DAVID HUBBARD

THE KEY TO A THRIVING NDIS ORGANISATION

Unlock the ingredients which help purpose-driven organisations better serve communities and help more people in need

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Unlock the ingredients which help purpose-driven organisations better serve communities and help more people in need.

To Darleen Taylor, Rani Dibley, Elsie Randall, David Carey, Kimberly Lewis, Alice Lans and Sylvana Mahmic for your dedication, support, and inspiration to better serve communities ...

"We engaged CINCH a couple of years ago because we were facing significant financial challenges in the transition to the NDIS. We needed someone who could help us turn things around financially. We also wanted to maintain our culture of supporting families and keep staff morale high through all the changes. We needed experts in managing finances and operations under the NDIS and we needed someone to help us make the turnaround quickly.

Within a few months we had made significant changes, we had clarity behind the numbers, performance improved, and the Board had increased confidence that things were moving in the right direction and staff were engaged in the process. We are on track with our strategic planning and are positioned to take advantage of opportunities for growth while maintaining a high-quality service to more of our clients.

All the staff at CINCH are wonderful to work with. We have achieved great success in many areas of our organisation due to the expertise, commitment, understanding, experience and professionalism of their financial and HR staff. They just 'get it'!

They have also been able to adapt and modify supports as our needs change which means that we can maintain a really positive, functional and relevant relationship. I don't like to think about where we would be if we hadn't engaged CINCH when we did and I can honestly say that I don't think we would be the thriving organisation we are today, without their support."

Alice Lans

Chief Executive Officer
Noah's Inclusion Services

noahs.org.au

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"Hunter Prelude has been working with CINCH Transform for five years to support us through the transition to the NDIS. CINCH were experts in understanding what we needed to be financially sustainable."

"The support from CINCH has led to successful change management within our organisation while supporting our team."

"We have been able to work in partnership with CINCH to manage our resources and create more opportunities to support children & their families."

"Working with the CINCH team has been an invaluable investment for our organisation and we look forward to growing stronger with their support into the future."

Kimberly Lewis

General Manager
Hunter Prelude

hunterprelude.org.au

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"Our relationship with CINCH has been both important and aligned – the perfect combination for working with any provider. I am truly thankful that ... steered us in your direction and following from that we have such a clear path to follow."

David Clarke

Chief Executive Officer
ParaQuad NSW/NT and BrightSky Australia

paraquad.org.au

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TABLE OF CONTENTS

CHAPTER 1

What Happens When You Don't Understand Your Numbers (and What Happens When You Do)

It all started with an NDIS provider that put itself into voluntary administration.

The organisation had a tumultuous history before they came to CINCH. Over the previous five years, it had changed both its CEO and CFO five times, which meant there was no stability at the top. Naturally, this caused frustration for the organisation's staff, which likely goes some way to explaining why it had an incredibly high turnover rate. And all of these issues culminated in less success than the enterprise expected from its NDIA bulk claims process. With a success rate of below 60%, the group knew it wasn't hitting the target with its claims often enough. And to compound the issue, organisational costs kept rising even as the claims kept failing.

And that's not all.

The organisation had also recently spent a lot of money on a software system, which it believed could make a massive difference for the group. Unfortunately, the staff who knew how to use it were already out of the door, which meant the software wasn't getting maintained, upgraded, or used effectively.

I'm not done yet.

The organisation was in the fortunate position of having a few assets to its name. However, with no process to measure Key Performance Indicators (KPIs) in place, it had no idea about how those assets performed. There was no accurate reporting in terms of budget or operations and the enterprise lost money hand over fist without having any real idea why it was happening.

They didn't know their numbers!

We came into the story when the organisation's voluntary administrators engaged us to run the back office. The group continued to operate while we focused on helping them plug the leaks. We saw some great results during the early stages of the relationship. The low success rate of the organisation's bulk claims rocketed up to 92%, which allowed us to save costs by reducing the number of administrative staff who needed to focus on making claims. We also hone in on the inefficiencies that we spotted inside the organisation.

Rosters of support changed frequently and weren't picked up in the billing. The knock-on effect here was adjustments ending up being processed later or often not processed at all, which messed up the data and claimed even more. As we reconciled the organisation's plans, we found that it had over $200,000 of services it simply hadn't claimed.

I want to tell you this story has a happy ending.

Unfortunately, the organisation went into voluntary liquidation and ended up getting taken over by another NDIS provider just a few weeks into our working relationship. This new provider kept us on board for six months to help them merge the organisation's systems into theirs. And while we made sure the integration went off as planned, we couldn't help but feel sorry for the group as it essentially disappeared into this other organisation and other organisation units, such as social enterprise, were lost forever.

We'd seen the impact that all of this chaos has on the organisation's frontline staff, participants, supported employees, and families. And we came away from that experience with a simple conclusion ...

If you want to be a successful NDIS provider, you need to know your numbers! That means calculating workforce capacity, setting appropriate budgets for each division of the organisation, and monitoring your KPIs. If you don't know your numbers, you're not helping as many people as you set out to do in the first place and you're at risk of losing it all, as this story proves.

And to highlight this point further, I want to show you what happens to the organisations that do master their numbers.

What Happens When You Get This Right?

While the above highlights the story of an enterprise that didn't get the numbers right, I also have plenty of examples of clients who have used the CINCH Transformation Program to create positive change in their organisations.

During the transition to the NDIS, we worked with many providers who moved from block funding to the NDIS framework which, if you don't already know, is based on individualised funding packages based on the participant's needs and goals. As an example of the impact of this change, one organisation found that making this change meant they would lose funding, which created a challenge if operations were to remain the same.

They would not turn over as much money under the NDIS.

The organisation came to CINCH because it believed getting a better understanding of its numbers would help it to reduce costs and lessen the impact of the change. This understanding extended to calculating unit costs, identifying KPIs, calculating workforce capacity, and running through an array of possible financial models. As you might guess, this is all work related to the financial aspects of running an organisation. As such, we also needed to find a way to communicate this information to key stakeholders who weren't necessarily well-versed in finances nor the complexities the NDIS brings to governance.

We came up with a two-part plan:

1. Spend as much time as needed to understand the organisation's numbers and build a sustainable financial model.

2. Work with the organisation's people to help them achieve a change in culture, which would allow us to achieve the outcomes the client wanted.

That last one was especially important, as many in the organisation felt worried about the transition to the NDIS.

For three years, we worked with the organisation to improve its service delivery practices and develop a "can do" culture. During that time, the NDIA made several changes to the framework, such as pricing, which presented even more challenges.

However, the hard work paid off.

Now six years into the relationship, this enterprise is in a place where it can look for more opportunities to deliver services in its community. Its workforce operates at a higher skill level than ever before, as well as having a deeper understanding of what's required from them. And perhaps most importantly, the organisation now has a financially sustainable framework, which allows it to operate effectively within the NDIS framework and take advantage of other funding and service delivery opportunities.

All of this came from the early focus on understanding the numbers.

And this isn't the only group that's experienced success thanks to developing a better understanding of the numbers.

We worked with an organisation that needed to make a similar transition from block funding to the NDIS. In this case, the group had the added challenge of maintaining support in one-to-one high needs community participation where the NDIS average rate per hour was less than they received under block funding. Much like in the previous story, the organisation could see it wouldn't make as much money under the NDIS. For example, its approximate hourly rate would drop from $60 to $38, which threatened to put a massive strain on resources.

Recognising these emerging challenges, the group's leaders came to CINCH for direction.

Much like with the previous client, we sat down with the group's key stakeholders and ran through the most important numbers. We came up with a range of financial models and discussed how the transition would impact various areas of the organisation. We developed a plan, put it in a language that the board could understand, and presented it.

At the time, the organisation's leaders predicted it could only operate for another 18 months before getting forced to wind up!

With our help, the organisation made several internal changes, which allowed it to first break even and then develop a small financial surplus. This extra money gave the group more time to adapt to the NDIS processes and set up a structure, which allowed for further cost savings. To help with this, we conducted an organisational review, developed a structure and road map to enable the transformation the group required to operate successfully under the NDIS.

Today, it's safe to say this organisation didn't have to wind up. Now, its key stakeholders understand the numbers which underpin their organisation, and they have a sustainable financial model in place. The culture in the group focuses on what they can do, rather than what they can't do, and the organisation has been able to take advantage of several growth opportunities, which include winning tenders for more NDIS services and acquisition of several other NDIS service providers who weren't managing successfully under the NDIS.

Most importantly, it's growing tremendously!

With the help of CINCH, the organisation achieved a staggering 700% growth in four years. That's a remarkable turnaround given the fact the group was 18 months away from closing when we first started working with them. And while there's still work to do in terms of developing internal systems to sustain this growth, the organisation is well on its way to becoming a major NDIS-funded provider.

Again, this success came because the company did one important thing:

It understood its numbers!

Do You Understand Your Numbers?

Now, I want to turn the spotlight onto you.

If you're reading this book, you have an organisation that's providing services as part of the National Disability Insurance Scheme (NDIS) and you're in the business of helping people. If that's the case, you've likely encountered many of the same challenges the clients I've discussed have faced (and more). The question now is, how are you going to manage those challenges?

You could take the same approach as our first client. Meaning, waiting so long you're on the cusp of going into administration before you consult somebody to help you. It means continuing to operate in a state where you don't know enough about your numbers and what they mean for the future success and impact on the people you're here to help.

Or you could take the approach our other clients took. You could make understanding your numbers a priority in your organisation because it's this understanding of the numbers which determine the decisions you make to provide a sustainable and quality-driven service.

I'm guessing you want to have an organisation that understands its numbers.

In this book, I will introduce you to the 10-phase structure CINCH Finance & Operations uses to help our clients understand their numbers. I'll show you what you need to know about your organisation that will allow you to create a sustainable structure enabling you to deliver your services to more people and have the impact you want to have on your community.

But before we get to that, I know you have one burning question on your mind...

CHAPTER 2

Why CINCH?

I've established why knowing your numbers is so important. Now, you need to know why you should listen to me in the first place. My name is David Hubbard and I'm the Founding Director of CINCH Transform. I've established a program we have used to transform (as of 30 June 2021) 71 NDIS providers, which is why knowing your numbers is so important.

We specialise in organisational transformation, helping NDIS providers and Aged Care and Community Housing organisations across Australia improve performance. Working with organisations of all sizes, we're able to help these groups develop a better understanding of the numbers which underpin their work. They make more informed, proactive decisions and, most importantly, we help them develop strong, sustainable organisational structures to provide quality services to more people without having to worry about the survival of the organisation.

That's the dry side of things.

On a personal level, I founded CINCH because I have always enjoyed working with the not-for-profit sector. There's a certain sense of fulfilment in this work I simply can't find in the commercial environment. When working with commercial enterprises, the goal always seems to lie in lowering taxes and making money. But in the work I do now, I'm able to pursue my true passion – working with organisations to strengthen them to better serve communities, which improves people's lives, helping more people in need.

That brings me to the intent which underpins everything I do at CINCH.

I've found many in the not-for-profit sector don't quite understand their numbers, which means they struggle to run efficient organisations (I mean this in the nicest possible way. This doesn't indicate how hard people work and their intent behind working for a not-for-profit). It makes sense when you consider many of these people don't necessarily come from business backgrounds. Instead, they have founded or worked

in these companies because they have a deep desire to help others in need and their communities with a more inclusive approach to living.

Perhaps it's this desire to help you help others that is my main driving force.

I founded CINCH in a climate where many organisations were block funded and in the process of transitioning to the NDIS. With my help, these organisations can now develop a better understanding of how to run an organisation, as well as how to develop a culture that aligns the outcomes of the organisation.

We focus on helping organisations like yours deliver quality services to your customers. We help you to improve efficiency in what you do while showing you the ins and outs of what makes the organisation tick. Ultimately, we want to help you find more money and more resources in your organisation, which means you can make a deeper impact on your communities through the programs you offer.

To do that, CINCH operates based on a set of core values that are crucial to everything we do.

Our Values

At CINCH, we have a number of core values, three of which represent the type of person we wish to have working in our organisation. Crucially, we also aim to work with organisations aligned with these values. They are at the forefront of everything we do, and we discuss them regularly within the organisation.

They are as follows:

1. **Care** – We take pride in all of the work we do, and we believe in taking ownership of all of it. Our goal is to demonstrate to our clients we're dependable, honest, accurate, and we deliver on the outcomes we promise.

2. **Innovation** – We commit to demonstrating our value in all aspects of the work we perform with our clients. Our goal here is to ensure our philosophy of continual improvement extends to all aspects of our operations. Simply put, all of the work we do must add value, be it for our clients or for the communities they serve.

3. **Making A Difference** – Our commitment to delivering to the highest possible standards means we must run an adaptive organisation. We offer flexibility in all aspects of our work, from agreeing on what needs to be done and when through to how we deliver our services. This value allows us to think on our feet and adapt to changing situations, which is especially important in regard to the ever-evolving NDIS.

These values inform the partnerships we form with our clients and our goal to support your organisation's transformation.

The Importance of Purpose

We believe transformation happens more fluidly when everybody inside an organisation aligns with a specific purpose. There is a reason why your organisation exists, and ensuring your people understand the purpose behind your organisation is key to engaging them and developing a strong culture.

Purpose creates clarity, which leads to strong outcomes and the ability to help more people through the work they deliver. Understanding your purpose is also key to the work we do at CINCH. When we have a deep understanding of the outcomes you wish to achieve, we can create operational solutions and organisational models which are aligned with these outcomes.

Boosting Your Performance

Performance relates to many aspects of your organisation, from the quality of services you provide to how the organisation operates. These aspects include the following:

- The outcomes you create for the people you work with.

- Psychological safety and the role of your leaders in the organisation and the impact of culture.

- The ability to deliver quality services in all circumstances.

- The ability to help more people with your services, which means you have a greater impact on the people you are there to support.

- Reinvestment into the future of the organisation through the people, training resources and infrastructure (equipment, systems, property).

- Growth opportunities within the organisation.

- Cash flow improvement.

- Improved systems efficiency.

- The ability to develop more programs, which extends your reach within the community.

We focus our work on helping organisations achieve performance boosts in all areas relevant to them.

The Power of Profit

"Profit" is often seen as a dirty word in the not-for-profit sectors. You didn't create your organisation to make a lot of money, which is why you're more focused on delivering your service to the people who need it.

We understand this viewpoint and we don't disagree in terms of profit not being your main priority. However, it's also not something you can ignore. After all, it's your ability to make a profit that has a direct impact on your ability to provide your services. Time and again, we've found our most successful clients make a profit, which they then reinvest into the important work they do.

Our goal is to put the various systems in place which enable this profit, allowing you to focus more on what you do for your communities. And this brings me to the vision and mission which defines CINCH and what we do.

Our Vision and Mission

I believe CINCH is at the very beginning of its journey and our vision and mission reflect this. In terms of our vision, we initially aimed to help organisations reach an additional 10,000 people in the community in eight to ten years. However, we've since revised this vision and now believe we can help organisations reach 20,000 in less than five years.

Why should you care about that?

Yes, our vision has increased revenue targets to achieve this internally. However, this should not lead you to think we focus solely on profit. Think back to our values – our revenue growth means we're providing services to more organisations which improves the sector, and they support more people in need – improving efficiency means funds are spent more on service delivery.

Ultimately, our focus is really a focus on our ability to work with organisations transforming into high-performance organisations that deliver quality outcomes for people in need.

And that brings me to our mission. How will we make my vision for CINCH a reality?

Right now, we're focused on extending the scope of our services so we can use the knowledge we have on the NDIS and pass it on to as many clients as possible. Beyond improving the performance of organisations operating under the NDIS, we're also working closely with organisations dedicated to community housing and aged care where our mission is to help such organisations improve performance to deliver their services to more people in need.

We help you to drill down into organisational productivity and understand your key drivers. We're dedicated to building on our expertise in the sectors we work in, so we consistently deliver on the three core values I outlined above.

Simply put, our mission is to do for you what we did for the successful organisations I highlighted in Chapter One:

Build a strong and sustainable organisation (Systems, People and Outcomes) which has a greater impact on people in need.

Our Passion Lies in Helping You Do Great Work

Perhaps some of what I've just shared seems a little business-like to you. But I don't believe that is a bad thing for the CEO, Ops Manager or Senior Leadership Team of a not-for-profit to see. In many cases, the struggles such organisations (usually smaller ones) often experience trace back to a lack of business acumen and/or support from the board of directors.

Ultimately, that's the hurdle we want to help you overcome.

I've explained all of this to you because it's an example of what successful organisations have in their organisations. This doesn't mean you've suddenly got to shift focus solely towards making a profit. You do need to understand your purpose and how you can improve performance. You must also make money, create cash surpluses, so you can achieve outcomes you've set for your organisation (while riding the highs and lows in the market).

CINCH helps you do this.

And in the following chapters, I'm going to dig into exactly how we do that. I'm going to introduce you to the program we use to help organisations like yours improve their outcomes. Starting with an understanding of the 10 Phases of the CINCH Transformation Program.

CHAPTER 3

Introducing Our CINCH Transformation Program

How have we helped so many not-for-profits achieve their desired outcomes?

Simple: we leverage the CINCH Transformation Program. We've created a diagram to demonstrate what this looks like:

While we list these phases in sequence, your organisation doesn't need to follow the program in the order above. Many of our clients start in the area which requires the most attention.

For example, we have clients who may start at Phase 2 or 3 before jumping up to Phase 7 or 8. The key to the program is you use it to develop systems and processes, allowing your organisation to achieve its outcomes.

In the chapters to come, I will cover what each of these phases means for your organisation. Before this, let's examine an overview of each phase.

Phase 1 – Organisation Review

Typically, this involves taking a high-level overview of an organisation to assess its health. Our goal in this phase is to improve our knowledge of how the organisation functions through an understanding of its financial circumstances, risks, organisational structure, systems inefficiencies, culture, leadership, and people (Psychological Safety Audit). We begin to understand the main pain points and the areas of the organisation which are priorities for improvement.

We also drill down into the key performance drivers. For example, a client may identify an issue with unit costs, which leads us to closely examine this area and look for opportunities to create improvements.

Ultimately, this stage provides us with a snapshot of the organisation which covers what it looks like and areas needing improvement.

Phase 2 – Clarity

This is where the action happens for many organisations as it's in this phase that we drill down into the Key Performance Indicators (KPIs). These KPIs include both financial and non-financial drivers, with the following being typical of what we examine:

- The number of NDIS plans
- Plan completion rate
- Average plan value
- Staff retention
- Staff utilisation
- New enquiry conversion

However, this phase can also present some key challenges. We can only examine the data if the client has processes in place to measure the KPIs mentioned. If not, implementing those processes becomes a key focus for the organisation.

Assuming we have access to the required data, we use these KPIs to assess various areas of the organisation and highlight aspects we can tweak to improve performance. We also compare our findings against our knowledge of the NDIS and relevant benchmark reports to develop a greater understanding of the financial challenges the organisation faces.

This phase helps us to determine the organisation's break-even point, the cost of individual organisation units, and areas where the enterprise will need to make a surplus.

Phase 3 – Scenario Modelling & Analysis

In this phase, we leverage the information discovered in Phase 2 to develop a range of financial models and potential outcomes for the organisation. This allows us to examine the structures required to achieve the desired outcomes, which leads to discussions about strategic objectives and planning.

Running different scenarios allows us to understand the financial impact each model will have on the organisation. In many cases, this helps us identify unforeseen issues at an early stage, thus ensuring senior leaders don't rush into implementing a model which could cause long-term issues with its ability to deliver outcomes to people in need.

We also leverage the KPIs discussed in Phase 2 by setting benchmarks for what the organisation hopes to achieve. We discuss what the client aims to achieve in terms of project completion rates, average plan value, and more. We make recommendations based on our modelling and actions on how the client can achieve those numbers and a suggested timeframe.

Phase 4 – Next Steps & Recommendations

Assuming the organisation follows the phases of the CINCH Transformation Program in sequence, it now has a lot of information to digest. The Senior Leadership Team often needs time to understand what it's learned, filter through the information, and figure out how to communicate the information to the CEO, board, and other key stakeholders.

Consider this phase as an opportunity to take a step back and decide what needs to happen next. The client has the opportunity to assess the resources they currently have access to and plan out the internal changes required to follow the recommendations made in Phase 3. It's in this phase the client will begin the examination of specific projects and how they'll manage them, in addition to setting priorities, timeframes and determining who's responsible for change implementation in the different areas of the organisation.

Furthermore, this phase offers the opportunity to see how focusing on the required changes will affect business-as-usual activities. Our client may find they require ongoing support from the CFO or financial management team to "fill in the gaps" while other members of the team dedicate themselves to implementing the recommended changes.

Finally, this phase also allows the organisation to determine which, if any, of its required projects it can outsource to other departments or external providers. Again, this creates the time and space needed to focus on new systems implementation.

Ultimately, Phase 4 outlines the next steps the organisation needs to take to achieve the outcomes it wants. In some cases, the client may choose to take these steps themselves before re-engaging us for later phases of the program. In others, the client may wish to work closely with us to aid in the implementation of the recommendations or strategic plan.

Phase 5 – Low-Hanging Fruit

This phase involves a deep dive into the organisation where we identify specific costs and capacity issues which could impede the implementation of the new strategic plan. Typically, this involves examining every area of the organisation, from operations to back office, to determine where it can improve efficiency and make cost savings.

We essentially pull the organisation apart to determine the resources it has and how it can most effectively use those resources to meet the demand. This often involves the following steps:

- Tracking the workflow of existing systems so we understand how they work now and what could change in the future.

- Determining which processes the not-for-profit can automate to save time and money.

- Segregating duties and improving internal controls to lower the risk of misstated funds.

- Reviewing balance sheet items to assess the organisation's liquidity and capacity. We look for any items on the balance sheet the client isn't utilising properly, which may include property, loans and debt facilities which may need reviewing.

- Examination of existing supplier contracts to determine whether they're cost-effective. We may also begin to look at new suppliers here, especially if we identify a supplier which offers extensive cost savings.

- Looking at Profit and Losses (P&L) documents, which allows us to enquire about various expenses and the outcomes they bring to the organisation.

Additionally, this phase may involve recommendations related to training, especially in cases where the organisation has an issue with team members leaving without passing technological knowledge on to colleagues.

Phase 6 – Workforce Capacity, Efficiency & Mindset

This is where we drill down into staff time and activity. The aim here is to understand which activities staff members spend their time on and whether those activities are relevant both to the person's role and the organisation's desired outcomes.

We examine the various processes staff follow to deliver the organisation's services and how we may improve efficiency in these processes. We also discuss staff capacity in line with the projected revenue and KPIs determined during the modelling stage of the program. Often, this involves looking back at the models created in Phase 3 and implementing small tweaks to account for various staff issues which may have a financial impact.

In addition to these direct productivity issues, we also use this phase to develop an understanding of the workforce's overall mindset, with a particular focus on its ability to manage change. Implementation of new models may result in changes to pay periods, work systems, and the way the organisation delivers its services. We need to know the current staff understands the need for change and will get behind it.

Finally, this phase also involves identifying the potential for leadership coaching and other team improvement measures relevant to Phase 7 of the program.

Phase 7 – Operations & Infrastructure

Here, we look at the not-for-profit's systems, team, and underlying structure. The ultimate goal of this process is to determine what the structure needs to look like for the organisation to achieve the best possible outcome from both cost and efficiency point of view.

During Phase 7, we identify the key people in the organisation we need to get on board and support the recommended changes. We also offer coaching to the Senior Leadership Team to help with the various challenges implementing change can bring to an organisation.

We also work with the client to examine performance, staff roles, and classification of staff. Often, we discover existing staff issues arise due to the organisation struggling to communicate expectations properly, which is another issue this phase remedies.

The specific focus on structure here allows us to determine if the organisation has what it needs to implement change today and, if not, what it needs in the future to enable the transition to its new organisational structure.

Phase 8 – Strategy, Opportunity, and Growth

Now, we reach the phase CEOs love most – achieving the dream of growth.

In this phase, we start helping the organisation make plans for growing revenue. Typically, most of our clients go through most of Phases 1 to 7 before focusing on this area, as it's these phases which lay the foundation for the growth to come. Revenue growth focuses on facilitating the provision of the organisation's services to more people and deepening the enterprise's impact.

Often, this involves work related to mergers and acquisitions. While time-consuming, this can help the organisation to expand its breadth of services, which allows the community it serves to benefit substantially from the additional resources provided. In many cases, this includes offering more services to the community through a merger or acquisition, though this is not always the case.

Phase 8 also allows the organisation to review its current programs and identify opportunities for filling gaps in the market other providers aren't focused on. We find organisations relish the opportunity to be creative and develop more innovative programs enabled by the work done in the previous phases.

Phase 9 – Making Great Decisions

Implementation means little if there are no processes in place for analysing, monitoring, and reporting on the effectiveness of new processes. If you're not keeping track of the changes you make, you may miss key issues which derail your efforts to provide better services to communities.

This phase involves the creation of regular reporting processes enabling communication between the board, senior management and those who work on the ground delivering services. These reports enable rapid

decision-making in addition to highlighting issues needing attention going forward. They also support the ongoing analysis of the information the organisation gathers about its new systems.

We also help clients create a single-page dashboard providing an at-a-glance overview of key financial and non-financial information.

Ultimately, this phase provides the not-for-profit with the ability to act quickly when issues arise and see opportunities in the market when they become available.

Phase 10 – Continuous Improvement

Upon completion of the other nine phases, the organisation has new processes in place and has improved efficiency across the board.

What comes next?

Phase 10 focuses on continuous improvement of key areas of the organisation. Key here is the realisation that successful change doesn't occur overnight. It's a continuous process requiring dedication from all involved, from staff on the ground through to the key stakeholders who lead the organisation.

During this phase, we answer some key questions about what the organisation needs to continue on the road towards improvement. These questions include the following:

- Can we make infrastructural updates which improve capacity and/or the provision of services?

- Do staff require further professional development to help them adapt to the changes implemented?

- Is the customer experience the best it can be and, if not, what can the organisation do to improve it?

- Does the not-for-profit deliver quality services which have the desired impact and outcome?

- Are there more people in our community who we could support with our services?

Losing sight of the need for continuous improvement can lead to an organisation slipping back into its "old ways". With this phase, the not-for-profit ensures growth and creates opportunities both for its staff and the people it serves.

Methodologies Make Organisations Work

As mentioned at the beginning of this chapter, many of our clients move through these phases in the order most comfortable for them. For example, some of our clients prefer to focus on improving productivity and making savings in their current model before they start developing and testing new ideas.

Conversely, others prefer to follow the program as it's laid out to ensure they cover every base on their way to transformation.

Both approaches have merit. The key lies in a commitment to implementing change while understanding there are often several areas of your organisation that require improvement or, at the very least, tweaks.

Through the CINCH Transformation Program, you cover every aspect of your organisation's transformation. The overview in this chapter highlights the key areas of focus for each phase. In the following chapters, we will dive deeper into these phases individually so you understand exactly what working through each requires.

ABOUT DAVID HUBBARD

Authentic, considerate, and diligent were three words used to describe David Hubbard when asked by a number of clients, close friends, and family. Graduated as a Chartered Accountant, David built his career supporting organisations in achieving their strategic goals, creating solid financial models, and improving efficiency. However, David wanted to have more impact in the community. He wanted to strengthen businesses who serve the vulnerable and improve people's lives.

That's why he founded CINCH Transform.

Since 2014, David and his team have worked closely with many purpose-driven organisations, helping them develop sustainable business models, adapt to funding changes, and fulfill the organisation's purpose by helping more vulnerable people.

ABOUT THE BOOK

The introduction of the NDIS was a major disruption to the way organisations were funded in Australia. Suddenly, thousands of purpose-driven organisations found themselves struggling to adapt. This meant they weren't focused on their core purpose of supporting Australia's most vulnerable in the way they wanted to be supported. They certainly couldn't do it while creating a business model which was sustainable and a culture which would allow an even more significant impact on the lives of many in the future.

Until now!

In this book, you will learn from real-life experiences and the 10-Phase CINCH Transformation Program that David Hubbard developed to help organisations sustain financially, operationally, and culturally, allowing customers to receive the care and quality services they desire. You'll discover which key numbers are the most important in managing an organisation and how changing your mindset can significantly increase the capacity of your people. Most importantly, you will discover from firsthand case studies those who have experienced the CINCH Transformation Program and how it has improved their success under the NDIS framework.

THE KEY TO A
THRIVING NDIS
ORGANISATION