Listen, learn, lead

2018 Human and Social Services Outlook

KPMG International

About this document

This report is based on an international survey of CEOs in the human and social services (HSS) sector which highlights the challenges, priorities and opportunities within the industry. The report highlights common areas of concern and provides some high-level next steps based on real-life case studies and the collective expertise of KPMG's international network of HSS practitioners. The report also compares the views of over 100 senior HSS executives from six countries and compares their views with counterparts in the global private sector.

Survey background

Globally, there are a range of pressures facing government and service providers within the human and social services sector. For example:

— imbalances in funding, with a heavy focus on acute interventions and crisis responses over investments in early intervention and prevention

— technological change from analog to digital and constraints around sharing data

— shifts in the community's expectations of government

— moving from program-specific silos to client-centric approaches.

These pressures are forcing governments and service providers to re-evaluate aspects of the structure, function, operation, and regulation of the human and social services sector. The survey aimed to:

— understand the actions taken, and the challenges faced by government agencies and service providers in response to these pressures

— assist in necessary preparation for environments where rapid change is now the norm, with increased pressure to provide focus on value and outcomes

— enable the HSS sector to better understand strategic challenges and discover similarities between countries to assist in creating solutions.

This report is written for Chief Executive Officers, Government Secretaries, Deputy Ministers and Senior Executives of service providers in the HSS sector.

Note on language

Human services work with vulnerable or disadvantaged members of society. The way these ecosystems work globally vary, as does the language used to describe them. We have used some terms that are not universally applicable thus, providing explanations below:

— **Customer:** this refers to the people receiving services. They may be referred to as citizens, service users, clients or recipients but they are the vulnerable or disadvantaged members of society that require support.

— **CEO:** this survey was completed by senior officers from government organizations, private providers and not-for-profit organizations. The leaders of these organizations are not universally referred to as Chief Executive Officers, but CEO is used for ease of reference.

Foreword

Welcome to the first KPMG Human and Social Services Outlook, a report based on the views of HSS leaders that highlights the challenges, priorities and opportunities of the sector. It compares the views of over 100 senior executives in human and social services and paints a rich picture of the sector and where it is headed.

Around the world, human and social service systems are facing similar challenges and are developing similar responses to meet them. Doing more with less is a common theme and many organizations are focusing their available resources on addressing the real needs of customers, though their success and maturity varies between countries.

HSS leaders are building a new system that addresses customer needs and develops affinity with them. This requires new ways of thinking and working, but is critical to providing effective care and support with constrained resources. Given the pressures on the system, doing nothing is simply not an option.

This system will include unlocking the power of data as a tool to understand the customer, building services around their needs — including early intervention and integrated approaches — and stimulating innovation to enable organizations to adapt and thrive.

Developing such a system cannot be done overnight and for many organizations will require a significant transformation. Our survey shows that the sector understands where it needs to go and how it needs to transform but it has also highlighted some challenges.

Much of the sector is not built for change and it has lagged behind the global economy in key areas. In some cases, this is understandable, given the need to support vulnerable and disadvantaged people and communities. However, for the same reason, the sector is striving to do better to ensure that it can continue this critical mission. Tight budgets are common problems but our survey shows that other factors, like culture, incentives and training are also preventing the sector from adapting in the way it needs to.

As the sector faces similar challenges and has identified a direction of travel we are launching a network to help facilitate conversations between leaders, and to enable HSS leaders to benefit from the experience of peers in the sector and beyond (read more under 'Take Action' on p. 11).

I would like to thank the CEOs who we spoke to and who have provided a rich and detailed image of their organization and the human services ecosystem in which it operates. We are excited to talk further about these insights, and KPMG member firms welcome the opportunity to discuss how you can build customer affinity in your organization.

Liz Forsyth
Global Human and Social Services Lead
KPMG International
Hover for bio

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Executive summary

Human services serve the most vulnerable and disadvantaged members of society but are caught between budget constraints and the volume and complexity of support that customers increasingly require. Funding is not keeping pace as levels of need and expectations increase which results in crisis for organizations struggling to support their customers.

To respond, organizations within the ecosystem are working to better understand the people they serve. They are transforming to develop customer affinity and to then adapt their structures and processes to respond to what they learn.

Customer affinity means developing and demonstrating a strong understanding of the customer, from what they need now and will need in the future, to how services can meet and exceed their expectations. Developing affinity requires an organization to capture, understand and act upon a wide range of information and may require fundamental or structural change to enable it to do so.

While there are various forms that transformation may take, **CEOs have identified their top five strategic priorities for the next 3 years:**

1. Building a stronger customer focus (or better meeting customer needs)

44 percent of CEOs say developing affinity with the customer is the number one strategic priority. By enhancing affinity, organizations can improve the design and delivery of services that reach people in the right place at the right time.

2. Fostering innovation

The human services sector is behind the global economy with regard to the maturity and effectiveness of innovation processes and culture. Only 13 percent indicate they are effective innovators as they lack a strategic approach that ensures ideas are appropriately reviewed, tested, deployed, and learned from.

3. Developing and managing talent

Staff are often caught between the pressures of tighter budgets and increased demand. The constant need to do more with less can result in stress, lack of motivation and ultimately the loss of key people. This weakens service quality so supporting employees is critical. HSS CEOs rated this as their third strategic priority to address.

4. Becoming more data-driven

Data is a key element of developing customer affinity but 50 percent of CEOs say they are not using data effectively. Human services organizations, however, have unparalleled access to a vast amount of rich information about the people they serve. In a world that is driven by data, there is significant untapped potential.

5. Digitizing the business (or technology transformation)

Many governments are undertaking large-scale digital transformation projects. This is a response to many processes in the sector being unwieldy, disconnected and paper-based which weakens quality of information that organizations gather. 24 percent of leaders rated digitization as their highest priority as old processes limit agility and flexibility.

Take action

Leaders within the global human and social services sector face common challenges. Many organizations have the same areas of focus in the next few years.

The survey also shows that HSS leaders and organizations can benefit from looking outside the sector and at best practices within, especially in areas such as innovation and data and analytics.

We have established a network to facilitate those conversations, and to enable HSS leaders to benefit from the experience of peers in the sector and beyond.

> ❝ Understanding your clients is a critical component to improving outcomes… having clients' voices heard is fundamental to better service and improved outcomes. ❞

Allison Bond
Deputy Minister
Ministry of Children and
Family Development
British Columbia

The case for customer affinity

The sector knows that it has to better meet the needs of its customers: it is the overwhelming strategic priority of human services CEOs in the next 3 years. This demonstrates the critical importance of understanding what customers need now, but also how those needs will change over time.

A thorough understanding of those needs is fundamental for any successful organization, but for human services it will significantly improve the quality of life for vulnerable or disadvantaged people and their communities. The human services sector reflects other sectors in that meeting customer needs and fostering innovation are the top strategic priorities for the next 3 years. Human services CEOs, however, ranked customer needs as the clear priority, rather than a narrow second place.

The impact of getting it right does not end with the end-user of a service. Families, friends and other informal carers are also directly affected by the levels of support they need and receive. These people often have a far greater understanding of the end-user, and have a closer personal relationship with them. They are often responsible for ensuring that care and support is received and so are often under significant pressure to balance personal, professional and financial commitments.

Strong customer affinity means an understanding of an individual's informal support network

Friends

Community groups

Family

Informal care/support

> **The system needs to ensure we understand what makes a good day for individuals.**
>
> **Stuart Cowley**
> Wigan Council
> UK

Where government can empower, enable and support informal carers and community groups, it can use their strong relationship to improve the quality of care and support provided. This cannot be a shift of responsibility onto carers and should not be a justification for reducing services. Helping informal carers will require investment beyond traditional financial support and training; mobile apps can easily connect a vulnerable person to their carer and their carer to other carers, support groups, services and other sources of help. Understanding the needs of the informal sector workforce could be one of the keys to better support.

Developing a similar understanding and affinity with the customer enables services to be designed to provide the right support at the right time. This can be used to design early intervention approaches to prevent the needs of an individual increasing, targeted interventions to work more intensively with those who need it most and to improve the quality of services by increasing the time spent on support provision.

Definition of customer affinity

How well an organization understands the needs and preferences of its customers. An organization can demonstrate customer affinity through:

— Ensuring that services can be easily accessed, when a customer reaches out there should be no wrong door

— Listening and recording information to ensure that a customer does not need to repeat their story. This should be between services and, where possible, across organizations and the ecosystem

— Intervening early in the development of need by understanding that pathway and early indicators

— Providing the right services at the right time and continuing to refine their design around where and when customers need support

— Ensuring staff have the time to listen and respond to the customer

— Key enablers of customer affinity are: attracting, retaining and motivating the right staff; supporting them with HR processes; collecting and analyzing data; and providing connected, agile technology that enhances, rather than damages, customer interactions.

Focusing services on the needs of the customer also enables an organization to maximize the value of the funding it receives. Large-scale blanket services can be refined towards the people who need that support, enabling more staff time to be used for people needing more intensive care and support. Shifting services towards targeted, early intervention, when done effectively, reduces reliance on expensive intensive or acute services because staff time and budget gets allocated across the spectrum of needs. Developing greater customer affinity therefore benefits the customer, staff and the bottom line.

Front-line staff are clearly in the best position to develop and demonstrate customer affinity. They have the most contact with customers and often discuss the most intimate details of their lives. The personal and professional skills of staff are key to developing affinity but an organization must ensure that staff have sufficient time to talk. If staff are excessively restricted by time or overly prescriptive checklist approaches they will lose their connection and customers may disengage from services.

To be successful, affinity with the customer must go far deeper than empathetic front-line staff. It should be a core element of all levels of the organization. Assessing how well each part of an organization contributes to the customer provides valuable insight into how effectively it is designed and operated.

This means looking at interaction between organization and customer to see whether it is responsive and empathetic.

Technology and information management can be calibrated to capture, manage and use the information that can be gathered. Data should be matched with lived experience and should be easily accessible to frontline staff to enable them to quickly understand what has gone on in the life of the customer.

What is the top challenge facing your organization?

"
Poor understanding in the general public, and with many decision-makers, of the complexity and drivers of client need — and the areas most likely to have positive impact on client outcomes.
"

Dale MacLennan
Executive Director
Government of Nova Scotia

> " Understanding the people you serve means you can support the areas where they need it and enable their independence for everything else. "

Jason Parker
Head of Health and Human Services
KPMG in the UK
Hover for bio

Marketing and service design can ensure that the external face of the organization fits with what the customer wants. This is best achieved by listening and engaging with the voice of the customer in a co-creation process.

Critically, a leading organization see itself through the eyes of the customer as part of the ecosystem. Many organizations are moving towards a 'tell us once' approach by which information from the customer is gathered and passed to all relevant services. This ensures that people trying to access services do not need to duplicate forms or explain their issue on multiple phone calls which is frustrating and does not demonstrate an organization built around the people that it serves.

Customer affinity is a simple concept but developing it is a complex and multi-faceted process which may take time and investment. It requires a long-term and system-wide perspective on improving services, processes and

tools that are not already well adapted to building affinity. Organizational structures and funding models that result in a narrow and transactional view should be addressed as it prevents integrated and personalized care, and is likely to result in the customer requiring other services when their needs are more acute.

Building customer affinity is therefore a challenge to the sector and developing it will look different for every organization. However, it is a clear priority for the sector that can bring significant benefits to performance and outcomes.

The sector has recognized that customer experience has the potential to be a major disruptor to the ecosystem and could lead to fundamental changes in the way that services are provided now and in the future.

How to transform

As external pressures mount, system weaknesses or failings become more apparent. Waste and inefficiency that was accepted in times of plenty becomes unacceptable and reports of changes to services often mischaracterize luxuries and excess.

51 percent of human services organizations ranked achieving transformation or large-scale change as among their top five challenges in the next 3 years. The sector therefore knows that it needs to change and that doing nothing is not an option.

Many organizations are reaching a point at which small changes are no longer sufficient. For them services have been cut back, corporate services have been reduced to a minimum and all cost-improvement options have been exhausted.

Transforming the organization is tough under these circumstances. The potential cost, time and disruption make it a difficult decision to embrace, but one that is necessary to ensure that the organizations is sustainable for the future.

Other organizations that are not yet at that critical stage should still be prepared to respond early, as they will struggle with the added costs of planning and resourcing the effective transformation that it needs.

The direction that transformation needs to take is clear: moving and structuring human services to build and apply customer affinity. How to implement that transformation in practice is far more complex.

The CEO survey demonstrated an interesting distinction between the theory and the practical application of change.

Seven elements for organizational transformation

Adaptive Leadership
Be well-led

Purpose
Driven focused on your priorities

Resilience
Lean, efficient and sustainable

Reimagined (organization)

Customer affinity
Understand your customer — needs and expectations

Empowered people
The right people and culture

Agility and flexibility to evolve
Be able to adapt and constantly evolve

An analytical ecosystem
Informed by data, the market and innovations

Customer affinity is one of the seven elements for transformation in human and social services and is a critical element to incorporate in all parts of an organization.

" Transformation requires change to structures and the ecosystem around an organization but, most of all, success is dependent upon the people and culture of the organization. "

Claire Sime
Director, Human and Social Services
KPMG in Australia
Hover for bio

The majority of organizations saw leadership focus (72 percent) and clarity of vision (66 percent) as organizational strengths, with regard to change management capabilities. This confidence is partly expected, given the nature of participants, but it shows that those at the top believe that they know where the organization is going.

What they can't do is implement that vision.

— 63 percent saw weakness in their alignment of metrics and incentives that reward people for working differently.

— 60 percent of CEOs identified the availability of sufficient resources to help with transformation initiatives as an organizational weakness.

— 50 percent cited capacity as a weakness, in part due to the number of different changes going on at once.

— 46 percent saw knowledge transfer, training capabilities and resources as a weakness.

In short, there are not enough people and they don't have the time, knowledge or incentives to work differently and implement transformational change. This is a weakness of the culture of the organization and shows a disconnect between leadership vision and their ability to transform.

Enabling an effective culture for transformation will not create resources from nothing but it will make the most of the people that you have. Aligning incentives and supporting skills and knowledge transfer, all will contribute to an organization's ability to transform successfully.

Cultural change

38 percent of HSS CEOs saw achieving the cultural change required to enable reform as a key challenge. This reflects the value of a well-planned and effectively delivered transformation plan that considers the human factors as well as the more tangible changes. Implementing new software, merging organizations or changing processes and structures all require cultural change to be effectively implemented. Without it, their costs merely add to the wastage.

The culture of an organization is a complex and multi-faceted concept, but the building blocks are simple — the people and their relationships within an organization. Culture exists in their assumptions, beliefs, values, norms and behaviors. Attempting change without their buy-in, involvement, engagement and support is likely to result in failure and could potentially build barriers between leadership and operational staff.

Culture both shapes and is shaped by:

— Leadership and behavior — including role modelling, decision-making, governance and values and employee behaviors and actions.

— Relationship with the outside world — including the organization's purpose and strategy and its relationship with its customers, the regulatory environment and the wider public.

— Physical environment — including office design and layout, office locations and tech-enabled ways of working (including virtual working).

— Stories and symbols — including what is displayed on the office walls, the type of language used, the work uniforms/attire, internal and external communication styles and organizational history.

— Structures, systems and processes — how a business organizes its people and activities to get work done — including decision-making fora, KPIs, performance management, reward, training programs, information flow, career pathways, recruitment and people development.

These are clearly not domains that can be quickly changed and leaders within the sector should pay closer attention to the underlying culture of their staff. Transforming an organization is always a challenge but aligning the culture with the vision or strategy improve the chances of success. Making steps to develop a positive culture that facilitates transformation will break down barriers that prevent a successful transformation.

Take action
KPMG's HSS peer network

Our survey clearly demonstrates that leaders within the human and social services sector face common challenges. Organizations have common development needs and areas of focus in the next few years so many leaders will be addressing similar questions.

The survey also shows that HSS leaders and organizations can benefit significantly from looking outside the sector. In areas such as innovation and data and analytics, we believe HSS organizations can develop skills and capabilities quickly by learning from peers in the private sector.

We have established a network to facilitate those conversations, and to enable HSS leaders to benefit from the experience of peers in the sector and beyond. The network facilitates conversations with global leaders and innovators in the public, private and not-for-profit sectors based on your specific challenges or goals.

The network is designed to link you to peers to enable knowledge-sharing, problem solving and to support the development and transformation of the HSS sector.

If you are interested in learning more about the network or have a challenge that you would like it to explore, we would love to hear from you. Please speak to your local KPMG contact or our global human and social services executive.

The untapped potential of data

> "Data helps us to understand our clients. Today we are using data on a cluster basis and create programs for certain groups of clients. It would be real progress for us to develop an individual client approach with the help of data and analytics."
>
> **German interviewee**

Human services organizations have unparalleled access to a huge amount of rich information regarding the vulnerable and disadvantaged people that they work with. They are able, and required, to understand current needs, how the person reached that point and to plan for and influence their future. They work with their acute needs but need to understand all of the important supporting areas of their life: physical health; mental health; family; relationships; housing; social life; and education. In a world that is driven by data, human services have huge amounts of untapped value.

The challenge that the sector faces is not access to data but using it effectively. Social and direct support workers have a deep and detailed understanding of the people they work which enables them to make the right decisions at the right time but their organizations often lack the systems and processes to capture that information. It is often lost on pieces of paper, in a case management system or, worse, not recorded and that affinity with the customer is lost when staff members move on.

The majority of CEOs in the sector do not believe that their organization is using data and analytics effectively. This is a particular concern for the sector because there are significant implications. Ineffective use of data in any sector can result in inefficient services that waste staff time and demotivate the workforce. In human services, such a weakness could result in a vulnerable person slipping through the net.

The sector knows this and is starting to change. 44 percent of CEOs ranked improving use of data and analytics in their top five priorities for reform in the next 3 years, compared to 25 percent of organizations outside of the sector.

Because the stakes are high, the rewards are also significant as effective use of data can strengthen customer affinity and help address the critical challenges of increasing demand for services and static or reduced budgets.

Demand data

Data is not an end in itself and should not be viewed as separate from the overall aim which is to deliver better outcomes. If an organization can unlock the treasure trove of information about the people who use its services, it can start to adapt and also influence demand.

Much of this information is likely to come from other organizations that work with the customer. The sector understands that many services and organizations each addressing one specific area of need is an inefficient and ineffective approach. This 'silo' working prevents a full understanding of the customer and their needs and risks them falling through gaps in the system. The sector is therefore moving towards more person-centered or place-based approaches by which the needs of a person or population are addressed in total, rather than through the lens of a specific service.

> " I would challenge those leaders who believe their D&A is effective. Do they fully understand what it can do? There are so many areas of untapped potential. For instance, can you hear the voice of a vulnerable child through data to flag early signs of abuse? "
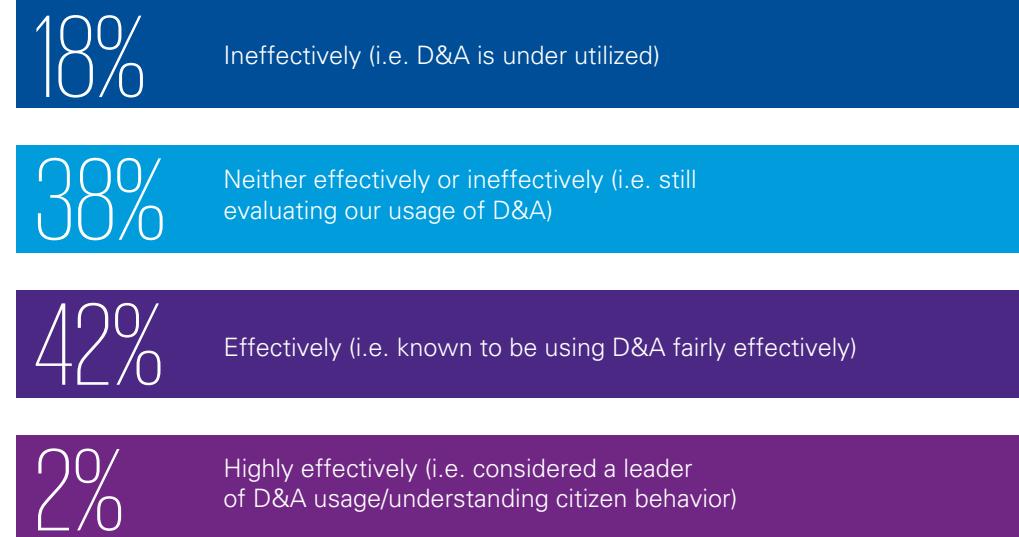
Martin Joyce
National Leader for Human and Social Services
KPMG in Canada
Hover for bio

How effectively is your organization using data and analytics (D&A) to improve performance?

18% Ineffectively (i.e. D&A is under utilized)

38% Neither effectively or ineffectively (i.e. still evaluating our usage of D&A)

42% Effectively (i.e. known to be using D&A fairly effectively)

2% Highly effectively (i.e. considered a leader of D&A usage/understanding citizen behavior)

Source: *KPMG Human and Social Services CEO Survey*, KPMG International, 2018

Creating a social data highway

The Social Investment Agency in New Zealand is operating a Data Exchange to securely share social sector data between agencies and providers. The exchange is hosted in the cloud and delivers near real-time feedback loops, enabling government and NGOs to speak to each other.

Initial tests of data sharing have been completed and in late 2017 the Data Exchange received approval to operate with sensitive information.

The representatives of each organization using the Data Exchange retain full control of the data they hold and share with others, and can stop sharing at any time.

The clear benefits of a central exchange are that it gives service providers more information about the people they are working with, it enables outcomes to be measured and services designed and improved accordingly. The exchange also supports information privacy and ensures that customers know how any data they provide will be used.

With a relatively small population and a high proportion of Maori people receiving services, New Zealand represents a key innovator in the human and social services sector. Developments such as the Data Exchange can set the precedent for other countries to follow.
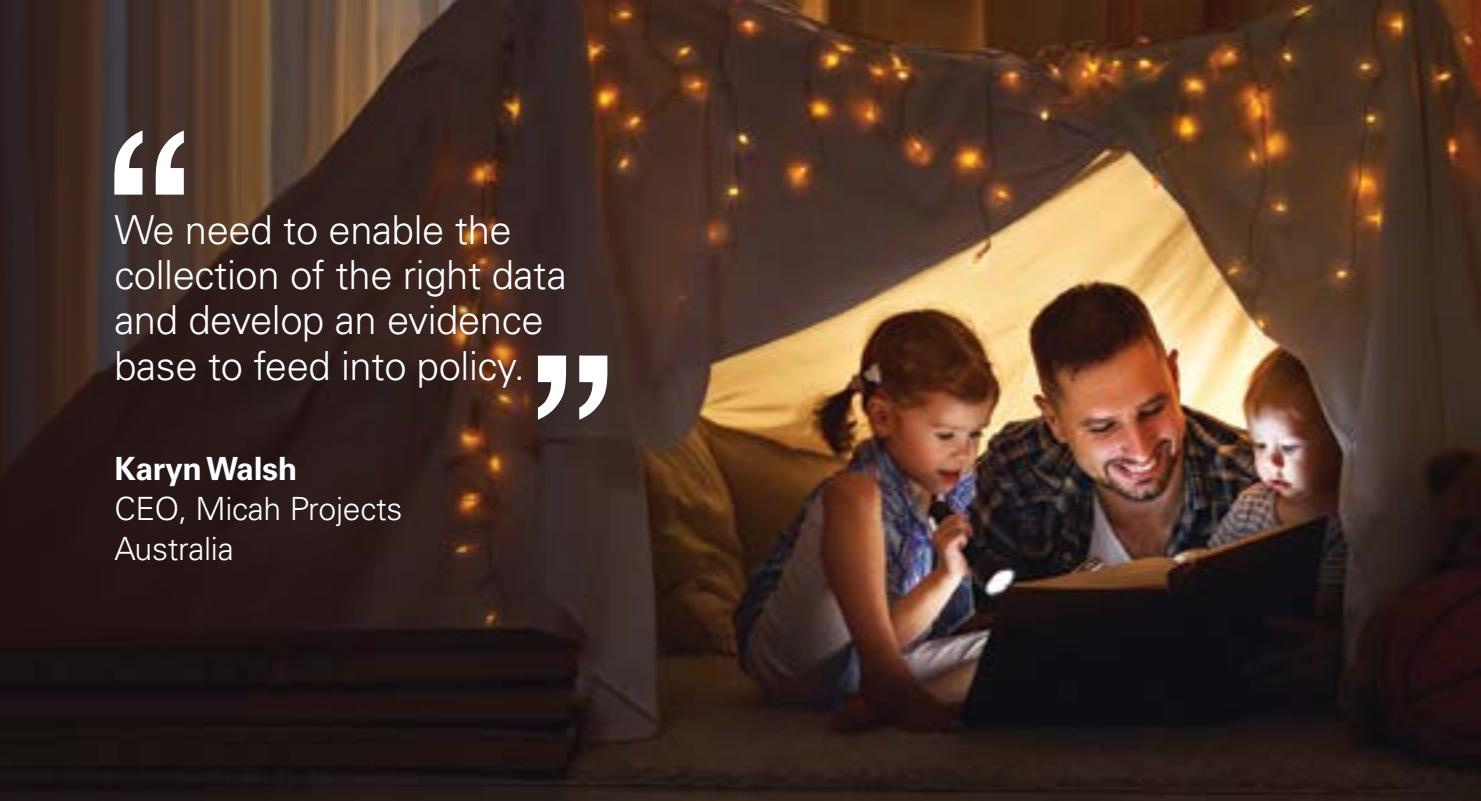
> "We need to enable the collection of the right data and develop an evidence base to feed into policy. "

Karyn Walsh
CEO, Micah Projects
Australia

Unfortunately, the sharing of data to support such joined-up working is lagging behind. Concerns regarding confidentiality, consent and privacy are justified and should be dealt with carefully but should not block the opportunity to really improve services. Information-sharing agreements and access controls can manage access to and usage of information to ensure that it is safe, justified and legal. Technology platforms work far more efficiently than liaison rooms and, critically, can show the customer how their data is being used. While data-sharing does pose risks, we currently have little real understanding about how much of our personal data is used. Data sharing is important in all sectors but human services is a sector that could benefit most from improved data sharing.

The first step is to develop *descriptive* data and analytics which enables an understanding of what is happening within the organization. Having a grasp of descriptive data enables an organization to understand who its customers are, the numbers accessing specific services, their needs, the costs and the outcomes that they are achieving.

Developing and analyzing good quality descriptive data over time naturally enables *predictive* analytics by which trends are identified and understood. This allows an organization to predict the future with a degree of accuracy which assists with planning and development.

From there, an organization can proactively move many of its services towards early intervention with an evidence base that gives confidence to invest in services that will support people at risk of presenting with higher needs later on. This is the final stage in which data has become *prescriptive* and can test hypotheses and provide advice, but it requires a complex and very mature data system.
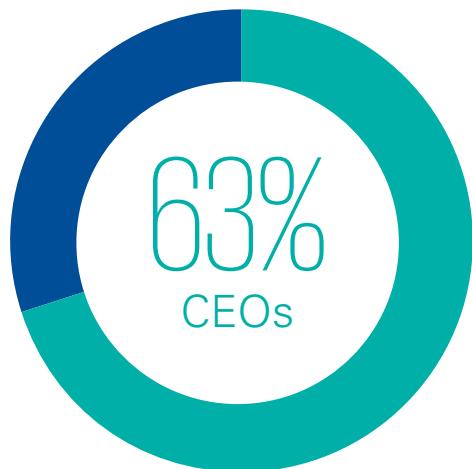
Dollar data

If every dollar spent in the human services ecosystem could achieve the maximum possible improvement in outcomes for the customer then leaders can rest comfortably. This is unlikely, even for the 2 percent of CEOs who class their data and analytics as highly effective, but a critical first step is to link spend, activity and outcomes data. Without these linkages, organizations cannot understand the impact that they are having and the outcomes they are achieving which makes it hard to make informed decisions about services and where to invest.

Services are under pressure or at risk because of constrained budgets and decisions about services are likely to receive public attention. Those decisions need to be well informed and leaders need quality data to understand the implications of service changes.

Once an organization is starting to use the data at its fingertips, developing and expanding that capacity is easy and a natural progression. While the sector has been slower to make the most of data, it is catching up and exciting and innovative uses will follow.

63% CEOs

Sharing of data is seen as very important to driving successful innovation by 63% CEOs

56% organizations

do not believe that they use data and analytics effectively to drive performance.

Source: *KPMG Human and Social Services CEO Survey*, KPMG International, 2018

> "Achieving outcomes for people requires policies and programs to be smarter and to make every dollar count."

Paul Hencoski
Head of Health and Human Services KPMG in the US
Hover for bio

Insights from case notes

KPMG in Australia is developing the ability to make data within case notes searchable, which can unlock a wealth of valuable and potentially critically important information.

Currently, many case management systems contain case note material in a range of formats including scanned paper files, images and audio files. In a pilot, KPMG found that a child in the child protection system has an average of 1,600 case notes, and some have well over 2,500 case notes.

Much of the information captured within case notes is not searchable and therefore, inaccessible for analysis, unless a caseworker invests significant time in manually reviewing each file.

KPMG professionals ran a pilot program that converted all case note content into a searchable format, to develop new concepts and capture new data points, such as the voice of the child, and to better understand the networks of vulnerable children. The pilot also found that enabling these capabilities is both straightforward and highly cost effective.

The potential benefits of developing these capabilities goes far beyond audit trails, enhanced analytics and legal proceedings. When a case management system is fully searchable, perpetrators can be identified, new trends can be discovered, and the child's voice can be heard throughout their interactions with services. In short, enhancing the insights that can be gained from case notes can provide a cost effective way to achieve better outcomes for children and their families.

Identifying high cost service users

KPMG in the UK has designed a methodology to help support population health management initiatives, underpinned by analytics. In the UK, local government and health services are being reorganized so they can focus on defining and meeting the needs of people and places for safer, higher-quality and more cost-effective care outcomes. The challenge is not limited to treating the sick in more effective ways but aims to maintain health and well-being by delivering services in the right way, at the right time, and in the right place so that the health of populations is managed as effectively and efficiently as possible. To achieve this goal, the care system as a whole needs to:

— understand the current state of demand

— model what that demand will look like in coming years

— develop transformation and efficiency plans

— reorganize the system to work radically differently.

The key to this is understanding where the system is challenged to provide effective care, why it is challenged and how it can be helped. This is a sophisticated problem because it requires an analysis of citizen lifestyles, demographics, use of public and private care services, and a detailed assessment of the capacity and cost that is currently being consumed.

In order to address this, KPMG in the UK facilitated the legal and effective sharing of data between stakeholders in the integrated care process, gathered data that was in the public domain, and merged it with data that could be gathered under the terms of our data sharing agreements.

From this, we created a cloud analytics platform that enabled further analysis of the consolidated data set. Using open data we were able to diagnose the challenges faced by care systems, generate a view of typical service users' challenges, and then suggest how a case for change could be created. We then modelled the case for change using different analytics approaches such as population segmentation, care pathway analysis, locality planning and risk assessment.

The output was a well-evidenced case for change, underpinned by, for example, capitated budgets so that plans for managing high-cost patients were robust. Following this, KPMG worked with the client to define indicators that enabled the care system to understand the outcomes it needed to deliver and track progress. The indicators were translated into contract metrics and underpinned payment incentives and the financial flows that were key instruments of change. Having supported the transformation, we then used our analysis of high-cost users to ensure the care system managed care in a sustainable way.

System-wide thinking to integrate and intervene

CEOs in the human services sector see early intervention and integration within human services and with the healthcare system as among the top opportunities for reform in the next 5 years. When seen from the perspective of the customer and through the lens of a single health and care system these two opportunities are deeply interlinked.

A system-wide perspective is critical to ensure that human services work effectively. For governments this may involve enabling data-sharing, managing the market or commissioning the right services at the right time. However, providers and non-government organizations can also think at a system level. Understanding the role of your organization in the ecosystem is critical to performing effectively. It enables an organization to manage demand for services, interact with related services to improve the quality of care and to ensure sustainability.

The need to intervene early is not an issue that organizations can manage on their own as it requires investment and commitment from across the health and care system. Few organizations provide the full spectrum of services from universal to specialist and across health and human services. Even fewer are the sole provider in their area so implementing change requires working with partner organizations.
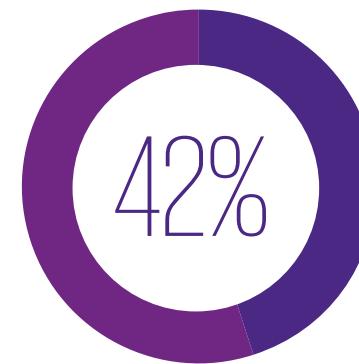
Integration is not necessarily the result of this but it does solve part of the financial issue, one of the key barriers to committing to early intervention. Early intervention requires upfront investment in services that are designed to reduce the workload of more intensive

45%
of HSS CEOs
see a greater focus on early intervention and prevention as the most important opportunity for reform in the sector.

42%
of CEOs
in the sector see lack of investment in early intervention as one of their most important challenges in the next 3 years.

Source: *KPMG Human and Social Services CEO Survey*, KPMG International, 2018

and acute parts of the health and care system. These are not always the organizations that provide the initial investment which significantly weakens the business case to invest in early intervention. If health and human service organizations are integrated, the improved outcomes and financial benefits that accompany them will eventually flow back to the pot from which the investment came.

Full system integration is not usually a viable option as it encompasses a huge variety of not-for-profit organizations, community organizations, caregivers and families, as well as governments and private providers. Instead, leaders in local systems should assess where organizational integration is needed and where the same benefits can be gained from dedicated formal liaison teams and pooled budgets. Closer working relationships are key but they also need to be supported by a degree of financial integration to ensure that budgets are big enough to invest and are able to generate meaningful improvements.

The key to any form of financial integration is a clear and fair mechanism for how the effects of the intervention will be measured and how rewards will be allocated. Small underspends or surpluses are quickly swallowed up by organizations under pressure and human services systems are not neatly linear to show the positive outcomes of prevention work. However, while the financial case is important, the clear aim of early intervention is to improve outcomes for people and so use of a proxy or an imperfect mechanism should not prevent leaders from acting to reform the system. Provided it is clear and agreed in advance, systems should act now.
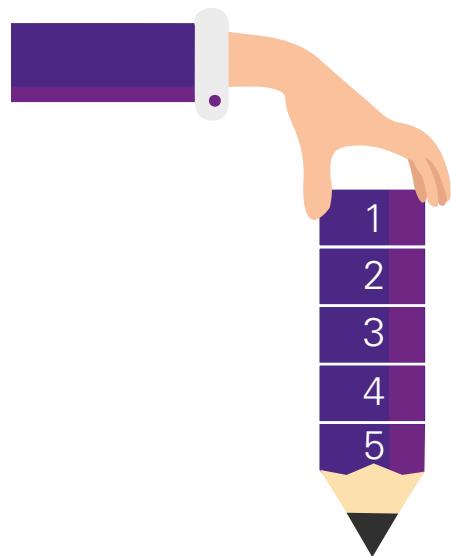
"Our biggest issue is the need to put people's needs and lived experience at the heart of service delivery and design."

Michael Hogan
Director, General Department of Communities,
Child Safety and Disability Services
Queensland, Australia
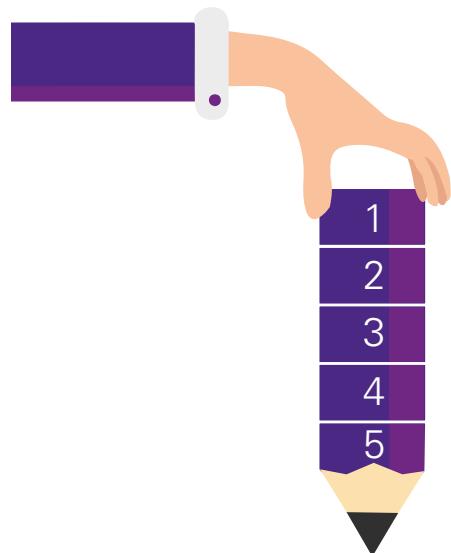
Survey highlight: What are the top five opportunities for reform?

in the human and social services sector over the long term/ the next 5 years?

1. A greater focus on early intervention and prevention
2. Greater integration across human and social services
3. Reorienting services and systems to be more person and client-centered
4. Stronger client focus
5. Improved integration between health and social care

for your organization over the short term/next 3 years?

1. Improved integration between health and social care
2. A greater focus on early intervention and prevention
3. Greater integration across human and social services
4. Stronger client focus
5. Improving system access and navigation — a greater focus on the citizen

Strategic innovation to unleash good ideas

The need for innovation is well understood and was rated as the second highest strategic priority for human services organizations and top ranked for global CEOs. It is seen as a panacea to address issues in the sector by improving how services and the system work.

While the need for innovative thinking and new approaches is increasing, the scope and opportunity for that innovation is shrinking. Gone are the days when local governments could rely on an in-house think tank to generate ideas and providers are too often constrained by budgets, regulation and maintaining statutory duties to explore and invest in new approaches.

The pressures that drive innovation make it a necessity rather than a luxury, and 29 percent of CEOs ranked fostering innovation in their top three strategic priorities for the

13% Human services organizations have a foundational approach to innovation and only 13% have a strategic approach

next 3 years. However, those same pressures mean that it has to be pursued in a purposeful manner. Companies and government agencies often make the mistake of viewing innovation as a set of unconstrained activities with no discipline.[1] This approach results in wasted time, a lack of ownership and innovative ideas being lost.

A truly effective use of innovation is to formalize the process as part of a strategic approach. This ensures that ideas are appropriately reviewed, tested and developed and ensures that lessons can be learned from that process.

Our survey found that 13 percent of human services organizations have a strategic approach to innovation

> " We need to take some risks around doing things differently. "

Stuart Cowley
Wigan Council
UK

[1] https://hbr.org/2017/09/what-your-innovation-process-should-look-like

whereby it is embedded in the organization. Innovation for these organizations is supported by strategic objectives, a defined approach, resources, leadership and efforts that are optimized based on internal and external feedback.

This is good news for these organizations but shows that the sector is lagging behind global trends. Outside of human services, 28 percent of CEOs reported that their approach to innovation was strategic and more mature in comparison to the human services category.

Embedding innovation in strategy encourages a culture in which new ideas are welcomed, explored and developed. This encourages more creative thinking and means that staff feel empowered to effect change in the organization. While the innovation approach must be strategic and implemented from the top, often the best ideas come from people delivering services and working with customers every day. Any innovation approach must ensure that their voices can be heard.

45 percent of human services organizations indicate they have a foundational approach to innovation. In these organizations, innovation is ad hoc, with innovation occurring on some projects or within some departments but no repeatable approach, formula or standardized tools and resources. This can make it inefficient though may be accepted for established or transactional areas.

Nearly 20 percent organizations have a weak approach to innovation which should concern the sector. At this end of the spectrum innovation ranges from 'incubation' where innovation is unpredictable, uncontrolled or reactive down to an organization with no conscious approach. The risks posed here are significant. Doing nothing is not a luxury that many organizations in the sector can afford and risks further weakening their ability to adapt and respond to market conditions, pressures and other changes to the ecosystem. An organization that doesn't nurture innovation will struggle to motivate staff and will lose talent to places where their ideas are more appreciated.

> " Things have changed in terms of leadership in the sector. There is more recognition of the importance of being collectively successful rather than the 'one leader in control' model of the past. "

Allison Bond
Deputy Minister
Ministry of Children and Family Development
British Columbia

What is a strategic approach to innovation?

The raw seed of innovation must come from the people of an organization and be enabled by a culture which welcomes new ideas, new thinking and new perspectives. This culture is driven by leaders, having access to enough accurate information, engaging with the community, ensuring a 'safe to fail' environment and providing the right incentives to stimulate innovative thinking.

Growing that seed through a strategic approach requires the following:

1. **Build it into your strategic objectives:** set targets and goals around it and make it part of daily jobs and the operations of the organization

2. **Define your approach:** ensure there is a pathway with milestones and checks to ensure that an idea is given constructive review and that it maintains progress. A formal approach is needed to ensure that innovations are given robust but fair challenge.
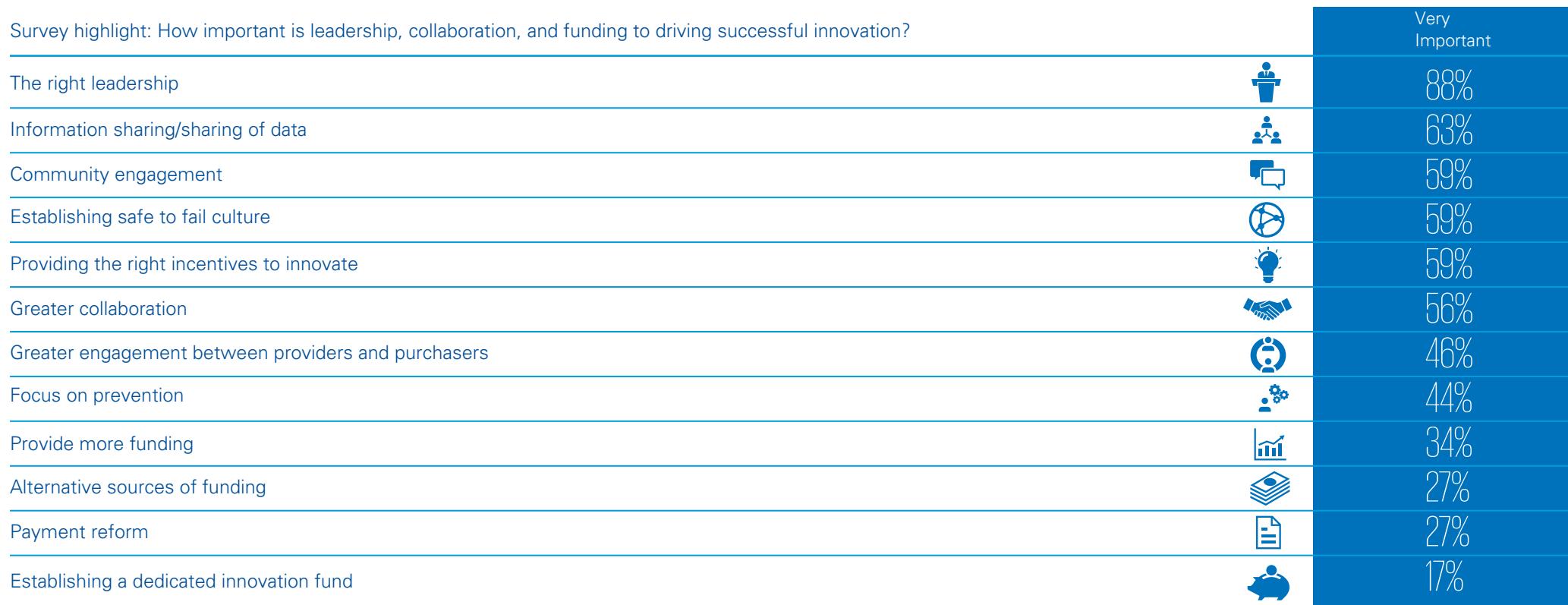
3. **Resource the idea**: a small amount of dedicated time to develop and challenge an idea is far more efficient than it sitting on the side of a desk

4. **Lead it:** leaders are key to setting the tone, and are the most important factor in an organization's ability to drive successful innovation. The nature of leadership in the sector is changing and leaders need to adapt with it to remain relevant and effective.

   For more information on how, see *Developing a new generation of human services leaders*.

5. **Listen to internal and external feedback on your idea.** The idea may need to be refined, improved or scrapped and engaging with feedback is the quickest way to realize that.

Survey highlight: How important is leadership, collaboration, and funding to driving successful innovation?		Very Important
The right leadership		88%
Information sharing/sharing of data		63%
Community engagement		59%
Establishing safe to fail culture		59%
Providing the right incentives to innovate		59%
Greater collaboration		56%
Greater engagement between providers and purchasers		46%
Focus on prevention		44%
Provide more funding		34%
Alternative sources of funding		27%
Payment reform		27%
Establishing a dedicated innovation fund		17%

Source: *KPMG Human and Social Services CEO Survey*, KPMG International, 2018

> " We live in an exciting time characterized by disruptive elements which gives the sector an opportunity to take a fresh look at systemic problems. "

Torsten Müller
Director, Human and Social Services
KPMG in Germany
Hover for bio

> "
> New approaches, new technology and new ideas enable us to address old and embedded societal issues. "
>
> **Nilachal Mishra**
> Human and Social Services Lead
> KPMG in India
> **Hover for bio**

Domains of innovation within Human and Social Services

Technology: Relatively simple mobile technology can revolutionize the delivery of key human and social services. The 'early years pathway' in the UK is nationally prescribed but, in many authorities, is littered with paper forms and spreadsheets. Diona has developed an app that enables workers to easily and securely log their visits which ensures that information about the development of the child is available on visits, is quickly and efficiently stored and which can plan and structure the working day.

Data use: There is a clear link between areas of deprivation and use of services, yet services are rarely aligned with that need. A place-leader that can review levels of activity, the location of services and underlying deprivation can provide services closer to home, reducing travel time for staff and customers.

Purpose and role: In a world where some care centers provide medical care but no beds, the sector has an opportunity to rethink the most effective way to support people. Many local and city government organizations are developing 'housing first' models to directly address the housing needs of vulnerable people and those with complex needs. Housing and shelter is critical to preventing a spiral of need and it represents an important early intervention.

Workforce model: The Buurtzorg model, originally developed to provide neighborhood care in the Netherlands, delivers care through small self-managing teams aiming to build independence for customers. The approach starts from the client perspective and teams fill the gap between what a customer can do themselves or with their informal network, and receiving formal support. These teams are supported by IT systems that enable them to care and manage themselves remotely. Agile technology, the Internet of Things and the commoditization of work give greater flexibility to innovative workforce models.

Funding approach: Impact investing is a rapidly growing area enabling private capital to be used to address typically public sector issues. An effective deal provides a financial return on investment while improving outcomes and service delivery. Impact investing can unblock services or sectors that are under pressure from budgetary cuts. Learn more about Impact Investing.
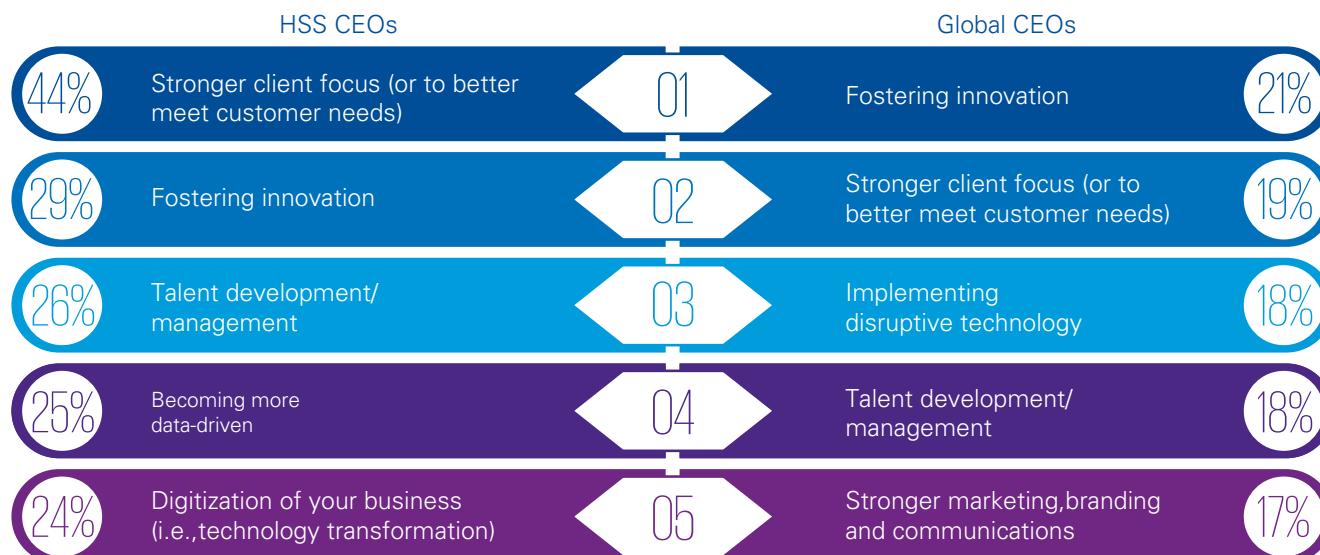
For more information on Blockchain and Artificial Intelligence as innovative tools within human services see
_Are Intelligent Automation & Blockchain Poised to Disrupt HHS?_

Comparing outside the sector

KPMG publishes an annual study into the outlook of private sector CEOs and the 2017 edition was based on in-depth interviews with nearly 1,300 CEOs who are leading some of the world's largest companies. The *Human and Social Services CEO Survey* is structured in a similar way which enables us to compare the views of leaders in the sector to the wider economy.

We have directly compared some of the key questions common to both surveys below. Overall the human and social services sector is less mature with regard to innovation and use of data but has a clear, sector-wide priority to better meet customer needs and develop a stronger client focus. Using that priority to guide organizations will ensure that services become more customer-centered and more effective in the future.

Strategic priorities

44 percent of the HSS CEOs surveyed view strengthening client focus and customer needs as the sector's top priority for the next 3 years. By contrast, innovation was cited as the second priority which only received 29 percent. This 15 percentage point difference demonstrates just how important meeting customer needs is for the sector, strategic priorities were separated by four percentage points or less.

Client focus is also important for other sectors though only 19 percent of CEOs rated it in their top three priorities for their organization over the next 3 years.

The human services sector and global CEOs both rated client focus, innovation and talent development in the top five strategic priorities, though with different degrees of importance.

Human services also prioritized becoming data driven and digitization whereas global CEOs prioritized disruptive technology and market, branding and communications.

Innovation

The human services sector's approach to innovation could be characterized as foundational which is a less mature approach than in other sectors where it tends to be accelerated.

The human services sector is tightly bunched in the foundational category whereas innovation in the wider economy is more evenly spread across more mature innovation approaches.

What are the top 3 strategic priorities for your organization over the next 3 years?

HSS CEOs		Global CEOs
44% Stronger client focus (or to better meet customer needs)	01	Fostering innovation **21%**
29% Fostering innovation	02	Stronger client focus (or to better meet customer needs) **19%**
26% Talent development/management	03	Implementing disruptive technology **18%**
25% Becoming more data-driven	04	Talent development/management **18%**
24% Digitization of your business (i.e., technology transformation)	05	Stronger marketing, branding and communications **17%**

Source: *KPMG Human and Social Services CEO Survey*, KPMG International, 2018

> "
> The world is changing rapidly. Vulnerable and disadvantaged people are at risk of being left out or left behind. Innovation isn't always about 'something big'. Human services organizations can achieve innovation daily through challenging the way they think, problem solving and maximizing the capabilities of their people. "
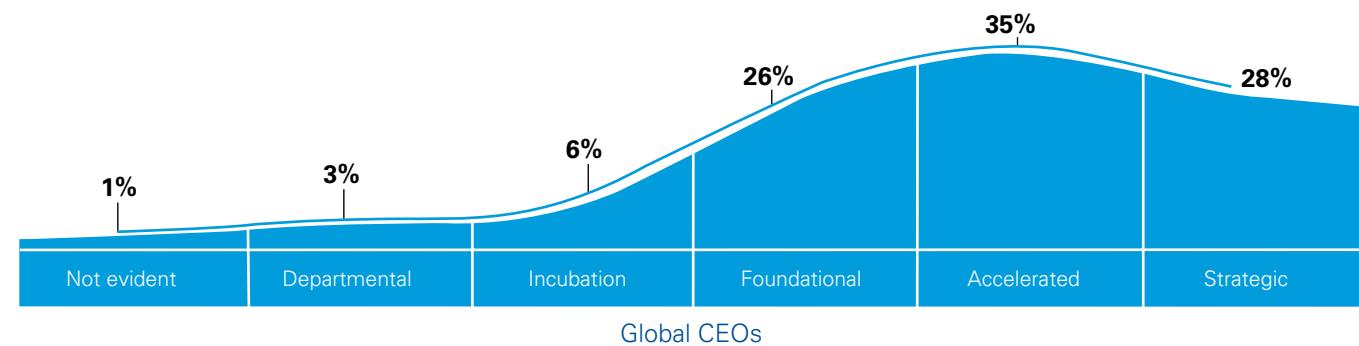
Kerry McGough
National Leader for Health, Ageing and Human Services
KPMG in Australia
Hover for bio

Approach to innovation

Not evident	Departmental	Incubation	Foundational	Accelerated	Strategic
3%	8%	8%	45%	23%	13%

HSS CEOs

Not evident	Departmental	Incubation	Foundational	Accelerated	Strategic
1%	3%	6%	26%	35%	28%

Global CEOs

Source: *KPMG Human and Social Services CEO Survey*, KPMG International, 2018

Data

56 percent of human services CEOs do not believe their organizations use data effectively to drive performance. This is also true outside of human services: almost half of CEOs (45 percent) say their customer insight is hindered by a lack of quality data. And 56 percent express concern about the integrity of the data upon which they base decisions.

Conclusion

Pressure is mounting on human services. In some regions this pressure has reached a crisis point and other regions should learn from that experience and reform early to avoid following that path.

The sector has traditionally been more conservative and slow to change than the global economy due to the nature of the services it provides and the people it serves. It is therefore slightly behind with regard to data, analytics and innovation, which can all offer great opportunities to improve the quality of services.

Underlying all of those improvements is the need to better understand customers. Developing affinity with their needs and expectations will enable the system to be more targeted, efficient and to achieve positive outcomes. It is not a quick fix and requires synthesis of large volumes of complex information but, when achieved, enables an organization to transform services, processes and structures with confidence.

Data is key to developing customer affinity and it is critical to map spend and investment against the demand and outcomes achieved. The ambition of data should be to move towards prescriptive approaches but our findings demonstrate that there is significant scope to improve mapping of spend, activity and outcomes in a descriptive manner.

The next step is to understand how customer needs will develop and to intervene early in that development. Leaders can review how well the system rewards and incentivizes early intervention and prevention work.

Our survey shows that leaders of human services organizations and systems across the world understand the need for change and broadly agree on their priorities. This is positive but will only result in better outcomes and services if the sector is able to respond and changes are made. We look forward to future surveys and to seeing the effects of these reforms and transformations.

Key survey findings

Participants were invited to rank the top five challenges facing their organization in the next 3 years. Overwhelmingly, the response was that funding is not expected to keep pace with increasing demand and complexity of need. Investment in prevention and early intervention services were also cited as key challenges.

The survey also identified that organizations faced challenges around the cultural aspects of reform and their ability to achieve transformation or large-scale change.

In response to these challenges, CEOs prioritized a stronger client focus as their strategic priority for the next 3 years.

They also prioritize innovation, talent development, data capabilities and digitization in the short term.

What are the top five challenges for your organization over the next 3 years?

1. Funding not keeping pace with increasing demand
2. Increasing demand from citizens
3. Lack of investment in prevention and early intervention
4. Bureaucracy — slow pace of change and inability to act quickly
5. Cultural change required to enable reform

What are the top five strategic priorities for your organization over the next 3 years?

1. Stronger client focus (or to better meet customer needs)
2. Fostering innovation
3. Talent development/management
4. Becoming more data-driven
5. Digitization of your business (i.e. technology transformation)

Leaders within the sector see opportunities for reform in integration across human services between health and social care. There is a clear need to focus and invest in early intervention and prevention services and CEOs see the need to reform by focusing on their clients and improving how well the system is designed for them.

The opportunities for organizations broadly align with the opportunities for the human and social services sector as a whole. This demonstrates the need for and benefit of working together at a system or place to address both the needs of customers and of organizations.

What are the top five opportunities for reform for your organization over the next 3 years?

1. Improved integration between health and social care
2. A greater focus on early intervention and prevention
3. Greater integration across human and social services
4. Stronger client focus
5. Improving system access and navigation — a greater focus on the citizen

What are the top five opportunities for reform in the human and social services sector over the next 5 years?

1. A greater focus on early intervention and prevention
2. Greater integration across human and social services
3. Reorienting services and systems to be more person and client-centered
4. Stronger client focus
5. Improved integration between health and social care

Related reading

@gov: Open for disruption
This edition of @gov, KPMG's global magazine for governments, explores how the public sector is harnessing disruption as an opportunity to transform. We take a look at how governments are becoming digital leaders and market architects, re-thinking approaches to service delivery while staying on top of emerging trends and threats. A main topic of discussion is the role of the public sector CIO. In an interview with Alex Benay, Canada's chief information officer, we hear how one such leader plans to revolutionize a country's approach to data, using a concept he calls "open by default". (December 2017)

@gov: Data-driven government
The second edition of @gov focused on data driven government. Here we explore topics that highlight the many tangible benefits and challenges that data analytics projects can provide to governments as they strive to offer more responsive, relevant services to citizens, and at the same time improve their own operational efficiency. We profile several successful initiatives from smart transit apps to predictive analytics programs and also provide discuss the challenges still facing many government agencies, with practical next steps based on experience with a range of government and private sector clients. (April 2017)

Are Intelligent Automation and Blockchain Poised to Disrupt HHS?
To profile the current state of intelligent automation and blockchain exploration and adoption in US state health and human services agencies, KPMG in the US collaborated with the Governing Institute to conduct a national survey of government executives. The result is a snapshot of where departments stand in their exploration of these technologies, practical use cases within HHS programs, and possible benefits and barriers government organizations may encounter during pilots and implementations. (October 2017)

The transformative power of technology: Innovations in human services delivery
A report highlighting many of the tangible benefits that current digital technologies can provide to governments as they strive to offer more responsive, relevant services to citizens, and at the same time confront the challenge of delivering greater value with fewer resources. This report profiles successful digital initiatives by various national, state and local health and social service providers — from dynamic mobile service delivery apps to predictive analytics programs to forecast future service demand. (September 2016)

Unleashing value: Commissioning in the human services ecosystem
In this report, we outline the key drivers for this change and how governments should break down barriers to foster it. We explore the respective roles of the citizen customer, government, providers and leaders in a developing commissioning system before presenting a brief roadmap for effective commissioning in human services. (September 2017)

Appendix: About the survey

The inaugural *KPMG Human and Social Services Outlook Survey* was conducted in August and September 2017 by KPMG International. It will be run biannually to track trends and developments across the sector.
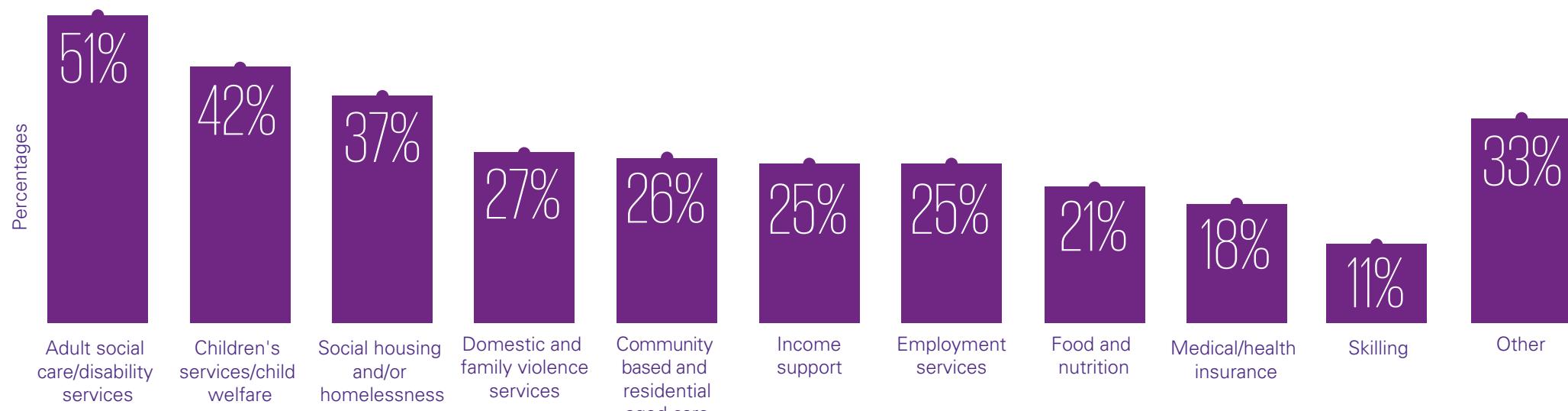
The purpose was to understand the challenges that the sector faces, the opportunities for reform that they present and the strategic priorities of organizations. There were also specific questions to understand the position of the sector regarding innovation, data and analytics and change management capabilities.

The survey was targeted at CEO and senior executive level participants in the human services sector including government, not-for-profit, donor and for-profit clients. It received 109 responses from participants in Australia, Canada, India, Germany, UK and US and the data received has been screened for country biases, given that equal numbers of participants were not received from each country.

The survey was supplemented by interviews with individuals in the sector to better understand their perspectives. We would like to thank everyone who participated in the survey and follow-up interviews. The survey will be performed again in 2019 to track how the sector is developing and to understand the new issues that it faces.
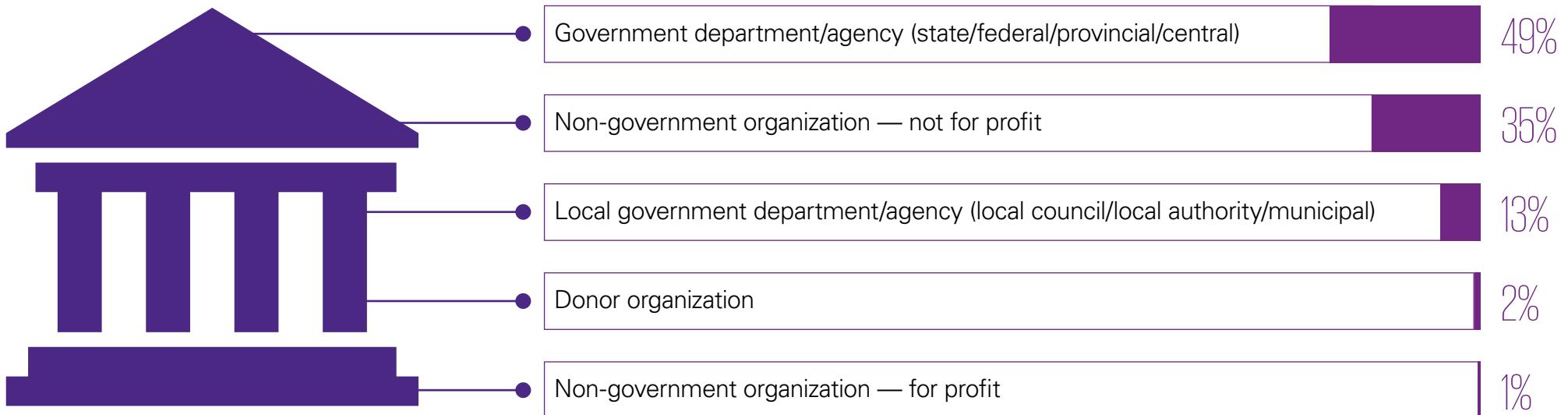
Surveyed organizations by focus area

Bar chart — Percentages:
- Adult social care/disability services: 51%
- Children's services/child welfare: 42%
- Social housing and/or homelessness: 37%
- Domestic and family violence services: 27%
- Community based and residential aged care: 26%
- Income support: 25%
- Employment services: 25%
- Food and nutrition: 21%
- Medical/health insurance: 18%
- Skilling: 11%
- Other: 33%

Note: Multiple responses allowed

Source: *KPMG Human and Social Services CEO Survey*, KPMG International, 2018

Surveyed organizations by type
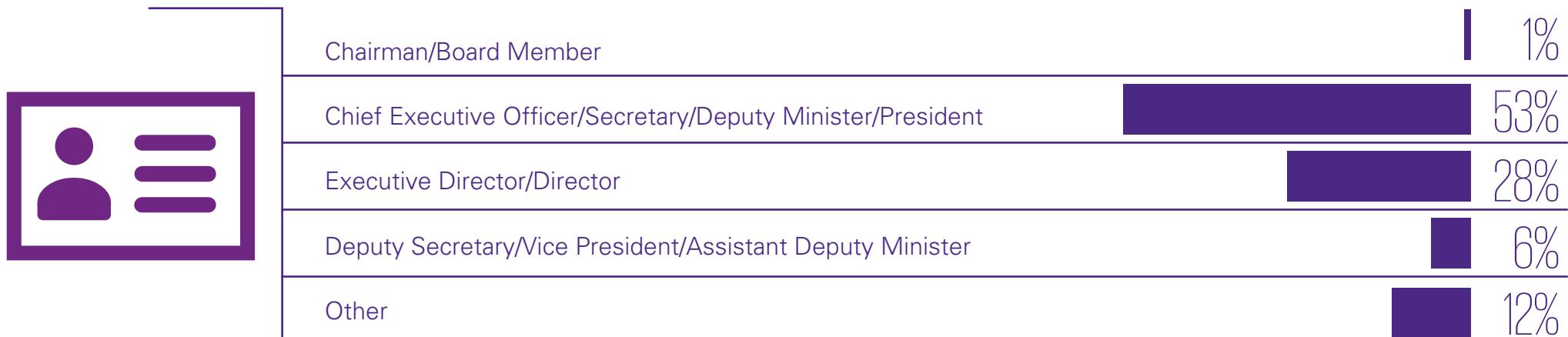
Organization type	Percentage
Government department/agency (state/federal/provincial/central)	49%
Non-government organization — not for profit	35%
Local government department/agency (local council/local authority/municipal)	13%
Donor organization	2%
Non-government organization — for profit	1%

Source: *KPMG Human and Social Services CEO Survey*, KPMG International, 2018

Surveyed organizations by annual budget allocation (USD)

Budget allocation	Percentage
$499 million or less	47%
$500–$799 million	5%
$800–$999 million	8%
$1–$4.9 billion	26%
$5–$9.9 billion	2%
$10–$19.9 billion	4%
$20–$49.9 billion	6%
$50–$99.9 billion	1%
$100 billion or more	1%

Source: *KPMG Human and Social Services CEO Survey*, KPMG International, 2018

Survey respondent by position

Position	Percentage
Chairman/Board Member	1%
Chief Executive Officer/Secretary/Deputy Minister/President	53%
Executive Director/Director	28%
Deputy Secretary/Vice President/Assistant Deputy Minister	6%
Other	12%

Note: Percentages may not add up to 100 due to rounding off
Source: *KPMG Human and Social Services CEO Survey*, KPMG International, 2018

KPMG contributors

Liz Forsyth
Global Human and Social Services Lead

Liz has over 25 years of human and social services sector experience and knowledge, starting her career as a social worker. Liz's driving passion is in social policy reform, specifically in working with people who are vulnerable, disadvantaged and have a disability.

Liz leads the KPMG health and human services practice in Australia and has worked across the ecosystem from strategy development, through service design to evaluation and review for government, non-government and not-for-profit organizations across Australia.

She also leads the KPMG global human and social services network which brings the best of innovation, design and development from human services across the globe to each member firm. She has directly supported and advised human services systems across the world and believes passionately in the value of sharing knowledge and understanding between organizations, systems and leaders.

Paul Hencoski
Head of Health and Human Services
KPMG in the US

With a long record of public service, predominantly at the state level, Paul leverages his experience to provide insightful advice in areas such as quality assurance monitoring, systems integration, project management, change management, strategic planning and risk and issue management. Paul's more recent experience includes the leadership of projects with US Health and Human Services (HHS) clients at both the local and state levels, as well as various provincial and federal initiatives in Canada. He has also supported systems implementation programs at the State of New York's Statewide Welfare Management program.

Martin Joyce
National Leader for Human and Social Services
KPMG in Canada

Martin is a highly experienced executive across Government, non-government and commercial sectors (not-for-profit and community leadership positions), Martin has led teams while undertaking transformational change and building growth agenda's for organizations — including 13 years at KPMG in Australia leading the build of the Human and Social Services practice across KPMG.

Kerry McGough
National Leader for Health, Ageing and Human Services
KPMG in Australia

Kerry's specializes in policy and strategy, system design and reform, service improvement, evaluation, commissioning and market analytics in any areas of interest related to vulnerability, disadvantage, disability and equity. Kerry has spent her working career in social services with more than 25 years' experience in the delivery of advisory services to public sector agencies and non-government organizations. This includes extensive experience working with senior government executives and a range of stakeholder groups including non-government service providers and people accessing supports and services within the Australian community.

Nilachal Mishra
Human and Social Services Lead
KPMG in India

Nilachal has over 18 years of experience advising governments and leads the KPMG Human & Social Services practice in India. He has extensive experience of working with government, non-government and corporate clients and has led large-scale projects in the areas of water and sanitation, skill development and women and child development in India. His areas of expertise include capacity building, change management, strategy formulation, process re-engineering, policy formulation, project management, monitoring and evaluation.

Torsten Müller
Director, Human and Social Services
KPMG in Germany

Torsten has a long record of professional experience in Public Sector consulting. He has led large-scale projects in the field of health and social insurances such as organizational transformation projects. His field of expertise ranges among others from system integration and strategic program management to change management. With his passion for innovation and his strive for excellence he helps to transform customer needs into high-level results.

Jason Parker
Head of Health and Human Services
KPMG in the UK

Jason leads a team that specializes in NHS acute hospital quality and performance improvement. He has 20 years of NHS advisory experience and is a qualified accountant. He co-leads KPMG's Healthcare Operational Excellence team globally. Jason has led over 80 major performance improvement projects with heath organizations.

Claire Sime
Director, Health, Ageing and Human Services
KPMG in Australia

Claire specializes in transformation and people and change issues in the human and social services sector and has led transformation work for a range of government and not-for-profit organizations.

KPMG's Global Human and Social Services Network

KPMG is committed to the human and social services sector and is proud of its track record advising government and the public sector on the transformation, design, implementation, and operations of programs meant to serve the world's most vulnerable populations.

We work with a range of people who are vulnerable, disadvantaged, or have complex needs, across a range of service systems including:

— Children's services

— Social and public housing

— Domestic and family violence services

— Adult social care

— Aged care

— Income support services

— Employment services

— Food and nutritional services

— Not-for-profit sector.

Our Global Human and Social Services Network brings together our diverse capabilities and experience to provide our clients with a truly global perspective. Through our global experience of working with a wide range of systems and services we know the critical importance of designing care and support with the customer at its core. We reflect that by ensuring that the customer is at the core of our work, particularly when helping and enabling an organization to transform.

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