

Inclusion Melbourne – Final Report

EMPOWERMENT FUND

Project summary

Inclusion Melbourne upgraded its practice systems (Brevity CRM and SharePoint) to better capture the right information at intake and planning in our work with people with intellectual and cognitive disability. These upgrades have also allowed us to identify risk and rights issues earlier and link everyday case notes to each person's NDIS and personal goals – all aligned with our Practice Framework.

The work produced eight practical “system hacks” that any provider can adapt to strengthen person-centred, rights-based, and outcomes focused practice. A public-facing guide, *Hack Your Practice System*, summarises the approach and lessons learned.

Key achievements/findings

The project saw Inclusion Melbourne:

- Reconfigure our Brevity CRM platform and Sharepoint to enable consistent, end-to-end data capture across enquiry, intake, support planning and case notes.
- Introduce multi-trigger tag/flag rules to make key risks visible (e.g., autonomy, isolation, Behaviour Support Plan gaps) and prompt early intervention.
- Redesign note-taking prompts to link daily support to NDIS and personal goals, with a flow on effect being the strengthening of staff capability.
- Complete a public-facing guide, *Hack Your Practice System*, to support sector adoption.

Insights

Learnings for the Organisation

Inclusion Melbourne implemented system upgrades that demonstrated how:

- Good systems can allow for better communication and consistency of support in relation to a person's identity, preferences, and risks across time and teams.
- Embedding Supported Decision Making, Positive Behaviour Support checks, and values (such as a commitment to rights, dignity, and full citizenship) inside workflows yields more consistent decisions and outcomes in frontline work.

- Intake and planning tools that map directly into CRM fields reduce duplication and improve data quality for outcomes tracking. It must also be noted that many disability support providers currently use CRMs that do not allow for this functionality, so care is needed when negotiating customisations.

Learnings for the broader social services sector

Service quality, safeguarding, and capacity building in support service delivery to people with intellectual and cognitive disability are strengthened when evidence-based practices, regulatory requirements, and rights-oriented capacity building are woven into well-designed systems and everyday practice procedures.

This project showed that thoughtful organisational design and the use of clever tags, flags, prompts, questions, and templates can be used to greatly lift quality and outcomes without necessarily requiring staff to absorb substantially more content or build broad new skill sets. When tools connect intake, planning, behaviour support, and daily records, information flows smoothly, reducing risk and duplication.

However, implementing Inclusion Melbourne's 'practice system hacks' requires providers to have strong practice leadership, clear governance, and the technical capability to align their systems with rights-based standards. They need to have a strong commitment to human rights, full citizenship, enfranchisement, and the self-determination of people with intellectual and cognitive disability.

Enquiries

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