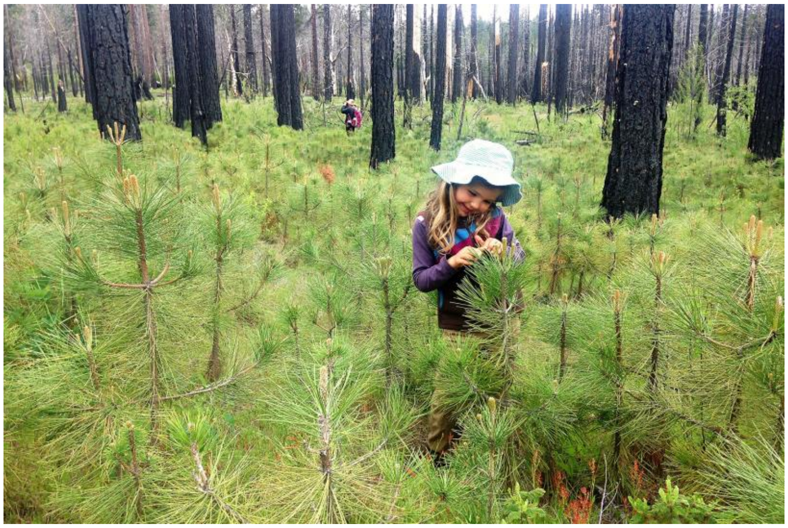

BUSHFIRE RECOVERY FINANCIAL COUNSELLING PROFESSIONAL NETWORKING WORKSHOPS FRAMEWORK AND CHECKLIST

This framework outlines the basic components of a series of workshops for bushfire financial counsellors to develop in collaboration and partnerships with a range of bushfire recovery support agencies.

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FCVic
Financial Counselling Victoria Inc.

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SUMMARY

This framework outlines the basic components suggested for workshops that will develop the relationships and potential for collaboration between bushfire financial counsellors and other support agencies relevant to the bushfire recovery effort. This is likely to include local and state government agencies and specialist services dealing with issues such as family violence, mental health and legal support, as well as indigenous and generalist social support agencies.

The framework incorporates a checklist you can use to develop and roll out collaborative workshops that will assist the bushfire recovery effort in your area. You will find that the key steps in the checklist are not necessarily sequential. They may well overlap as you put them into practice. The focus is on the development of a series of on-line workshops that help both network different community support workers and help them to identify effective and client focused ways of working together.

The framework is derived from a model developed by FCVic as part of its bushfire response. The model underpinned the timely delivery of a series of professional networking workshops by FCVic following the 2019-20 bushfires. The workshops were customised for each of the two regions most affected by the bushfires in Victoria - East Gippsland and North-East Victoria.

The framework emphasises a community development approach. This begins with the process of research into the agencies to target, the key issues in the area to focus on, and the most appropriate speakers to discuss those issues. This is the beginning of the process of building the collaboration and partnerships between financial counselling services and other services and organisations that support the bushfire recovery effort.

The community development approach and the design of the workshops themselves also acknowledges that many support workers will not have a deep understanding of what Financial Counsellors do. It also builds on the awareness that people working in the bushfire recovery space are often new to their roles and may have been personally affected by the bushfires.

The effectiveness of the approach in Victoria was underpinned by the credibility of the peak body FCVic. This credibility assisted the organisers to gain participation in the preparatory research. It also facilitated gaining agreement to participate in the workshops themselves by both panellists and attendees in a short space of time.

The Appendices include tools FCVic utilised which you may find useful to use as templates.

STEP 1. ESTABLISH THE PURPOSE OF YOUR WORKSHOP

Create a clear and concise outline setting out:

- the purpose of the workshops
- the key objectives
- the intended audience
- the proposed delivery format and process
- the intended duration.

A short outline of no more than one page will support both the process of seeking the participation of agencies and presenters in the development and delivery of the workshops. It will also be crucial to the marketing or advertising the workshops. Appendix 1 is the overview developed by FCVic for its workshop series that you can use as a template.

FCVic presented a series of three workshops customised for each of the two regions of Victoria affected most by bushfires in 2019-20.

Workshop #	Focus
1	Introducing the role of financial counsellors and fundamental financial capability concepts
2	Collaborative working between financial counsellors and case support workers
3	How to recognise and respond to special needs

The purpose of the workshop series was to give support workers a good understanding of what Financial Counsellors do, and ensure Financial Counsellors were clear about the work of other key agencies they would need to collaborate with. In addition, it was to ensure not only a good overview of problems bushfire survivors were likely to present with. The intent was also to ensure that the different types of workers each had a good understanding of how best to collaborate to ensure effective referrals for their clients. This is important given that people working in the bushfire recovery space are often new to their roles and sometimes also new to the geographic area they are now working in.

STEP 2. DECIDE THE PRIMARY AUDIENCE

The geographic coverage for the bushfire recovery effort will determine the appropriate financial counselling agency or agencies to target for the workshops.

It will be very important to work closely with these agencies in the design and development of the workshops. Remember that following a bushfire or other disaster many communities are likely to strongly prefer the involvement of agencies and people they consider to be locals in the recovery effort and may resent people who do not have this local or other relevant ‘lived experience’.

Once you have determined who the target audience is it will be important to engage with key staff in the relevant agencies in the development of your workshop program. This consultation cannot start too early. It may for example include collaboratively determining the appropriate dates and times for the workshops.

In addition, it is important to ascertain who are the generalist social support agencies the local financial counsellors work with or could benefit by working with,

Remember there will also be indigenous support agencies that provide services to the area. Indigenous clients may be less likely to seek help from mainstream agencies and this will be a good time to strengthen the links with those agencies.

Also think about what specialist agencies deliver services clients will need. Specialist agencies to consider are likely to include rural financial counsellors, agencies dealing with family violence, community and other legal advice services, as well as the mental health support organisations that provide services to the area.

Within generic agencies there are often specific bushfire recovery support workers. They will be a key part of the audience you seek to engage.

STEP 3. CONSIDER FORMAT

Consider how long your workshop needs to be. Consider a workshop or workshop series of no more than 90 to 120 minutes each. Take into consideration that while training and networking is vital, people working in bushfire recovery are likely to feel pushed for time.

Online workshops need to balance the range of issues to be covered with the need for interactive sessions to hold people's attention and reinforce key messages. To achieve this, it is best to limit the number of presenters. In addition to allowing for questions after each presentation, you may want to set time, say half an hour for a panel discussion of questions from participants.

The desire for interactive workshops also means that you may want to utilise online meeting formats rather than webinars. Many people find formats that allow all attendees to see each other are more engaging than those that do not. This is manageable for quite large meetings (e.g. up to 100 people). Similarly, whether you use a meeting or webinar format the workshop will be more engaging if you allow participants to unmute themselves to ask their questions direct. Allow for the extra time this will take up.

STEP 4. SET THE WORKSHOP DATES

Once the dates for the workshops have been set circulate the one-page outline of the workshop to the agencies that are your intended audience.

Ask your target agencies to circulate the outline amongst their staff and encourage them to register so that you have an idea of your participants ahead of the date and can undertake more promotion as required. A more complete agenda for the workshops can be provided closer to the date with an event reminder.

STEP 5. DETERMINE THE WORKSHOP TOPICS

To determine the precise themes to be covered in your workshop it is imperative that you are informed by a good understanding of:

- The sociodemographic makeup of the population that will need support such as particular household groups, indigenous and ethnic populations, age groups
- The range of issues and information that will be useful for financial counsellors to provide to other support workers. For example, information about dealing with insurance, hardship policies of utility companies, negotiating with banks regarding debts and mortgages, identifying or being aware of financial abuse,
- The reasons for the higher incidence of family violence in disasters and that this is something all bushfire recovery workers need to be able to identify.
- That mental health issues are likely to be prevalent amongst both clients and workers. Workers need to be aware of the potential for vicarious trauma and how to get support to deal with this. Remember that some workers will themselves have been personally affected by the bushfires.
- The importance of culturally appropriate service provision.

A community development approach will help ensure that the design and the development of your workshops is well informed. As indicated in Step 2 this begins with the process of research into the agencies to invite. Using the 'snowball' research technique will also help confirm the key issues in the area to focus on. This approach involves initial contacts nominating other potential contacts through their networks, who could potentially contribute.

As noted above you might start by consulting the key agencies delivering financial counselling services that are active in your target area, If there is a strong, well-resourced social support agency such as the Red Cross or Anglicare or the local council they are likely to have a designated bushfire coordinator. You may find it useful to work closely with them in developing the workshops and identifying the presenters and networks that will be most useful to your target audience.

Appendix 2 provides templates you can use for ideas to develop your workshop agendas and running sheets.

STEP 6. CONFIRM YOUR SPEAKERS

Sorting out the key topics to be addressed in the workshops can take some time. The good news is that you can usually identify the most appropriate speakers to discuss those issues at the same time using the same snowball approach.

This can involve referrals and discussions with several different people before you identify the most appropriate presenter on a specific theme. While time consuming it is the beginning of the process of building the collaboration and partnerships between financial counselling services and other services and organisations that support the bushfire recovery effort.

STEP 7. LIMIT THE PRESENTATIONS AND USE CASE STUDIES

It is important to be clear with the presenters what you want and to confirm that by email including the date by which you want their slides – say three to four days before the workshop. This helps ensure you have them before the event, can suggest changes if required, and can easily compile a consolidated set that can be sent to attendees after the workshops.

Just as it is recommended you limit the number of presenters in a workshop, it is also suggested that you ask presenters to use only a small number of slides, say three or four. This is another way of helping keep presentations to time and promoting more time for discussion. It also allows for any glitches with technology.

Case studies are useful to communicate key messages. They can also show how agencies can collaborate to resolve a mutual client's problems. Encourage presenters to use them. Some services have also developed checklists to help you determine when to consult with them. These and other tools can be highlighted in the workshops and distributed afterwards.

It is important that presenters provide you with referral information and access points that can be sent out afterwards if not provided during the workshops, Participants may find a consolidated list of contacts particularly useful.

STEP 8. REMEMBER HOUSEKEEPING

Ensure your workshop facilitators are familiar with the meeting or webinar platform you are using. Ask the presenters to link in early so that you can introduce them to each other and sort out any connection issues.

Be prepared for presenters and audience members having trouble with connecting or unfamiliar with the technology and have someone available to assist other than the facilitator(s) of the workshop.

It can be helpful to divide up the facilitation tasks. For example, one person might be responsible for introducing the presenters and assisting them with any issues and another might manage the chat and or Q&A function. Take note of any queries or information that needs to be followed up and circulated after the workshop.

At the start of each workshop provide some housekeeping such as instructions on how participants can rename themselves, use the chat and or Q&A functions, how to mute or unmute and so on. This ensures that those who are less familiar with your online platform feel included from the start.

It is also useful to begin with icebreakers such as asking people to use the chat function to identify what agency they work with, where they are linking in from, what they are keen to learn about in the workshop, and even what the weather is like where they are right now. At the end of or during the workshop if there is a lull in proceedings for some reason you can also ask people to type in the chat box what key learnings they will be taking away.

STEP 9. AFTER THE WORKSHOP FOLLOW-UP INFORMATION

If you have asked attendees to register as suggested in Step 4 you will have the email contacts for all attendees.

You can circulate the presentations and any other information provided by presenters after the workshop including referral contact points for all organisations involved.

You can also send out any further information provided by the presenters or sourced following queries by the participants at the workshop. This could include web links and details of other organisations that can assist with the bushfire recovery

Information should be circulated within a week of each workshop.

STEP 10. EVALUATE AND ANALYSE TO INFORM FUTURE WORK AND COLLABORATION

You might want an evaluation of each workshop or one for the workshop series. At the very least you will want to know what participants found most useful, least useful, what topics they would like to know more about and what would most improve your workshop.

If you have not provided an immediate link to an evaluation survey at the end of the workshop you could circulate the link with the information sent after the workshop.

A general rule of thumb is that responses are more likely the faster the request for feedback is made. SurveyMonkey is a simple, free and easy to use tool for evaluation purposes.

Appendix 3 provides a template you can use to develop your own evaluation survey. It is suggested you invite your presenters along with all other attendees to complete the survey.

Analysis of your workshop evaluation responses will help you determine ways to improve future workshops. Along with comments and questions raised during the workshops themselves, the evaluation analysis will also help you to identify areas or themes for future work and collaboration.

This might include issues requiring advocacy or areas in which professional development for financial counsellors might be useful. It might also include the need for further online workshops or other activities to strengthen the networks your workshops have established.

Bushfire Recovery Financial Counselling Professional Networking Workshops Checklist

Action	Agency organisation/details	Done
Step 1. Establish your workshop purpose		
Step 2. Decide the primary audience		
Step 3. Consider format		
Step 4. Determine the workshop topics		
Step 5. Set the workshop dates		
Step 6. Confirm your speakers		
Step 7. Limit the presentations and use case studies		
Step 8 . Remember housekeeping		
Step 9. After the workshop follow-up information		
Step 10. Evaluate and analyse to inform future work and collaboration.		

Appendix 1. Concise Outline Of The FCVic Professional Networking Workshops April 2020

Purpose of the Workshops

To facilitate the development of an efficient and effective referral process and collaborative working relationship between case support workers and financial counsellors and rural financial counsellors and potentially others e.g. legal/psychological support/Family Violence services that recognises the needs of, and provides relevant effective support for, people and communities affected by the bushfires.

Objectives

Ensure all case support program workers have:

- an understanding of the different roles of case support, case management, generalist and rural financial counselling
- an understanding of good practices in relation to assessment, referrals and working together for effective client support
- opportunities to build working relationships particularly in the light of COVID virus imperative to have minimal face to face contact but rather to work remotely .

And that financial counsellors and rural financial counsellors have:

- an understanding of multiple non-financial issues their clients and or their families may be experiencing,
- an understanding of services their clients may need to assist with non-financial issue and how best to work effectively with these services

Intended audience

Bushfire case support workers, their team leaders and managers 1800 workers, Indigenous case support workers and managers in East Gippsland and the North East.

Bushfire financial counsellors, their team leaders and managers to attend to encourage alliance building and developing collaborative processes for triage, assessment and referrals.

Proposed delivery

Three workshops of no more than 1.30 hours for each region (East Gippsland and North East Victoria) .

Online Streaming via zoom (or similar) will allow the workshops to be interactive. However, they may be recorded so that agencies can utilize them as webinars post the live workshops. During the livestream presenters will be supported by a co-facilitator managing the chat function. Participants will be encouraged to make comments in the textual chat function, polls as well as opportunities for verbal Q&A moderated by the co-facilitator. .

PowerPoints with key points, case studies or scenarios will be provided for each topic covered in each workshop

Delivery late April to early May .

Appendix 2. FCVic Professional Networking Bushfire Recovery Workshops Running Sheets

WORKSHOP ONE -RUNNING SHEET THE ROLE OF FINANCIAL COUNSELLORS AND FUNDAMENTAL FINANCIAL CAPABILITIES			
Topic & Content	**Presenters**	**Time**	**PowerPoint**
Set Up Participants invited to log on at least 5 mins before session starts to set up their computer systems	9.20 Bev & Meredith & Tanja Set up PowerPoint Check Chat and Q&A settings 9.25 panellists join check videos microphones		
1. Welcome & introduction *Welcome to Country* Purpose and Outline of the session: The Webinar Process Recording; Attendees on mute; Raise issues during presentations via Q&A, can have verbal discussion discussion if their computer speakers are OK – Meredith will manage this Ask people to state via the chat function where they are logging in from e.g. home or office & geographic location	**10 mins** • Sandy Ross • Bev Kliger	**9.30 am**	3PowerPoint
1. *Roles of financial counsellors:* a. generalist financial counsellors (FC) b. rural FCs. Include a discussion of what is seen as the role of a) generalist case support workers b) Indigenous case support workers and Indigenous workers other than FCs	**40 Mins** a. **Margie Tickner** Upper Murray b.**Chris Howard** Ag Biz Assist c.**Jarryd Williams** Gateway Health Bushfire recovery program manager Gateway Case d. **Amy Green** Indigenous case support	**9.40 am** 10 mins presentation Include questions after each 10 mins questions & discussion	PowerPoint At minimum lots
2. *Basic financial capabilities:* basic information regarding financial matters a. Update on grants available for individuals and communities, bushfire related and general b. Update on hardship policies, for example for energy companies and banks c. Basic insurance information including other sources of help on insurance matters *(e.g. CALC)*	**40 mins** **Anglicare** Tracey Grinter **Sandy Ross** FCVIC for CALC - insurance	**10.10 am** 15 min Tracey 5 mins Sandy 20 minutes discussion	PowerPoints lots
3. Summary of Key Messages of the Workshop Noting any questions that require follow up Key Issues raised in the Webinar	**10 mins** Bev Kliger	**10.50** am	1 PowerPoint with contact details
Finish			**11.00 am**

WORKSHOP TWO - NORTH EAST COLLABORATIVE WORKING PROCESS BETWEEN FINANCIAL COUNSELLORS AND CASE SUPPORT WORKERS			
Topic & Content	**Presenters**	**Time**	**PowerPoint**
Set up *Panellists* invited to login least 10-5-mins before session starts to set up their computer systems		**9.20 am**	
1. Welcome & introduction Purpose: To assist understand how best to work with each other and make referrals to meet clients' needs *use chat where they are logging in from e.g. place & location*	**Sandy Ross** EO FCVic Joint facilitators **Bev Kliger** **Meredith Carter**	**9.30 am** **10 mins**	3 PowerPoint
2. ***Assessment and Triggers for Referrals between CS workers and FCs*** • **Scott Pape** -Importance of the role of FC, own experience • **Tracey Grinter** – o How to identify financial & non -financial issues, o What needed with a referral? o Intake & Assessment *Q&A what people think is important information for FCs and where to obtain it & if there should be a in a FC referral form?*	**Scott Pape** Volunteer FC Anglicare **Tracey Grinter** Anglicare	**9.40am** **(30 Min)** **5 mins** **10 mins presentation** **15 minutes questions & discussion**	4 Power points 2 case studies or scenarios per Power Point)
***3. Working Together – How to determine which worker/agency* is the primary client contact – case manager** • **Chris Howard** – Agbiz Assist Rural FC – Case Studies • **Heather Cassidy** – UMFC • **Pou Vaeau** – VACCA When and how to refer to an Indigenous case support • **Renee Hayden** CEO apma healthcare psychological support Gateway Health Team Leader **Jarryd Williams** available for comments and discussion on referring to case support workers	**Chris Howard** – Agbiz Assist Rural FC **Heather Cassidy UMFC** **Pou Vaeau VACCA** Indigenous case support **Renee Hayden** CEO Apma healthcare.	**10.05 am** **50 mins** **5 minutes each** **15 mins questions & discussion**	PowerPoints (case studies)
4. Summary of Key Messages of the Workshop Noting any questions that require follow up	Facilitator	**10.55 am** **5 mins**	1 PowerPoint with contact details
Finish & TOTAL TIME		**11.00 am** **1.35 hours**	

WORKSHOP THREE - HOW TO RECOGNISE AND RESPOND TO SPECIAL NEEDS		
Presenters	**Presenters**	
1. **Introduction** Welcome Acknowledgement of Country Introduction of Facilitators: Bev Kliger and Meredith Carter Purpose: To enhance Bushfire workers understanding of how to work collaboratively in the current environment with multidisciplinary and specialist services such as legal and family violence	**9.30 am** 10 mins **Sandy Ross Financial Counsellors Victoria** CEO Manage chat discussion and Q&A	Panellists invited to log in 10 mins before session start time PowerPoints: Session title Acknowledge country Purpose of session Facilitators via chat or live: Ask people where they are logging in from e.g. place and location Check people can hear and see ok Explain Q&A Function
2. **Recognising Special Needs** • Aim: To help participants understand: • How best to identify and work across a range of concerns including mental health, housing, and legal issues, financial abuse and coercion, other family violence. • The range of services available at key multidisciplinary agencies and specialist services • What issues these agencies are seeing, and • Referral pathways.	**9.40 am** 1 hour: 10 mins ea inc questions) • **Amanda Lamont Towong Shire** Manager, Case support /recovery workers • **Jackie Eckert Gateway** General Manager, Population Health, Planning & Performance confirmed • **Sheri Moulton Upper Murray Family Care** Director Client Services • **Nikita Rinaldo Centre Against Violence** Specialist Family Violence Worker - • **Sarah Rodgers Hume Riverina Community Legal Service-** Manager & Principal Lawyer - • **Cecily Fletcher DHHS** Bushfire Social Recovery Liaison Ovens Murray Area	PowerPoints with key messages, case studies or scenarios Facilitators Manage PowerPoints Spotlight speaker Invite people to post questions for speakers in Q&A box
3. Summary of Key Messages Collaborative Approach – Warm Referrals / Secondary consultations	**10. 40 am** 15 mins Facilitators and Panellists	PowerPoint to include contact details for regional agencies
4. **Session Close** Sandy Ross CEO FCVica	**10.55 am** 5 mins	Note any questions that require follow up
Finish	**11.00 am hours**	

Appendix 3. Template for Evaluation Survey

1. **Overall**, how would you rate the workshop?
2. What information provided in the workshop did you find **useful**?
3. What information was **missing** from the workshop?
4. How could the Workshop have been **improved**?
5. What topics would be useful to learn about in **future** workshops?