with your manager or colleagues you are welcome to do so.

Q. Does it matter where or when I use the profiling tool – would my answers be different if I was in work or at home, or if it was a good day or a bad day? A. Not really. The things that really matter to us really matter where ever we are and whatever kind of day we are having. It is possible that the exact order of a couple of values might shuffle a little but the overall picture of your Top 7 would stay the same.”

The above question and answer format ensured that the method and motives for its deployment were very transparent to ensure engagement and maximise trust in the process. Note the assurance that individual profiles would not be reported and so the aggregate data instead is reported later in the findings section.

Finally to explore working life at *Options* – particularly the experience of meaning and scope to be “myself” - an online anonymous survey was created. The survey link was distributed to all of *Options* staff within a regular weekly communication. The structure of the survey drew upon research by Rob Goffee and Gareth Jones (published in *Harvard Business Review* May 2013) in which they generated six common virtues of “The Best Workplace on Earth” namely:

- Let Me Be Myself
- Tell Me What’s really Going On
- Discover and Magnify My Strengths
- Make Me Proud I Work Here
- Make My Work Meaningful
- Don’t Hinder Me With Stupid Rules

Goffee and Jones offer a “Dream Company Diagnostic” checklist of 37 statements to investigate where you feel your organisation stands. A four point Likert scale was used inviting staff to rate their agreement with each statement in turn running through Agree a lot, Agree a bit, Disagree a bit to Disagree a lot. The original 37 statements were reviewed by a small group (JLF, LB, *Options* Chief Executive and *Options* Projects Manager) to check contextual relevance for *Options*. Twenty four of the 37 were adopted unchanged. Twelve of the 37 were changed, one statement was deleted and two additional statements were included.

The statements used in the survey can be seen in appendix No 3, changed statements have the Dream Company Diagnostic original wording underneath for comparison.

First data set: the findings from service user interviews

These findings reflect responses about the MIR criteria and so will be aligned with them, step by step, for reader clarity. Extensive rich data were generated by the interviews. For reasons of brevity below, that extensive material is reported in a set of summary bullet points with illustrative vignettes from the independent interviewer then enumerated in the second part of each headed sub-section. The regular prompts for the semi-structured interviews are provided for information at the start of each of the latter.

Names have been changed to protect the anonymity of the respondents.

What was learnt about 'Information and Advice'

1. Do you get information you can understand from *Options*?
 2. How do you get help if you need it about choices and decisions?
 3. What do you do if you want to change or are unhappy about *Options*?
- People supported by *Options* seem to be supported to make as many choices as they can. For some people, this is clear because they are able to tell staff their views. For other individuals, staff knowledge about their communication ability facilitated understanding for the interviewer. There were good examples of this shared approach during visits, with staff explaining, for example, how people are supported to make decisions by being offered a small number of choices to choose from. The interviewer heard how one staff team were aware about the individual usually chose the last thing on any list of choices and how they tried to help that person to make more informed choices by touching fabric, for example.
 - Where people have begun more recently to be supported by *Options*, staff members were offering a range of opportunities to try new foods and experiences, in order to find out what user preferences.
 - People supported by *Options* get newsletters and letters about events. Some people said they could understand these and others require their support staff to share the information with them and explain it.

- Whilst some people said they would feel comfortable talking to staff if they were unhappy with anything, they did not know how to make a complaint or how to contact the relevant service manager.

Here are some illustrations of choice in practice reported taken from the notes of the interviewer.

- Rose and Sarah went to the shop to choose their paint and wallpaper. They wanted a bird pattern to remind them of their budgies. Rose said she felt more confident now and remembered the rollers and brushes.
- Letters from *Options* are written in a way that Carl understands. Carl would speak to the Development Manager if he wanted to change anything but he doesn't know how to get hold of her.
- Shirley gets letters and newsletters from *Options* – she could understand that last one ok. She would like to write something for the newsletter about what her support has been like since *Options* took over. She doesn't know how to complain but she would talk to staff if she wanted to change something.
- Roger chooses what to do – he usually associates the person supporting him with a particular activity and chooses that consistently. Roger makes more choices now that he used to and sometimes just tells people what he wants to do. Staff supporting Roger have to be observant – sometimes he'll say no to something but then change his mind. It is thought that if he at first says no with a gesture to move away then he means no. The staff used to make suggestions for holidays to Roger but since he has been a cruise he has fallen in love with it and now asks to go on cruise holidays – during his last one he was discovered room service and made lots of use of it for tea and cakes.
- Staff show Colin two sets of clothes and he chooses what to wear. Colin doesn't like lots of different food so the staff offer him lots of things to try to find out what else he likes.

- Neil does not use more than a few words to speak – but this is growing. The staff supporting Neil know how he communicates and makes decisions and offer him a choice of three things whenever he has a decision to make. His team are developing a set of photos and other visual cues to help with this. He chooses his own clothes and lets people know if the three choices don't include what he actually wants to wear by pointing to the wardrobe. The team know that they should wait for Neil to make his choice – he'll say yes if he wants to agree to something in his own time.
- Ralph's team make suggestions to him about things he might like to try and he chooses. If he was worried about anything he's speak to the staff – sometimes he puts his fingers in his ears when other people are too loud.
- It could be easy not to hear Cathy's real decisions, when given a choice Cathy usually says the last thing on the list. Staff supporting her try to support Cathy to make real choices – for example, offering her the chance to feel fabric of clothes.

What was learnt about 'Active and Supportive Communities'

1. How do you get out and about and get involved in things? This could be going to the supermarket or post office for example
 2. What happens if you aren't well?
 3. Do people who support you help to think about trying and learning new things or talk to you about work?
 4. If you want to do something in your community, how do you find out and who helps you get involved?
- People who are supported by *Options* seem to generally have busy lives, and take part in a range of activities. Some people attend day centres and some of those people talked positively about this.
 - There are a number of people being supported in their spirituality and attending Church regularly, as well as being part of those communities by being part of Church Clubs or going on trips.

- There does seem to be a drive to seek out new and diverse opportunities for people to get involved in though some are already established favourites. For example, a number of people go particularly like bread making. One house has developed an arts and crafts studio in the garden, which other people supported by *Options* use to make cards. The interviewer was not clear if this because they had tried other classes or groups and then made an informed choice to set up their own.
- The interviewer saw two examples of '101 ideas' folders in people's homes, which provide ideas of things to get involved in or places to visit. Where people have very strong interests, activities and trips are themed around these and people are supported to visit places that are important to them.
- Family connections are encouraged and supported and a number of people see family members regularly.
- When people live in the flats and houses where there is minimal support, many of the activities and work opportunities that people take part in were facilitated by other support providers. Other than this, the independent interviewer met only one person who did voluntary work and one who was in paid employment.

Here are some relevant examples in this section.

- It is not just new activities outside of his home that have been introduced to Neil. He loves being in the kitchen and getting involved with chopping vegetables and he put his own pillow case on his with help from one of his team. The team say that he shows genuine pleasure in little things, like watching someone mowing, washing the dishes in a bowl placed at a table and watching the world from the window. People say that Neil loves being made a fuss of and is at his happiest when having a bit of a game or and likes a 'bit of banter'.
- Roger enjoys getting out and about and is a busy man. He goes swimming twice a week and does arts and crafts. He goes to a bread making class every week. He has been to a course run by *Options* but chooses not to be there when there are a lot of people there. Roger has his own list at the supermarket and fills his trolley with all of the things that are important to him – his supporter puts the rest in for him. Roger's team are always thinking of new things for him to try. They have a book of 101 ideas

that they have put together. Roger rings his sisters and visits them every 4- 6 weeks. The team leader asks them for ideas for things that Roger might like to try.

- Staff ask Rose if she'd like to do new things – she'd love to learn more. She tried cooking a few times but “it was a disaster, I keep laughing about it!” Rose is going to enter *Options* Masterchef though with a new friend she has met through her team leader
- Derek doesn't like doing new things but he will try if he is with other people that he knows – he'll probably just go once though. He loves a party or going out for tea. He loved a recent trip on an adventure holiday.
- Shirley has a really busy week - she likes to keep busy though this is almost all during the day. She gets quite bored of a night and sometimes has a game of draughts with the staff. She has a part time paid job and also does voluntary work. She recently had to be re interviewed for her job and her support staff helped her to prepare so she felt more relaxed at the actual interview. If her week wasn't full she'd ask for a bit of support to set something up but would go on her own.
- Cathy likes the centre that she goes to four days a week. On her day off she likes to go swimming and having lunch out. Cathy visits her Mum on Thursday or Friday every week and takes her biscuits or flowers. She loves having her nails done and baking. She is having a holiday with one of her support staff this year in Spain
- Steven asks to go to the places he likes, these are places he remembers for his past. He is supported by his team to go a day centre part of the week and swims twice a week. He sees his parents regularly. Any new places he goes to are themed around his interest. He even goes to the supermarket and pushes the trolley. He chooses what he wants to buy.
- Neil is trying out lots of new activities so that he can make an informed choice about what he likes to do and is trying things out more than once. He has just been on a train for the very first time , he seemed anxious at first and the support team checked this out with his brother who confirmed that it was a brand new experience for Neil. He

tried again and has loved it since then. If a team member has an idea for something new for Neil to try, the team will research this, including checking out access and equipment requirements, if any. Hel regularly uses an ATM and goes to the supermarket. Neil has recently met and formed a real connection with a woman friend who is also supported by *Options*. The team leader is trying to co-ordinate rotas so that they both have support to go out together and he sees her regularly.

- Mike has a busy week and is supported by people who look out for new opportunities for him to get involved in. He is a regular Church goer, attending every other Sunday and then going to the Church Club after the service, as well as going to the monthly Saturday Club at Church. Mike sees his niece and talks to her on the phone and sometimes she supports him to go to Church. Mike is involved in contributing to charity – he was about to do a bag pack to raise funds for *Options* adopted charity of the year. Mike really likes going to a local day centre. He hasn't been as many days as he would like recently as he has been unwell but this is being gradually built up again. Mike's team look out for new opportunities for him to get involved with – he has a great love of dancing and has recently started going to a monthly Western night. The support team bring ideas to the team meeting and there is an ideas box in the house of things to do.
- Louisa's friends are hugely important to her. Seeing her friends makes her happy and she spends a lot of time with them, visiting them and going into town with them. Every Sunday, Louisa goes to Church and sometimes goes on trips with the Church community. She goes to the social night at different clubs a couple of times a week.
- Ralph goes to a day centre 4 days a week and then has a day off each week to get out and about. This week he is going to look for a new car but he usually goes shopping and for lunch – he likes going to the ferry too. Ralph goes to the bank for his money and has tried the supermarket but it isn't really something he enjoys. Ralph just enjoyed a holiday to Blackpool. He goes to some clubs in the evenings, he sees his girlfriend at one of them and they went for a meal for Valentine's Day. He has tea at another friend's house too. Ralph sees his brother every other week and together they visit their Auntie.

- Neville has a van and a scooter to get about. He will often go to the shops in his scooter and bring his shopping home in the basket. Some weekends Neville goes sailing – there is a hoist now at the West Kirkby. He likes having days out. He used to horse ride and might start again if he loses some weight. Neville sees his dad every week – his dad comes to him on a Saturday and Neville visits him too.

- Geoff loves being out and about, he is active man. His holidays and days out include trains and trams, his big interests, and he likes to go for walks and to cafes. He doesn't readily like to try to new things but if supported to try something gradually he might find something he enjoys – this is how he started to go swimming which he now does twice a week. He also goes to a bowling club once a week and sometimes to another two evening clubs. Geoff is getting a new car soon - staff supporting him say he is at his happiest when he is out and about. He sees his brother and is in touch with some of his relatives, he meets up with his aunties now and again.

What was learnt about 'My Support My Way'

1. Do you have a person centred plan or ELP?
 2. How are you involved in writing it?
 3. Do you have meetings about it, to check how things are going? What are they like?
 4. Do your support staff ask you what you like to do?
- The interviewer met people who had an 'Essential Lifestyle Plan' (ELPs) but were not aware of this fact or could not recall it. This was particularly the situation where people have minimal support and these individuals also shared that they did not have reviews of their support. The interviewer was told that people do have ELPs and that they are in the office but she was surprised that the individuals were unaware of this fact.
 - People who have significant levels of support may not always be involved fully in planning or aware of it. Staff seemed to be clear that some of the information in the ELP, therefore, is a 'best guess'.
 - ELPs are reviewed and sometimes people who are supported go to Team Meetings.

- In some situations family members had contributed to ELPs and reviews and had shared information.
- Whilst not all people may be aware of having an ELP, this does not automatically mean that their support is not delivered in a person-centred way. A plan is not an outcome but rather a means to understand what is important to and for people and how best to support them. Here are some relevant examples in this section taken from the notes of the interviewer.
 - Geoff does as much as he can around his flat – his support staff members try to enable him to what he can instead of doing things for him. They are guided in this by Geoff.
 - Carl has a health passport which the team leader helped him with. He thinks that he probably has an ELP but couldn't recall it. He doesn't have a meeting to review things but different staff will ask him how he is getting on.
 - Roger goes to Team meetings but usually just stays for half an hour and then goes to the park for a bit – he has an ELP but it is mostly a best guess.
 - Louisa didn't know about her Essential Lifestyle Plan but does have one and it is kept in the office. She wasn't sure if she has been involved in a review of it.
 - Shirley hasn't seen an ELP and hasn't had a review for a long time. She would like one.
 - Colin doesn't have an ELP yet but people are writing down what they learn about what he does and doesn't like
 - Martin has an ELP. His brother shares stories of Martin's early life and together with Martin, his brother and sister go to his reviews. Martin goes to some team meetings and is involved in meetings and planning for anything new
 - Neville didn't know that he has an ELP. He has plans for next year though that people know about. He wants to lose weight, meet new people and carry on getting out in his van

- Louisa can call the support worker who is on site from her flat when she needs them and they may also give a knock on her door to check all is well.
- *Options* took over Neil's support with little warning. When new staff were introduced to Neil this was carefully considered and were moved around if they didn't seem a good match for Neil.

What we learnt about 'My Support Staff'

1. Are you involved in choosing your staff? How do you do that?
2. Are your staff good? Why? Why not?
3. Do your support staff come when you need or want them to?

- People spoke positively of being involved in staff recruitment and some had attended workshops. Staff seemed to have a good knowledge on the whole of the right sort of people to support the person and, where people themselves were not able to be involved in recruitment, are aware of the need to be observant to any signs that the person they support is not happy with a supporter. The interviewer heard of staff being moved because they were not a good match.

- Generally, people who answered this question were happy with their staff and shared the reason for this with the interviewer.

- During the visits the interviewer witnessed some good support and met staff who seemed to know the people they support well. In the view of the interviewer support was evident and genuine and staff members were clearly very respectful of the person they support and their home.

Here are relevant examples in this section.

- Roger's staff know that is important to him to be independent – he makes his own breakfast and lunches and has help to make anything trickier than sandwiches and support him by cooking with him and encouraging him to do as much as he can.

- Rose was involved in recruitment workshops and thought they activities were “great, building stuff”. She was looking for people who really wanted the job and “want to help us live our lives on a daily basis – eager, willing and who have compassion”. Rose “couldn’t ask for better staff, they make us happy and we tell them our troubles”. “When I’ve felt down, staff are there to help me through”
- Carl wasn’t involved in choosing his staff. Carl gets on well with his support staff. He said they are good staff because they help him with tasks and problems with homes, like when the freezer was broken. If Carl was worried, talking to his staff would be “the number one priority”. Staff help when there is “mail to be filed and medicines to be booked in”. If Carl needs support with anything other than his regular cleaning etc., he books it in the diary. This could be going to the hospital for blood tests as it is helpful to have staff for appointments like that. If he isn’t well then the staff check on him.
- Roger doesn’t get involved in choosing his staff but his team leader or one of his team should represent him on interviews. He won’t say if he doesn’t like someone but the support staff who know him well are usually able to tell, though this sometimes is a best guess.
- Jess doesn’t get involved in choosing staff and it can take a while for new staff and Jess to get to know each other. Recently people felt Jess wasn’t getting on well with a team member so that person moved to support someone else.
- Shirley was involved with a workshop about choosing staff- it was good, there were lots of different activities. She doesn’t want to be involved in interviews. Shirley’s staff help her to budget and she says she would get into debt if they didn’t help with this. She used to get ‘red letters’. If she feels “down in the dumps” she feels comfy talking to the staff. One of the staff is helping Shirley with a healthy eating plan .Staff text her to see if she wants help with tea.

- Recently a volunteer has started to support Mike and the other men who share their home together. Mike didn't choose him but the new volunteer came to meet people before he started coming to the house.
- Louisa wasn't involved in choosing the most recent new member of staff but some of her neighbours who had already met him asked for him to be part of the team.
- Martin loves to chat to people – he is a real people person. He goes to recruitment workshops and will let people know if he doesn't get on with any new staff.
- Cathy has been involved in choosing staff – she wanted to know if they liked hot chocolate. The team leader asks Cathy what she thinks of people. Cathy says she likes one person because they “take me swimming” and another because “we are going on holiday”
- James does talk to the staff but would like more time “to talk about worrying thoughts” James said that staff are “good at listening to me” but also said one “hasn't got a lot of patience” .James is “managing to get some thoughts about feeling happy”.
- Neville says he has “got good staff who sit and listen to me, are kind with me and helpful to me”. He'd feel comfy talking to them if he was worried about things or if he wasn't getting on with someone new. It is important that new staff know how he likes his boots and callipers to be put on.
- John can ask to book in support in the diary if he has an appointment and also has some regular support on a Thursday. If someone else has an appointment on that day it may mean he has to change his support time. If the staff member hasn't written clearly in the diary then it could mean he doesn't get support from a relief staff – if it says “John – shopping” instead of “support for John to go shopping” for example. Having support each day to make his tea works for John
- Roger's staff know that is important to him to be independent – he makes his own breakfast and lunches and has help to make anything trickier than sandwiches and support him by cooking with him and encouraging him to do as much as he can.

What was learnt about 'Feeling in Control and Safe'

1. Do your staff help you plan for what you want in the future?
 2. Do you feel safe supported by *Options*? Why? Why not?
 3. What happens when you are not well or something else that is different happens?
- Some people who are supported by *Options* use assistive technology to help them feel safe and this seems to work well. The interviewer met one person to whom safety was hugely important and learnt that this was understood by the staff; the person was supported in this matter and his concerns were acknowledged.
 - Where people have had, or are due to have hospital admissions, the interviewer heard about staff being with the person during their stay, with plans being made for recuperation before an admission, to reassure the person.
 - The independent interviewer met some people who were hoping to move house or have a change of living arrangement. In one case this was because the person wanted to move to a ground floor flat with a garden, in another it was support staff recognising that a move to another flat would bring new opportunities for the person to have things that are important to him. The independent interviewer also heard of one situation where the people who live together struggle to do so. The staff team seemed to be actively supporting people in this as far as possible, given that much of this is beyond their influence as a direct support team.
 - Planning for the future does happen but this seemed to be focussed mainly on holidays or trips.

Here are some relevant examples in this section.

- Carl has a bed monitor because of his epilepsy and this helps him to feel safe – he generally does feel safe.
-
- John does feel safe supported by *Options*. There is a number to call other staff who are supporting people locally if they are needed overnight, but if that person hasn't got a car they don't come out. John is worried about becoming more independent. He

thinks he may get less support then and he still feels that he needs it – when he is doing things around the house his ” mind wanders”. If he is able to do everything himself he is concerned that it will mean he has to move from his flat.

- Shirley feels safe, she gets on well with the staff and knows they are there. She is having an operation soon and has already talked to the staff about her recuperation. Last time she was in staff visited her there.
- Mike was unwell recently and had a stay in hospital. He had one of his support team with him every day until the end of visiting or until his niece came to see him. He had lots of visitors including staff who used to support him and friends.
- Feeling safe at home is hugely important to Neville. He has a safe and a house alarm. Once a week Neville and the staff member check all of the smoke alarms together. Staff know what Neville needs to happen in order to feel the house is safe before he goes out and follow this. Neville likes staff to look after his money and keys when they go – some of the team wear clothes with zipped pockets so that Neville knows his things are safe. When he went on holiday he had people round to check his house and Neville rang to make sure everything was ok. If he needs assistance during the night he has a buzzer to let people know. If Neville isn't well the staff make his appointment for him at the doctors and go with him but he goes in by himself.
- If Louisa isn't well she's let the support worker on duty know, if she needed the doctor they would make an appointment for her and go with her.
- Derek has been having some difficulties with his housing – his support staff are arranging some advocacy support for him
- Ralph says that one of his housemates “makes me unhappy, noisy” and his other housemate stands in front of the TV when Ralph is watching it. Staff say this is being looked at it as it isn't a good match of people in the house.

- Roger's team have noticed that Roger loves fireplaces – he always stops outside shops to look at them. A flat has come up nearby with a wall that could accommodate a fireplace so plans are going ahead for a move.

What was learnt about 'My Money'

1. Do you or your family know how much your support costs?
 2. Does someone explain to you how that money is spent?
- The interviewer did not meet anyone who knew what their support costs were in detail. A small number of people know they get a bill from Wirral Council, how much that is and that they pay it usually by Direct Debit.
 - Whilst most people get support to manage their finances and this ranges from advice and help to budget to full support, staff teams appear to try to give people as much opportunity as possible to have much control as is possible. This can mean people handing over cash in the shops, adding unplanned things to the trolley at the supermarket, going to the bank and having money to spend in their pocket when they go out.

Here are some examples relevant to this section.

- Everyone knows Derek in the bank. People say hello to him and the person supporting him stands at a distance. When he goes to his club he has his £5 and decides what to spend it on.
- Neville likes to count his money and sorting out his receipts. He has just picked up a new van. This is really important to Neville and it mattered a lot to him to get the right one. He has been strapping his wheelchair in to his van himself and “ is made up” [this is local vernacular meaning to be very pleased or happy]
- Carl gets charged for his support. He knows how much he pays to the council.

- Roger has tried to look after his money but it works best for him to have lots of support with this. He does go to the bank to get his money.
- Shirley has a budget plan and is control of what is left over. She pays for her Sky and is going to start saving – she doesn't want to waste it. She'd love to save up to see 'Dancing on Ice' on tour. Shirley has "no idea" how much her support costs.
- When Steven goes to his club he has his own money and buys what he likes. He likes buying dvds when he goes to places. He spends some money on cruises – he goes on two short ones a year.
- Louisa gets a letter once a month about how much she has to pay for her support – she isn't sure what the cost is and takes the letter to the office.
- Geoff has a list for shopping but often adds things he likes the look of at the supermarket – like magazines. Staff manage his money for him but he hands over the cash in the shops.
- Ralph keeps some money in his wallet and chooses what he wants to buy. He likes to buy raffle tickets at one of his clubs.
- Cathy doesn't go to the bank – her team leader staff looks after her money for her
- At the shops, Rose hands over the money to buy things. She gets her money form the bank and counts it, works it out and puts it in the safe. She hasn't used an ATM yet but would like to – she'd like to learn new skills

Second data set: the values profiles

A staff cohort of 87 individuals was identified to be offered the opportunity to take part in the values profiling element of the study. These 87 were selected on the basis that they each play some part in the delivery, design, management and leadership of the services that support the 20 disabled people who were involved in the first data set above. During the course of June 2013 all trustees and selected staff received a number of communications about the values tool which was available for use online 24/7. All trustees completed the values profiling. Overall 56% of the selected staff cohort completed the values profiling. The 55 profiles completed breaks down as follows:

6 from 6	Trustees
9 from 9	Leadership Team
10 from 10	Team Leaders
30 from 68	Support Workers

For the purposes of this report the data are presented in two subsections, one related to the Top 10 values evinced by *Options Staff* and the other relate to a Culture Field Map.

Top 10 shows out of the 128 distinct human values contained within the MVF which ten were front of mind and the priority order of those ten for that individual or group at the time that the AVI tool was completed. Values exist in a dynamic relationship with our underpinning beliefs about the world and our lived experience of how things work out in practice. As such both the priority order and actual composition of the Top Ten is amenable to change over time.

Culture Field Map shows extent of motivational energy emanating from the underlying pattern of prioritised values (developed from Tosey and Smith 1999 – work on learning organisations). The highest scoring dimensions are the principle forms of energy we “radiate”: this impacts upon how others see us and seek to understand our words, and actions and it influences how and with whom we build rapport.

The AVI is a forced choice ranking instrument which offers users multiple opportunities to prioritise any of the 128 values. The tool takes typically 40-50 minutes to work through. It is

often completed in one sitting although individuals do have the choice of taking a break and returning at a subsequent time should they prefer.

The background to the AVI – Values Profiling Tool is provided in appendix No 4 of this report.

Prior to working through the tool individuals were advised that there is no such thing as the right or wrong set of values. No one value is any better or worse than any other value. Results of the profiling were confidential to the individual and the values researcher. Individuals were free to share results with others if they wished to but there was no expectation or requirement for them to do so. At no point were the results of individual profiles to be used in performance management or supervision activities within *Options*. Upon completion of the tool individuals received a gift token from *Options* in appreciation of their participation.

Comparison of Collective Top 10 Values within Options groups

Within both workplaces and less formal settings people have a tendency to socialise towards a set of shared values that represent those abstract ideas that are collectively prioritised by the members of the group. The following table (Table 1) shows the highest shared values for groups of people who fulfil the same role within *Options* as revealed by the AVI.

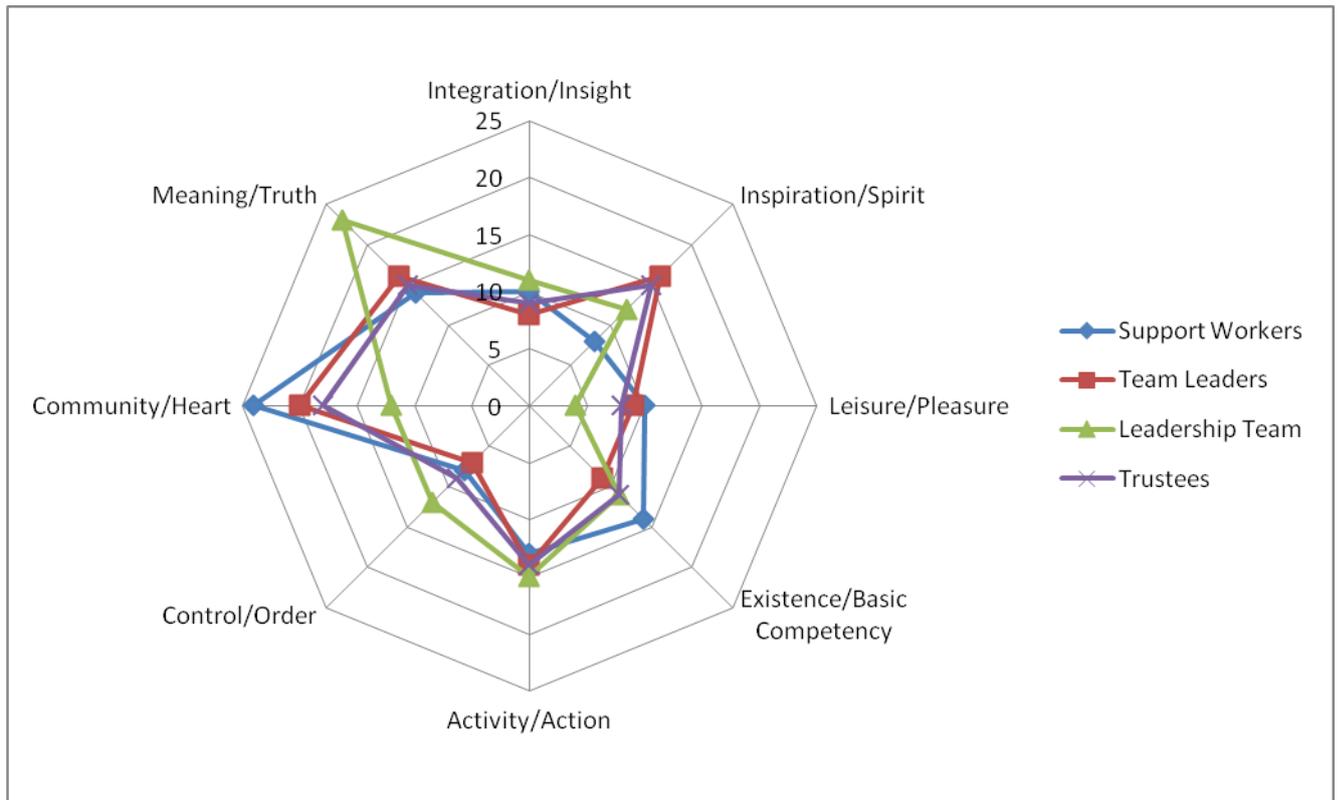
Table 1

TRUSTEES n=6	LEADERSHIP n=9	TEAM LEADERS n=10	SUPPORT WORKERS n=30
Human Dignity	Human Dignity	Human Dignity	Human Dignity
Human Rights	Faith/Risk/Vision	Equality/Self Determination	Care/Nurture
Family/Belonging	Self Competence/ Confidence	Equity/Rights	Human Rights
Leadership/New Organisation	Organisational Growth	Sharing/Listen'g/Trust	Equity/Rights
Equality/Self Determination	Work	Faith/Risk/Vision	Equality/Self Determination
Pioneerism/Progress	Accountability/Ethics	Leadership/New Organisation	Rights/Respect
Care/Nurture	Organisational Mission	Rights/Respect	Hospitality/Courtesy
Equity/Rights	Collaboration	Being Self	Being Self
Faith/Creed/Worship	Management	Limitation/Celebration	Family/Belonging
Self Worth	Congruence	Human Rights	Empathy

Each value in the Minessence Values Framework has an equal random chance of appearing somewhere in a Top 10 list – a 1 in 12.8 chance. For the same value to appear in more than one list, especially in a specific position in more than one list, the chances are much smaller – 1 in 128 for one list, 1 in 128 to the power 2 for two lists, $(1/128^2)$ and so on. The probability of Human Dignity appearing at the top of the list for all four groups of people is 1/128 to the power 4. Appendix No 5 contains a list of the descriptors of the values present in Table 1.

Culture Field Maps Comparison

Taking the data sets for each group the following chart shows the results as a Culture Field Map. The map uses the collective priorities for each group across eight dimensions that relate to different forms of motivational energy for example Leisure/Pleasure is concerned with fun and play while Activity/Action is concerned with excellence and achievement.



There is real coherence between the subcultures operating at each level within the organisation with some small variations between different roles.

Support Workers show the highest emphasis on Community/Heart which is predominantly concerned with open and honest relationships between people. Support Workers also place greater priority upon the practical skills, resources and infrastructure required to do the job – Existence/Basic Competency – than the other three groups.

Leadership Team members show the highest emphasis on Meaning/Truth, which is predominantly about developing and communicating a shared set of beliefs and values. Control/Order which is concerned with structures, roles, plans and goals, is a higher priority for the Leadership Team than for the other three groups.

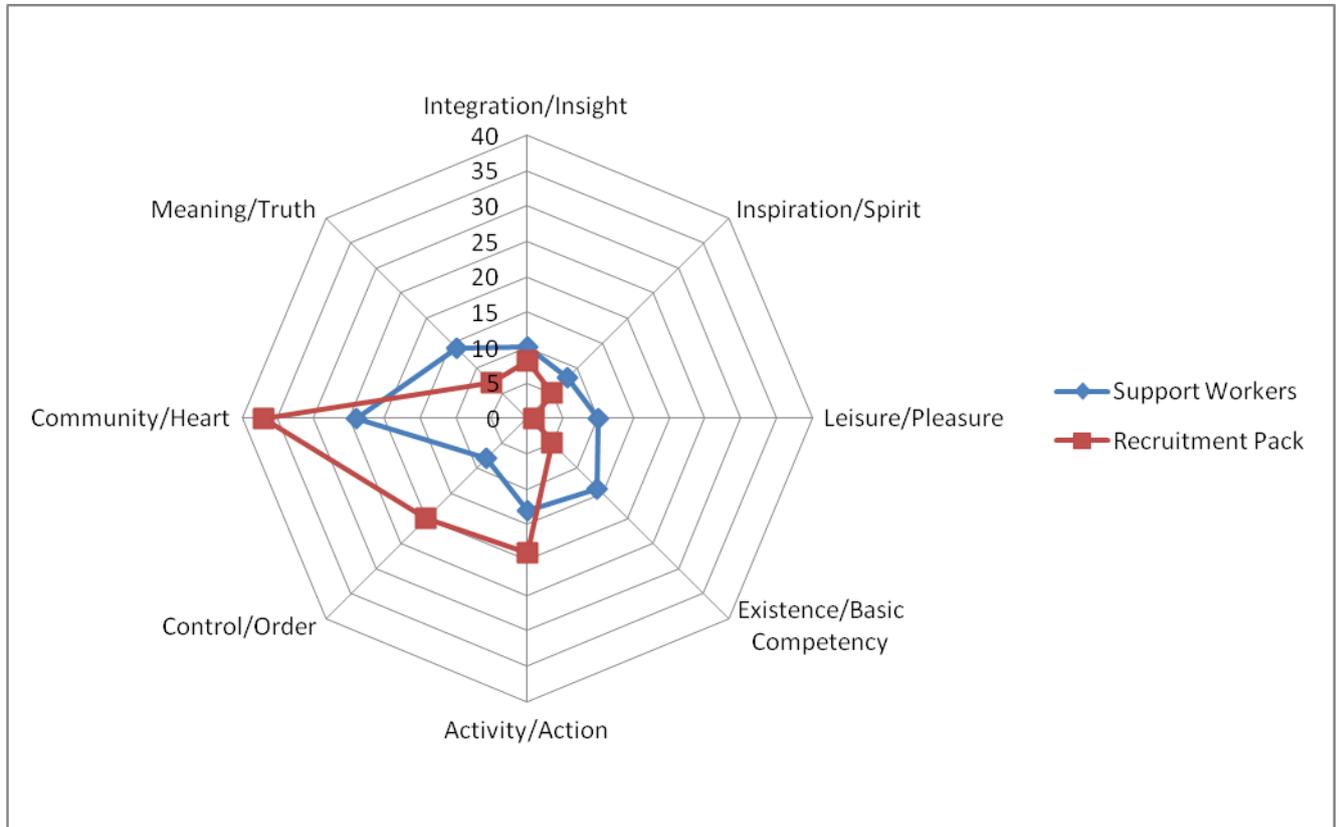
Trustees and Team Leaders share the highest score on Inspiration/Spirit which is concerned with the overall vision for organisation and the nature of the services delivered.

Espoused Values v Lived Values

Whether explicitly or implicitly all organisations convey information about values within their written communications. Values information influences both how the organisation is received by the reader and the way in which the reader then responds to the organisation. For example we know that people unconsciously evaluate how much “like me” or “not like me” a job vacancy appears and then decide whether or not to apply. People are most likely to apply for something that comes across to them as being a “good fit” for their sense of self. For all organisations this makes accurately describing work and the expectations/opportunities contained within any job role an absolutely fundamental step in finding the right people.

Using ValScan™, which draws upon the same values framework as the AVI tool, we analysed the values being communicated by the copy used in the most recent *Options Support Workers Recruitment Pack*.

The following chart shows a comparison between the Cultural Field Maps of the Support Workers Recruitment Pack and the collective priorities of 30 serving *Options* Support Workers.

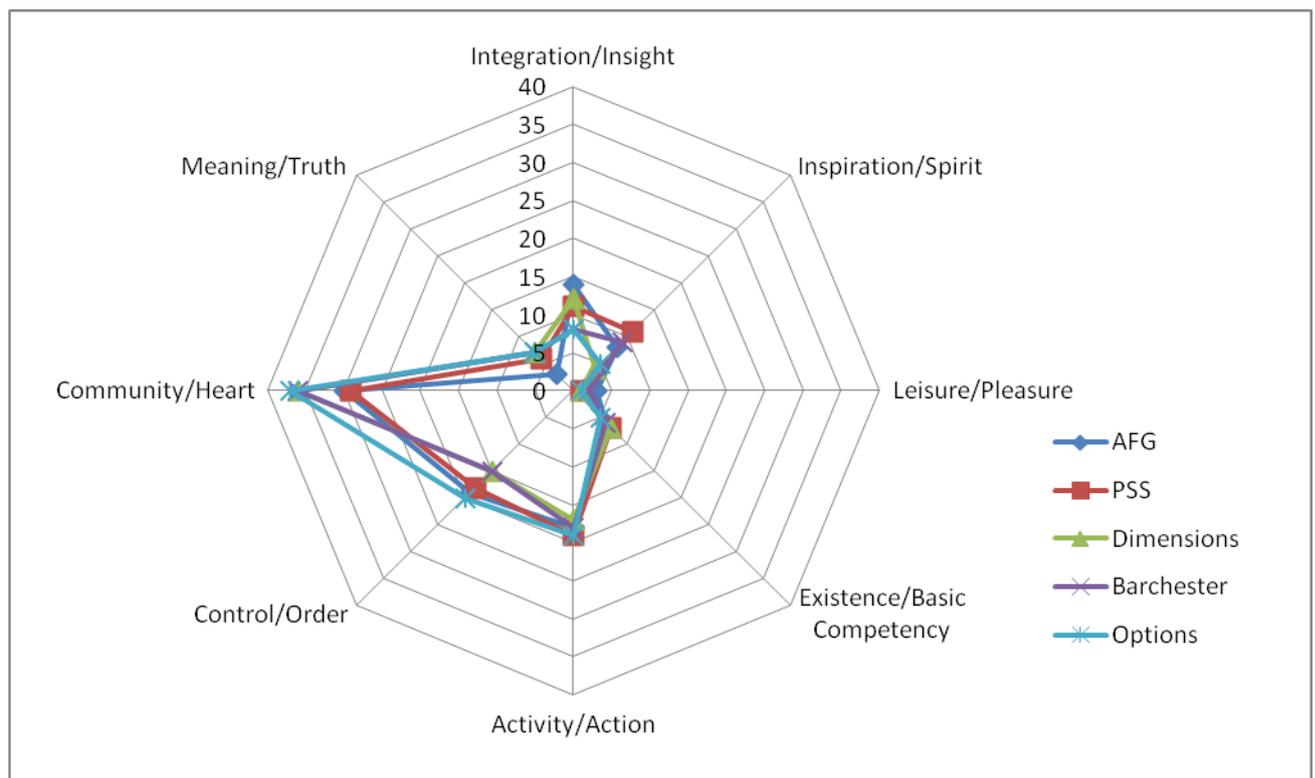


In essence what the materials say they want – people who care, have a heart for others, want to get the job done well – is predominantly what we find prioritised by the people currently in post.

In developing future methodology it will be interesting to compare this chart with the profile of a group of new recruits or shortlisted candidates. This could enable us to explore the extent to which “cultural fit” is there from the outset or the extent to which fit develops over time. Cultural fit may for example develop due to socialisation within the peer group of support workers and/or the personal experience of the support workers as they contribute to and witness the richness of the lives of the people supported.

Comparison with other Social Care Providers recruitment materials

The following chart shows results based on a sample of webpages associated with advertising Support Worker equivalent vacancies plus one page of more general organisational information such as “About Us” or “Our Ethos”. The comparison with *Options* is not a like for like as more extensive source materials were made available for *Options* and in the case of other organisations analysis was restricted to information in the public domain.



What this snap shot shows is that the majority of the core communication about employment as a Support Worker contains very similar values threads across a selection of different provider organisations.

So it would appear that many providers are in effect broadcasting the same invitation and are likely therefore to be attracting similar populations of raw recruits. This raises a question that brings us back to the impact of culture: is it what happens to the Support Workers once they are recruited by *Options* and experience the degree to which espoused values are actually being lived that shapes practice and therefore the lived experience of the people supported?

Comparing the shared priority values of the three groups of *Options* staff – Leadership Team, Team Leaders and Support Workers – to the descriptions of the twelve *Options* Working Values we found a high degree of alignment as shown in the table overleaf. Where a listed MVF value appeared in more than one group top ten list the number of times it was prioritised at that level is shown in brackets e.g Human Dignity (x4). Full list of *Options* Working Values in appendix No 1.

Table 3 - Options Working Values vs MVF Values present in Group Top Ten Lists

Options Values → MVF Values ↓	Integrity	Commitment	Enabling	Confidentiality	Challenge	Listening	Recognition & Encouragement	Rigour	Teamwork	Learning	Vision	Risk Taking
Accountability/Ethics				√	√			√				
Being Self (2x)	√											
Care/Nurture (2x)		√					√					
Collaboration			√						√			
Congruence	√											
Empathy						√						
Equality/Self Determination (3x)	√	√	√				√		√			
Equity/Rights (3x)				√								
Faith/Risk/Vision (2x)											√	√
Family/Belonging (2x)		√										
Hospitality/Courtesy				√		√						
Human Dignity (4x)		√	√			√	√		√			
Human Rights (3x)		√										
Leadership/New Organisation (2x)		√						√				
Limitation/Celebration			√				√			√		
Management								√				
Organisational Growth										√		
Organisational Mission											√	
Pioneerism/Progress										√		√
Rights/Respect (2x)				√	√	√						
Self Competence/Confidence			√				√		√	√		
Self Worth			√				√		√			
Sharing/Listening/Trust						√			√			
Work		√										

Work on 'The Value of Value Congruence' by Edwards and Cable (2009:672) suggests that when both individual and organisational values match at high levels an environment which fosters communication and trust is the result: possibly the kind of environment where the following feedback might be given.

I have only joined the organisation a few weeks ago, but in all my long experience of working in this field, I have never been so impressed by the quality and approach to new employee training and the Managers and Team Leaders and the very friendly atmosphere in the organisation that I keep saying to my family and friends, this is an Excellent Organisation and run with True Professional and Friendly welcoming approach to all its staff and people we support : Many thanks to all the Training Staff and my fellow Workers. (Unsolicited email received from an Options Support Worker June 2013)

Options is governed by a board of six trustees who, alongside the Leadership team, set and monitor the effective implementation of the organisational Development Plan. Over the twenty years since it has been operating *Options* has had many organisational challenges but the core of the Development Plan has always been to deliver person centred support and has always recognised the need to provide staff with continuous training and opportunities to ensure that choice and control is present in people's lives. The recent funding cuts and constraints within Social Service contracts create significant pressures on budgets. In order to mitigate against the negative impact this has on people supported and on staff *Options* approached this in recent years by investing resources in developing and delivering training programmes and sharing back office functions with other like-minded organisations; has looked to the Charity's reserves to consider where they would be best deployed in alignment with the organisation's aims and values; and has sourced additional sums of external funding to ensure better opportunities and outcomes in the lives of people supported and to continue investing in staff development.

Third data set: the Staff Survey

All 343 *Options* staff were invited and encouraged to take part in an online survey. There was a fortunate coincidence of timing for triangulation in this report: an interdisciplinary working group had earlier in the year identified the potential benefit of a staff survey. The survey was “live” for four weeks, during which time 122 people took part, representing a response rate of 36%. This response rate created a confidence level of 95% and a confidence interval of 7.13%. This means that answers given by the respondents are likely to be true of the whole staff population +/- 7.13%. For example, in response to “I value what we stand for” 88% said they “agree a lot”, from which we can be 95% confident that for the whole staff between 80.87% and 95.13% of people would agree a lot with the statement.

Headline findings from the survey

Results aggregated for the six common virtues expressed in percentage terms were as follows:

	Agree a lot	Agree a bit	Disagree a bit	Disagree a lot
• Let Me Be Myself	56.55	28.01	11.1	4.30
• Tell Me What’s Really Going On	47.73	31.91	14.48	5.89
• Discover and Magnify My Strengths	43.33	41.43	11.83	3.42
• Make Me Proud I Work Here	79.10	17.30	2.74	0.86
• Make My Work Meaningful	71.55	22.77	4.65	0.98
• Don’t Hinder Me With Stupid Rules	48.65	32.28	14.18	4.88

These figures suggest that virtues, to do with the “work” and “values/meaning”, are attracting very strong positive scores, compared to the virtues that focus more on organisational processes, such as information flow/availability. As Goffee and Jones observe in their HBR Online article:

Yet, few, if any, organizations possess all six virtues. Several of the attributes run counter to traditional practices and ingrained habits. Others are, frankly, complicated and can be costly to implement. Some conflict with one another. Almost all require leaders to carefully balance competing interests and to rethink how they allocate their time and attention.

Mindful of that careful balance and that there is competition/tension between the six virtues, the following results are of particular note in terms of the degree to which different *Options* Working Values are being reflected in the lived experience of staff:

	Agree a lot	Agree a bit	Disagree a bit	Disagree a lot
<i>Options</i> Vision value				
I know what we stand for	84.6	12.8	2.6	0.0
I value what we stand for	88.0	11.1	0.9	0.0
At work we share a common cause	64.4	27.1	6.8	1.7
<i>Options</i> Challenge value				
Passion is encouraged, even when it leads to challenge	60.8	27.5	9.2	2.5
It's not disloyal to criticise constructively	64.7	21.8	8.4	5.0

In May 2011, the CIPD published research data looking at the locus and levels of engagement for employees across a range of sectors. In terms of engagement with the job or work, which could be regarded as analogous with the virtues of Make Me Proud I Work Here and/or Make My Work Meaningful, researchers found that 18% of employees were “strongly engaged” and 68% were “moderately engaged”. This compared to the over 70% of those who “agree a lot” and “17-22%” agree a bit for *Options* people. In terms of engagement with the organisation (values/purpose) the CIPD research found only 11% of employees expressing high affinity with their organisation and 57% moderate affinity. This compared to the scores above on “I value what we stand for” for *Options* people of 88% “agree a lot”, 11% “agree a bit”.

Discussion of the findings

Overall, the findings provide us with a strong endorsement of the *Options* service ethos in practice. Not only do the personal accounts of service users confirm the presence of the service characteristics we would reasonably expect from a service adopting a positive approach to personalisation, the values profiles of the service providers hint strongly at the reason for this general user satisfaction. Results from the staff survey suggest that most employees across *Options* are actively engaged with their work and the purpose of their organisation pointing to the presence of an effective workplace culture shaped by deliberate values. There indeed seems to be a firm alignment between the stated ethos of the organisation and the practical experience and enactment of that ethos by staff.

In the light of the general endorsement of that ethos by people supported, we can consider three main learning points that might be relevant for any new or existing service which aims to support disabled people in a person-centred manner on a routine basis. First, what do the sub-optimal features of the service tell us, even within a picture of global user endorsement? Second, how might we account for the values evinced by the staff? Third, what contextual features need to be taken into account, when guiding other organisations, based upon the *Options* version of personalisation and person-centred care to date?

On the first main point we can note that the service offered to people was very good but (inevitably) imperfect. The independent interviewer for the first data set noted that whilst people supported were being given opportunities for aspirational choice and control over their lives, not all the respondents within the 19 visited were always fully aware of (and by implication in charge of) their own ELPs. It would seem that more could be done by *Options* to make improvements in this regard and to ensure that every effort is made to enable individuals to be central to the development and updating of the plan. More could be done as well to ensure that staff teams regularly refer to the plans alongside people supported. The interviewer notes that: 'If an individual is unaware of what is in an ELP or it is not kept alive, it is very difficult for them to know who is supporting them with actions and by when.'

On the second point about positive staff values, these were bound up with the ways in which *Options* selected its workforce, declared its own organisational values and then married and maintained these in routine practice. The study only directly explored the extent to which those staff teams, connected with the sample of 20 disabled people supported, shared priority values that resonated both with one another, and with the espoused values of the organisation. However, the staff survey gathered views from more individuals not connected with the Wirral study than from staff connected with the study and revealed

very high levels of engagement, suggesting that the level of values resonance demonstrated by the selected cohort of staff would also be present across the rest of *Options*.

This positive success replicates the findings of recent reporting of personalisation in *locally chosen user-centred organisations*. Williams *et al.* (2013) studied three pilot sites in England, taking personal accounts of 80 users of support planning and personal budgets. They found that:

In general, satisfaction with user-led support planning revolved around respectful styles of facilitation, good listening skills and the expertise brought by the experience of disabled people themselves. However, it was found that different styles of support planning were effective for different people, depending on several factors relating to their life experience, the length of time they had been disabled, the availability of family support and their connection with other disabled people. Whether social services or voluntary-sector staff are facilitating support plans, we conclude that some people need more help initially with support planning than others, and that a good model should differentiate and be flexible, to allow people to move towards independent planning at their own pace.(Williams *et al.*,2013).

The emphasis on flexibility and service ethos were evident in the *Options* data provided in the findings section above. These points also prompt the next consideration which is about organisational context.

Turning to the context of the findings, two factors stand out. The first is the small enabling organisational setting of *Options* and the second is the extant funding that provides a level of support for the generally positive outcomes reported by its service users. *Options* has been a deliberately and consciously values-based organisation since its inception. Two of the trustees have been on the Board for over 15 years and the current iteration and structure of the organisation's Working Values has been in place for 10 years in parallel with the current *Options* CEO. As a consequence, there has been a period of relative internal stability in terms of the values prioritised and what they mean in practice. This is likely to have facilitated the embedding of a culture that allows staff to trust in the mission and aims of the organisation, and to engage meaningfully in helping shape the daily delivery of person-centred support and future organisational direction.

A number of factors might shape the successful culture of this organisation that can be listed here for consideration. People supported by *Options* take part in the recruitment of their support staff and give presentations at recruitment workshops. Sweets are included in the recruitment packs that are sent out. *Options* operates a relatively flat structure with the CEO having a strong physical presence within the

organisation, including involvement at recruitment workshops - delivering training, meeting with families, and attending Team Leader meetings. Development Managers and Team Leaders have limits on the hours of support they manage, probably far lower than other, larger, social care delivery organisations. This may help to ensure that an emphasis can be placed on building relationships with people supported and staff teams. There are budgets in place to allow for individuals and teams to be thanked for 'going the extra mile' in supporting someone. There are dedicated posts for Inclusion and community engagement and volunteering. Future research could explore further these factors and the extent to which they form part of the 'culture fit' between person and organisation.

Options has a reputation amongst people supported, and their families and carers, of delivering on what they say they will. This is evident in some of the unsolicited communications from families of people supported during the transition from local authority delivered support. These communications were reviewed at the early stages of the research and whilst the content of these was very positive and affirming of the findings from the independent interviewer, it was not felt that the scope of the research could expand upon this area sufficiently to gain a comprehensive perspective. As we continue our work to develop our organisational learning, this will be addressed after consulting on how best to proceed with both a regional Family Forum and with the National Valuing Families forum.

Some commentators who have been sceptical about personalisation have highlighted vulnerabilities in the policy. For example, Brookes *et al* (2013) point out that the persuasive advantages of the ethos of personalisation emerged under the auspices of the previous government before the current and prospective trend of austerity measures. The latter are now impacting harshly on local authorities. With resource shrinkage it might be that new criteria are imposed from above which, for example, stifle local innovation and might be limited primarily to risk management (rather than maximising quality of life). Similarly when putting more recent attempts at personalisation in the longer context of community care initiatives since the 1990s Ellis (2013) concludes that in statutory settings:

Despite the promise of revalorising adult social work as a means of supporting people accessing social care to secure greater control over outcomes, it is concluded that there is little to discourage the perpetuation of conservative and defensive practice on the front line of personalisation. (Ellis, 2013: online April 21st)

In other words a statutory setting plus fiscal constraints are not a propitious context for realising the authentic aims of personalisation. Moreover, if those austerity measures impact upon local authority budgets available to commission the type of service endorsed by Williams *et al* (ibid) above, then the prospects of sustaining the gains achieved by organisations like *Options* will rest upon income generation and maintenance.

At the time of writing, the relationship between the constraints and obligations of third sector and statutory sector settings in relation to the prospects for the success of the policy of personalisation is summed up here by Miller and Larkin (2013) in a very recent review of personalisation:

Personalisation looks set to provide the binding narrative for social care services in England for the foreseeable future. This study reveals that there is a general consensus across the public and third sectors regarding the basic principles that lie behind personalisation, their potential to be a force for improvement within carers' services, and the need for a whole systems change. Where consensus ends is in the parts of the system which are most in need of change and who should be trusted with the limited resources available to achieve personalisation. Put simply, is it local authorities that are out of step and therefore should trust the third sector to use its carer-centric values and governance arrangements to determine what support is required and how best to deliver this? Or are some parts of the third sector only responding to a small proportion of the current carer population through traditional services and therefore a consumer led approach is required to incentivise them to demonstrate innovation and efficiency? (Miller and Larkin, 2013:20)

Finally in relation to contextual factors we can consider the principled objections that emerged in the literature when personalisation emerged as a policy priority over 5 years ago. At its best (and the findings in this report suggest that the *Options* service is tending in that direction in practice) personalisation maximises individual choices. However this may isolate those very individuals from collective support in two senses. First, and especially now in times of increasing financial retrenchment for local authorities, budgets allocated for collective services, where social capital might ensue (such as day facilities), are likely to diminish or even disappear. Access to relevant funds from the NHS may also vary from place to place depending on the variable outcomes now possible with the new Clinical Commissioning Groups and Health and Wellbeing Boards. Certainly prior to 2008 the division between health and social care budgets undermined the functioning of personal budgets (Glendinning *et al.* 2008). Whilst joint commissioning of services by local authorities may now heal that division, whether it actually does in practice remains an open empirical question at the time of writing.

Second, the individualisation inherent to personalisation as a process might sever links with collective new social movements (in this case the disability movement), as well act as a diversionary agenda about structural inequalities. However, such criticisms also merge with the professional interests of social workers, which are also at stake, as this summary from Ferguson (an academic social worker) made clear when personalisation was being kick started under ‘New Labour’:

Within a very short space of time, the concept of personalization has come to occupy a central place within dominant social work and adult care discourses within the UK.... this popularity is due primarily to its congruence with key themes of New Labour thought, including individualization, responsabilization and the transfer of risk from the state to the individual.....given its acceptance of the marketization of social work and social care, its neglect of issues of poverty and inequality, its flawed conception of the people who use social work services, its potentially stigmatizing view of welfare dependency and its potential for promoting, rather than challenging, the deprofessionalization of social work, the philosophy of personalization is not one that social workers should accept uncritically. (Ferguson, 2007: 387)

These anxieties about the policy direction, in principle, about personalisation reflect a contradictory picture. On the one hand it was driven ideologically by radical demands from the disability movement itself (about choice, citizenship and self determination). On the other hand, its radical individualism in practice threatens to sever links with its collective roots. That ambiguity means that it finds advocates across the political spectrum but those on the left harbour doubts about its shortcomings (Needham, 2011). The wholesale realisation of the benefits of personalisation can be queried in a current social service context of austerity in which: statutory duties are prioritised; a gap between needs and resources is growing; and the social work workforce is being cut back. These are wider considerations that form a context not just for the work of *Options* but any other organisation out with the statutory sector pursuing a personalisation policy in practice.

Our findings from this study have prompted two of the authors (LB and JLF) to begin work on a specific new methodology for triangulating the lived experience of people supported; staff supporting people; and the organisational culture through which support is shaped and delivered.

As recently as July 2013 the potential for research to contribute to improving both outcomes and achieving value was being explored jointly by academics and local authority Directors of Adult Social Care. Writing about the Social Care Evidence in Practice project for ADASS (Association of Directors of Adult Social Care Services) Knapp (2013) states:

Evidence-informed practice can lead to better decision making, improved outcomes for individuals, greater confidence when making long-term investments and planning decisions (such as housing with care schemes), and stronger leadership and management. There are significant ways in which research and practice can work collaboratively to improve outcomes for social care.

Our case study of a social care provider is a practical example of how, even within a relatively short period of time, research and practice can come together to generate new insight of value both to the organisation participating in the study and the wider social care community.

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Appendix 1 *Options* Espoused Working Values

1. Integrity
We seek in our actions, in what we do, to reflect what we say and believe. We say what we mean and we mean what we say.
2. Commitment
We work hard to enable people we support to achieve their goals. When the going gets tough we stick in there. But we are also committed to balanced lives. As we seek full lives for the people we support, so we seek to ensure staff do not work excessive hours and have time for themselves and others outside of work.
3. Enabling
We support each other to develop our skills and abilities and to use them effectively for the benefit of those we support. Therefore we don't jump in to do everything ourselves, but look to developing and using the skills of others.
4. Confidentiality
We share specific, private information on a "need to know" basis and within supervision systems. We do not gossip about others and we do not create negative reputations for people we support.
5. Challenge
We rigorously debate our differences of opinion and see such debates as healthy and positive. Once a decision is made, we work wholeheartedly towards the agreed decision.
6. Listening
We listen to each other and don't jump in with our own views before considering others. This reflects our respect for each other.
7. Recognition and Encouragement
Appreciation and encouragement are great motivators. We seek to identify opportunities to praise and encourage each other and we celebrate success.
8. Rigour
We act and make decisions on what makes a real difference to the quality of life of those we support. When necessary we take hard and painful decisions about making sure *Options* works effectively.
9. Teamwork
We recognise each other's different skills, experiences and abilities and seek to use each to work as a team and support each other in good and bad times.
10. Learning
We are creative and try different ways of doing things. We make mistakes, but after they occur we learn from them to ensure they do not happen again.
11. Vision
We have a clear sense of purpose and direction
12. Risk Taking
We are willing and keen to take thought through risks and make sure we learn through every experience, the good and the bad.

Appendix 2 Making it Real – Markers for change - ‘I’ Statements

Information and Advice. Having the information I need, when I need it.

- I have the information and support I need in order to remain as independent as possible.
- I have access to easy to understand information about care and support which is consistent, accurate, accessible and up to date.
- I can speak to people who know something about care and support and can make things happen.
- I have help to make informed choices if I need and want it.
- I know where to get information about what is going on in my community.

Active and supportive communities. Keeping friends, family and place

- I have access to a range of support that helps me to live the life I want and remain a contributing member of my community.
- I have a network of people who support me - carers, family, friends, community and if needed paid support staff.
- I have opportunities to train, study, work or engage in activities that match my interests, skills, abilities.
- I feel welcomed and included in my local community.
- I feel valued for the contribution that I can make to my community.

Flexible integrated care and support. My support my own way

- I am in control of planning my care and support.
- I have care and support that is directed by me and responsive to my needs.
- My support is coordinated, co-operative and works well together and I know who to contact to get things changed.

Workforce. My support staff

- I have good information and advice on the range of options for choosing my support staff.
- I have considerate support delivered by competent people.
- I have access to a pool of people, advice on how to employ them and the opportunity to get advice from my peers.
- I am supported by people who help me to make links in my local community.

Risk enablement. Feeling in control and safe

- I can plan ahead and keep control in a crisis.
- I feel safe, I can live the life I want and I am supported to manage any risks.
- I feel that my community is a safe place to live and local people look out for me and each other.
- I have systems in place so that I can get help at an early stage to avoid a crisis.

Personal budgets and self-funding. My money

- I can decide the kind of support I need and when, where and how to receive it.
- I know the amount of money available to me for care and support needs, and I can determine how this is used (whether its my own money, direct payment, or a council managed personal budget).
- I can get access to the money quickly without having to go through over-complicated procedures
- I am able to get skilled advice to plan my care and support, and also be given help to understand costs and make best use of the money involved where I want and need this.

Appendix 3 Options Staff Survey

Thank you for taking part in this initial Options staff survey.

Please read the statements and decide, based on your experience of working as part of Options, how much you either disagree or agree with the statements.

The statements are organised into six sets under key headings:

Let Me Be Myself

Tell Me What's Really Going On

Discover and Magnify My Strengths

Make Me Proud I Work Here

Make My Work Meaningful

Don't Hinder Me With Stupid Rules

The survey is anonymous and everyone is encouraged to take part.

Response scale Agree a lot Agree a bit Disagree a bit Disagree a lot

Let Me Be Myself

- I'm the same person at home as I am at work.
- I feel comfortable being myself.
- We're all encouraged to express our differences.
- *Quirky people can thrive here.
(Orig. People who think differently from most do well here.)
- *Passion is encouraged, even when it leads to challenge.
(Orig. Passion is encouraged, even when it leads to conflict)
- More than one type of person fits in here.

Tell Me What's Really Going On

- *The truth is not hidden from us.
(Orig. We're all told the whole story)
- Information is not spun.
- *It's not disloyal to criticise constructively.
(Orig. It's not disloyal to say something negative)
- *My manager wants to hear news whether it is good or bad.
(Orig. My manager wants to hear bad news)

- *The Leadership Team and Trustees want to hear news whether it is good or bad.
(Orig. Top executives want to hear bad news)
- *Communications are open and honest.
(Orig. Many channels of communication are available to us)
- I feel comfortable signing my name to comments I make.
- **Peoples ideas and suggestions are listened to.
(Supplementary question)

Discover and Magnify My Strengths

- I am given the chance to develop.
- *Each employee is given the chance to develop.
(Orig. Every employee is given the chance to develop)
- *Options attracts stunning people to work here.
(Orig. The best people want to strut their stuff here)
- The weakest performers can see a path to improvement.
- Compensation is fairly distributed throughout the organisation.
- *People around here work to help one another.
(Orig. We generate value for ourselves by adding value to others)

Make Me Proud I Work Here

- I know what we stand for.
- I value what we stand for.
- *Making money is not our overriding goal.
(Orig. Profit is not our overriding goal)
- I am accomplishing something worthwhile.
- I like to tell people where I work.
(Deleted question I want to exceed my current duties)

Make My Work Meaningful

- My job is meaningful to me.
- My duties make sense to me.
- My work gives me energy and pleasure.
- I understand how my job fits with everyone else's.
- Everyone's job is necessary.
- At work we share a common cause.

Don't Hinder Me with Stupid Rules

- We keep things simple.
- The rules are clear and apply equally to everyone.
- I know what the rules are for.
- Everyone knows what the rules are for.
- We, as an organisation, resist red tape.
- *I trust and respect the decisions that Options takes.
(Orig. Authority is respected)

And finally to close two quick questions:

Are you

- a member of the leadership team
- a team leader
- a support worker
- admin

Have you used the online AVI tool as part of a piece of research looking at our work on Wirral

- Yes
- No
- Not sure

Thank you for taking the time to feedback your experience of working as part of Options.

*Denotes a changed statement from the original Dream Company Diagnostic

** Denotes an additional statement for *Options* context

Appendix 4 Background to the AVI

How our understanding of values has developed in the last 40 years or so owes a great deal to the work of three men Paulo Freire, Ivan Illich and Eric Fromm. In the 1960's they were working in South America seeking to enable local communities to perceive the social, political and economic forces that were at work in their environment – often not for the better. Freire called this process “conscientization”.

Freire and his colleagues became interested in the power of energy laden language to motivate people to tackle new challenges. This work on language was then picked up by Brian Hall, who in the 1980's together with Benjamin Tonna, developed the Hall-Tonna Inventory of Human Values. The Inventory contained 125 distinct terms with specific and separate meanings that described the things that motivated people to act.

Between 1974 and 1980 Hall and Tonna led seminars and explored their values theories extensively across Europe and America and conducted preliminary testing of the Hall-Tonna Inventory of Values. In 1983 the Inventory was subjected to a range of standardisation and validation procedures. A few years later in 1988 after working with Brian, and becoming familiar with the Hall-Tonna Inventory, Paul Chippendale and Clare Collins introduced values workshops to Australia. By the early 1990's they had created a computer scored version of the Inventory which has subsequently evolved into the online tool in use today known as “A Values Inventory” – or the AVI.

There are two principle approaches to surfacing and profiling values.

The *normative* approach takes sets of items or statements and asks respondents to rate the extent to which they endorse the ideas expressed. This creates a situation in which an individual can be high or low on any or all of the values contained in the instrument. This form of data is amenable to a wide range of statistical analyses. The data is also, however, vulnerable to bias based upon perceived social desirability.

The *ipsative* or “forced choice” approach asks respondents to prioritise one single value at the expense of others in a list. This creates a picture of absolute differences between values. As values are regarded as residing in the unconscious, many researchers regard accurate value measurement as requiring assessment in a choice situation (Fallding, 1965; Kluckhorn, 1951; Locke, 1991; Williams, 1968; 1979).

Ipsative scores are therefore believed to more closely represent an individual's true values, rather than his or her public endorsements or socially desirable statements. Furthermore, as previously noted, some researchers maintain that values are hierarchically structured based on their relative importance to an individual. Because ipsative methodologies ultimately yield a rank ordering of values based upon importance, they are believed to more closely duplicate the way values are cognitively held by individuals. (Meglino and Ravlin, 1998: 361)

The AVI is an example of an *ipsative* instrument.

Appendix 5 Minessence Values Framework Descriptors for *Options* Priority Values

Descriptors are presented in alphabetical order.

Accountability/Ethics - To hold yourself and others accountable to a code of ethics derived from your principles.

To address the appropriateness of your behaviour in relation to living your values.

Being Self - The capacity to be authentic in all situations.

Care/Nurture - To be physically and emotionally supported by family and friends and to value doing the same for others.

Collaboration - Working cooperatively with a common purpose, sharing responsibility and accountability.

Congruence - One's words, actions and deeds are in alignment with espoused beliefs. (Walk the talk. Practise what you preach.)

Empathy - To deeply relate with others in such a way that they feel understood.

Equality/Self-Determination - To appreciate the equal value of all people and everyone's right to be their own person.

Equity/Rights - Acting in ways which demonstrate and encourage the fair and equitable treatment of all people

Faith/Creed/Worship - Expressing my religious faith through commitment to its creed, teachings and practices.

Faith/Risk/Vision - To commit to a vision, cause, or to champion a way of life, even if it means significant personal risk.

Family/Belonging - Having a place or sense of home. To be devoted to people you consider family and to experience belonging and acceptance.

Hospitality/Courtesy - To treat others, and be treated by them, in a polite, respectful, friendly and hospitable manner.

Human Dignity - The basic right of every human being to be respected in ways which enable them to develop their full potential.

Human Rights - To create a global society where all people have access to resources such as food, habitat, employment, health care and a minimal practical education, as their basic right.

Leadership/New-Organisation - Leading/developing a new organisation or transforming an existing one so as to benefit the organisation, its people and society

Limitation/Celebration - To recognise that your limitations are a natural part of exercising your talents. To have the ability to laugh at your own shortcomings.

Management - To control, delegate to, and direct people in order to achieve optimal productivity and efficiency.

Organisational Growth - To creatively enable an organisation to change and grow.

Organisational Mission - To define and pursue an organisation's mission in such a way that the organisation is beneficial to its people and society.

Pioneerism/Progress – Pioneering new ideas (including technology) for societal change and providing the framework for realising them.

Rights/Respect - To respect the rights and property of others as I expect them to respect me and mine.

Self Competence/Confidence - Confidence that you have the skills and abilities to achieve personal and professional goals.

Self Worth - To know that I am respected and esteemed by those who are important in my life.

Sharing/Listening/Trust - To actively and accurately hear and sense another's thoughts and feelings. To express your own thoughts and feelings in a climate of mutual trust.

Work - To have the skills, confidence and desire to engage in productive work.

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