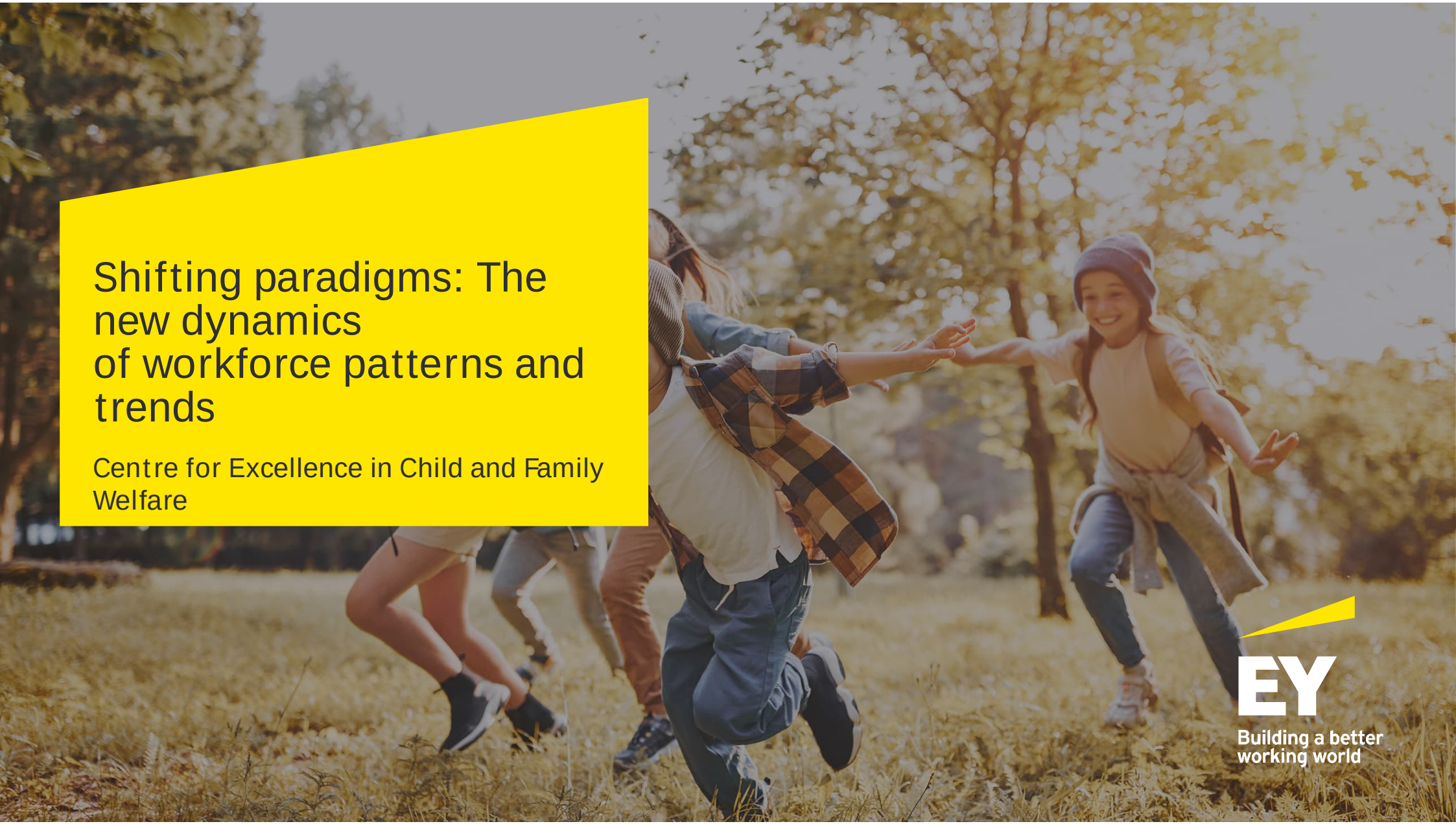


Shifting paradigms: The new dynamics of workforce patterns and trends

Centre for Excellence in Child and Family Welfare

EY
Building a better working world

Introductions



Sonia Sharp
EY - Melbourne, Australia

Partner, People Consulting
Oceania Government and Health Sciences Lead



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EY - Melbourne, Australia

Partner, People Consulting
Government and Health Sciences

Acknowledgement of Country

We would like to acknowledge the traditional owners and custodians of the land on which we are meeting on, in Melbourne that is the land belonging to the Wurundjeri people of the Kulin Nation. We would like to pay respects to elder's past, present and emerging, and to acknowledge any Aboriginal or Torres Strait Islander people.



Vast Stretch of Country (PJ Kemarre), First Nations man and EY Technology Consultant) Commissioned by EY to visually represent EY's Reconciliation Action Plan, 2021

Agenda

Global Workforce Patterns and Trends

- *The latest evidence, patterns and trends across workforces globally*
- *Innovative workforce strategies from around the world*

Shifting paradigms and emerging themes

Next steps and actionable insights

- *Call to action for collaboration, innovation and automation – the human approach*

You tell us...



Whose land are you dialling in from?



What are you hoping to learn about today?


Shifting paradigms:
Global workforce
patterns and trends
The better the question. The better the answer.
The better the world works.
EY

EY teams conducted Work Reimagined Surveys over the last three years to understand the rapidly shifting landscape of the future of work



- Global reach into 135 countries
- Gathering data and insights every 6 months
- 17,000 employees
- 1,575 employers
- Deep dive into 23 ‘focus’ countries
- Insights on global talent, workforce, mobility, flexibility patterns and trends

Source: EY Work Reimagined 2023

Global Workforce Patterns and Trends

There are five key paradigm shifts across workforces and sectors globally.

1. Shifting Paradigm 1: The need for a radically different approach
2. Shifting Paradigm 2: The hybrid, multi-generational workplace
3. Shifting Paradigm 3: The technology and AI revolution
4. Shifting Paradigm 4: The changing balance of power
5. Shifting Paradigm 5: Psychosocial safety in the workplace


Shifting paradigm 1:
The need for a radically different approach to workforce


-3%
Decline in Victorian birth rate from 2021-2022
Source: Australian Bureau of Statistics 2023

We are both living longer and working longer…..



Life expectancy - women



Life expectancy – First Nations women



Average Retirement age

Source: Australian Bureau of Statistics 2023



Life expectancy - men



Life expectancy – First Nations men

Source: Australian Bureau of Statistics 2022

Source: Australian Institute of Health and Welfare 2022



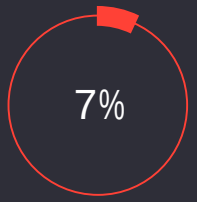
Source: Australian Government Centre for Population, 2023 Intergenerational Report: population predictions Australia

Interstate migration compounds our workforce challenges further…..



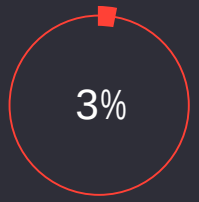
Source: SBS News, Australian Bureau of Statistics 2021

We are facing steeply growing demand for community services



Forecast annual growth in demand for community services

Source: EY Power BI Modelling



Of community services can meet demand

Source: ACOSS 2022



Of community services anticipate growth in demand

Source: ACOSS 2022

Canada

Canada is expecting a 10% gap in the supply and demand between 2022-2031 for community services roles, with moderate job prospects across the country.

Source: Job Bank Canada 2022

UK

A growing workforce gap facing social care in England over the next decade - Up to 627,000 extra social care staff would be needed to improve services and meet need – a 55% growth over the next decade and 4 times greater than the increases of the last ten years.

Source: Health Foundation 2021

There is increasing competition for workforce across sectors

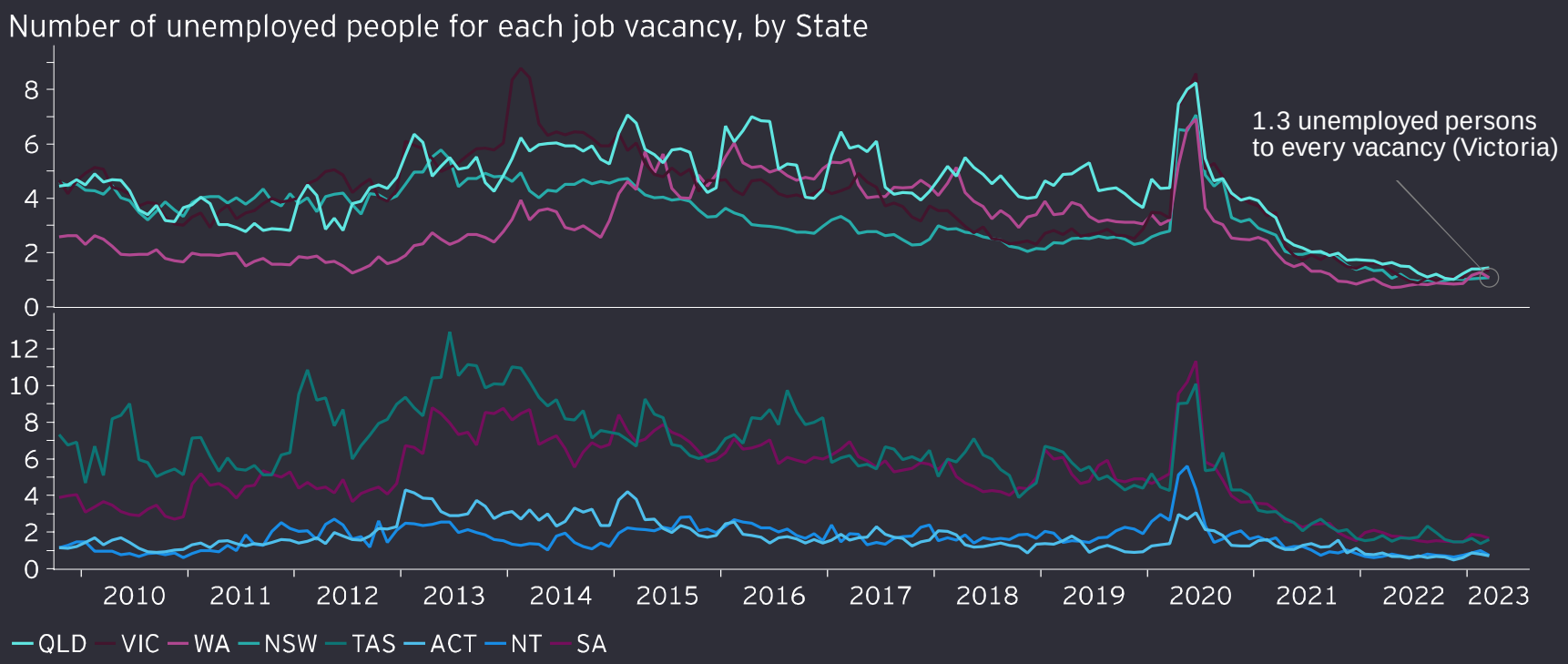






Challenges securing workers abound….so people will jump if you don’t look after them well

The ratio of unemployed people to job vacancy is very low, especially in VIC, NSW, ACT and NT



Source: Macrobond, EY & Victorian State of the Labour Market 2023

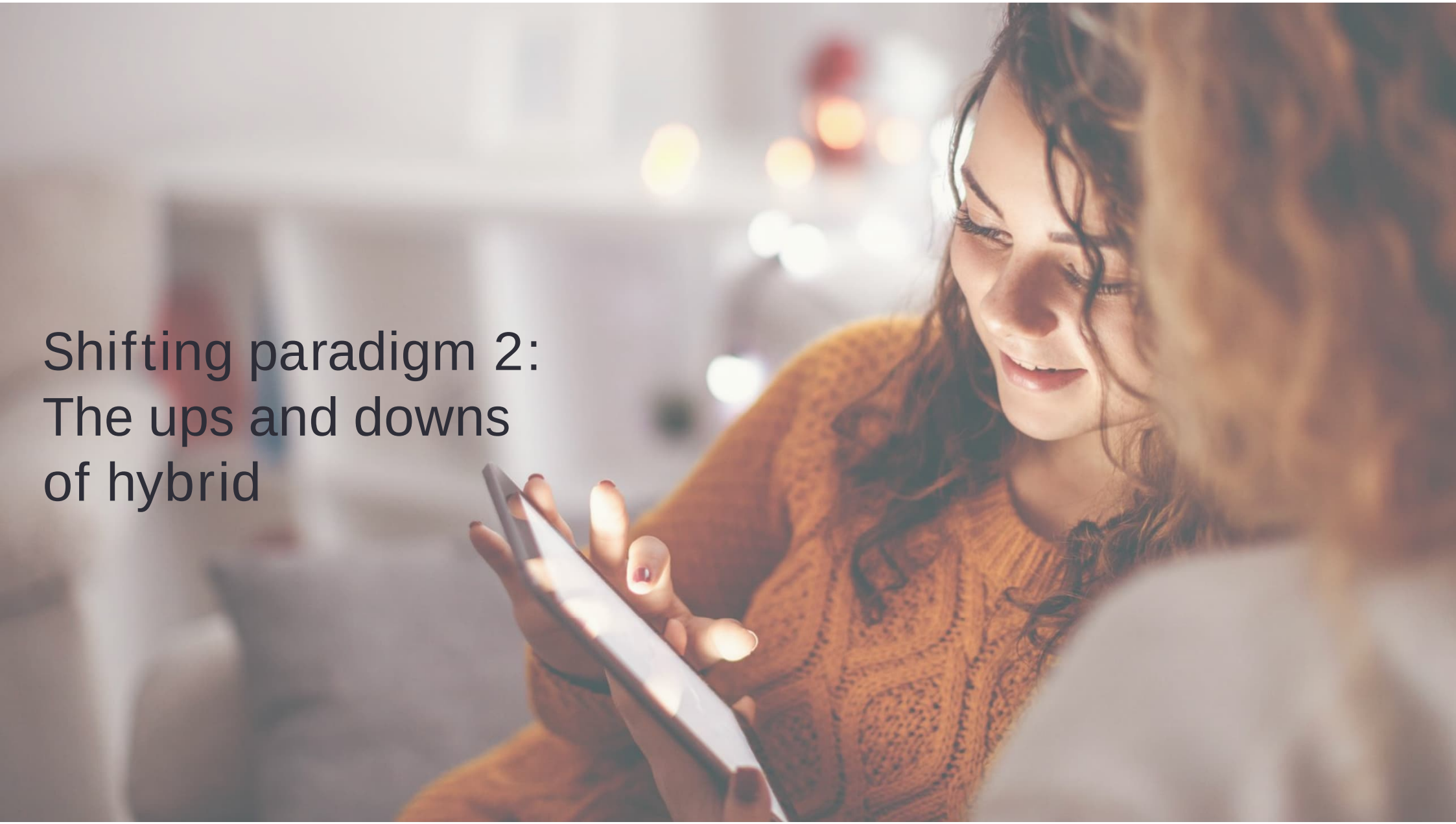
You tell us...



What demographic shifts are you seeing?



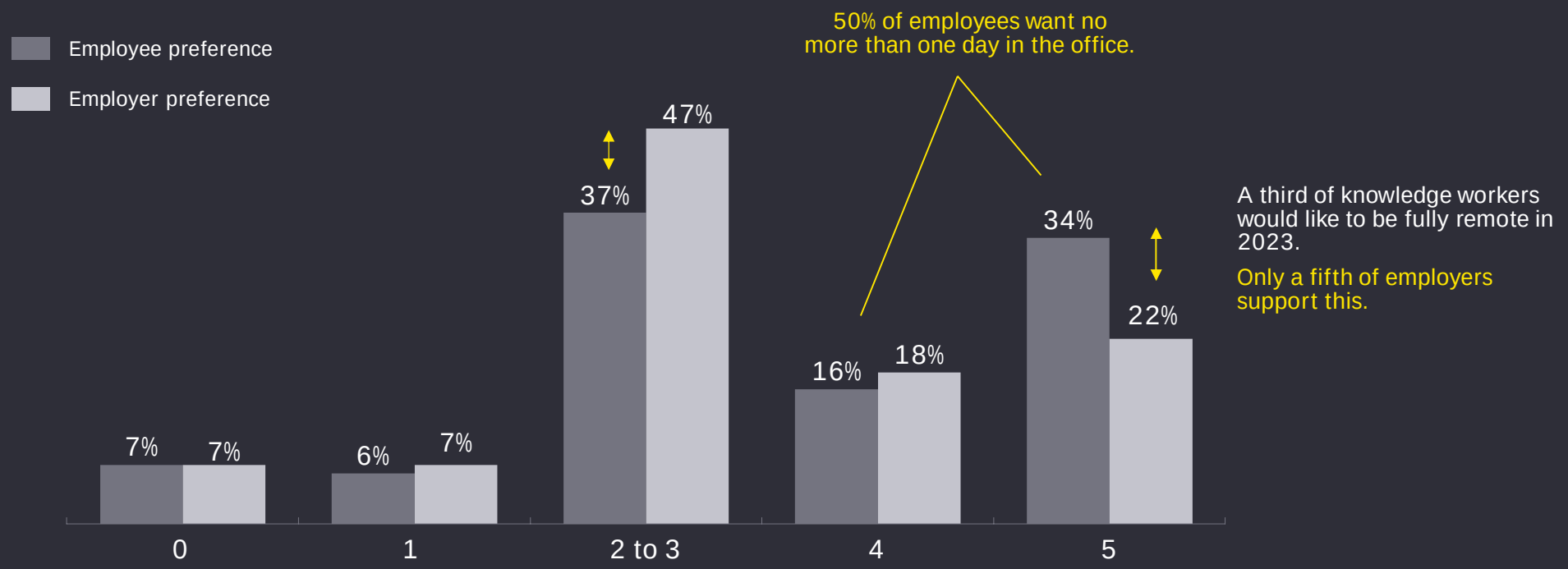
How are you managing this?


Shifting paradigm 2:
The ups and downs
of hybrid

The tension between employers and employees continues between hybrid and fully remote work models

Employers are much more likely to want employees to work two to three days remotely, whereas employees are more likely to want five days remote.

Preferred remote for knowledge workers in 2023



A third of knowledge workers would like to be fully remote in 2023.

Only a fifth of employers support this.

Source: EY Work Reimagined Survey 2023

Both ‘knowledge’ and ‘essential’ workers seek more flexibility in when, where and how they work. What drives worker preferences?

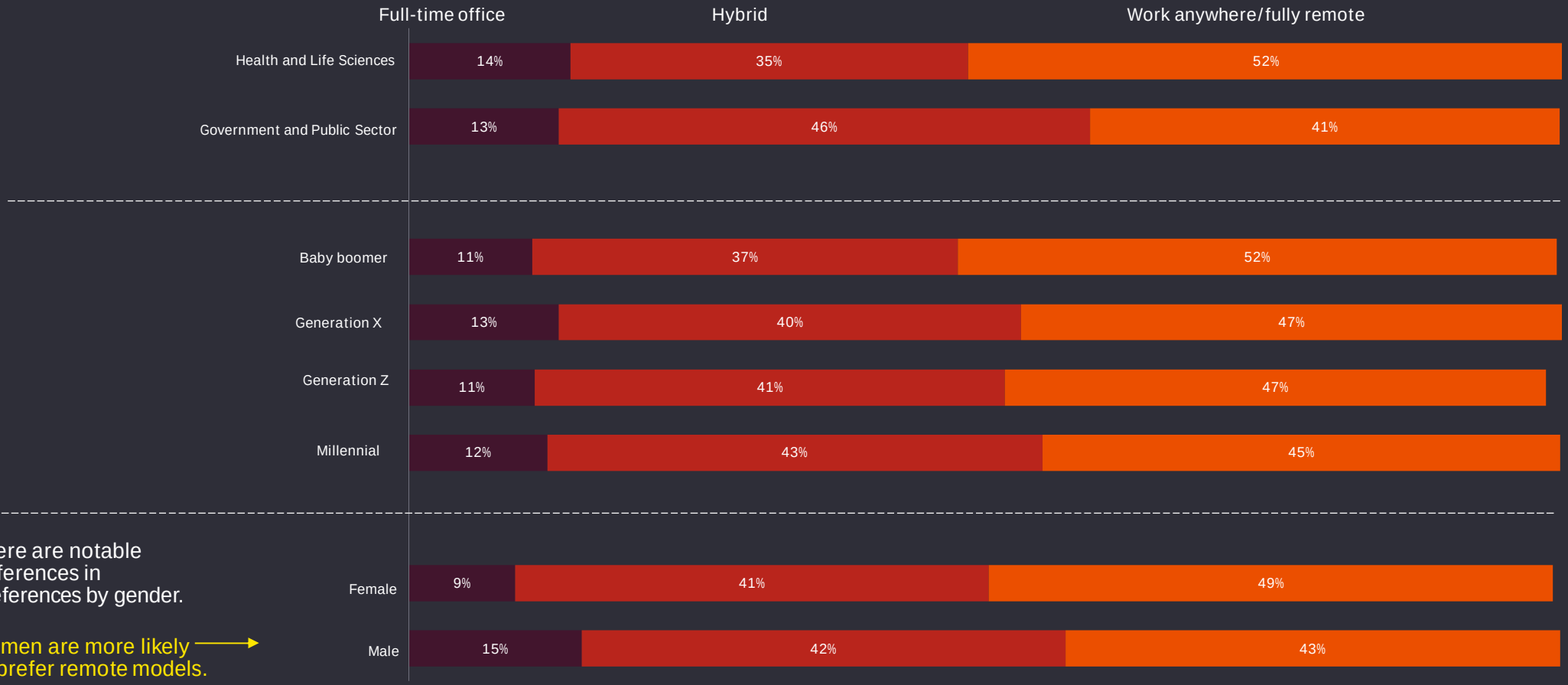
- Opportunity to work as a team
- Social connection
- Requirement of the role
- Productivity
- Quality of office space = social space thrives



Source: EY Work Reimagined Survey 2023

There is significant variance in hybrid working preferences across geographies, sectors, generations and genders

How would you describe your personal flexible work preference for 2023+? (employee response)



There are notable differences in preferences by gender.

Women are more likely to prefer remote models.

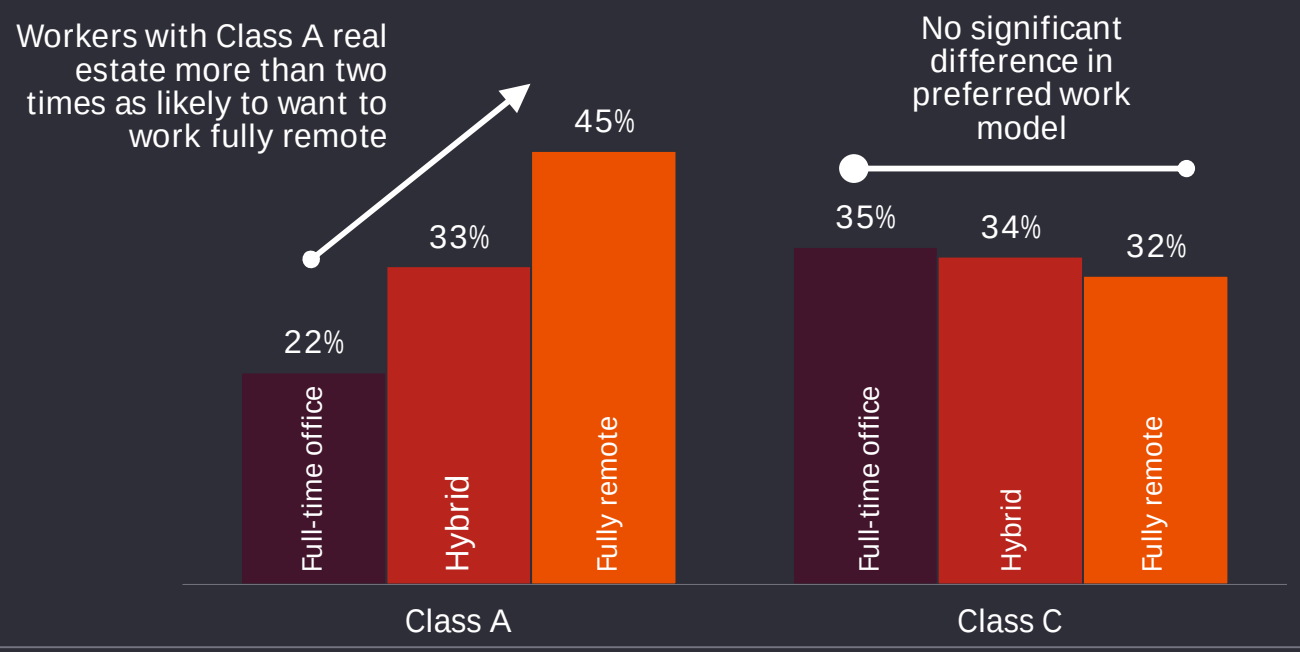
Figures may not sum up to 100% due to rounding

Source: EY Work Reimagined Survey 2023

Having Class A real estate doesn't mean workers are likely to come in more often

Counterintuitively, employees who report having Class A prime real estate for their workplace are more likely than those with Class C real estate to prefer remote working.

The importance of the quality of workplace real estate to preferred work models



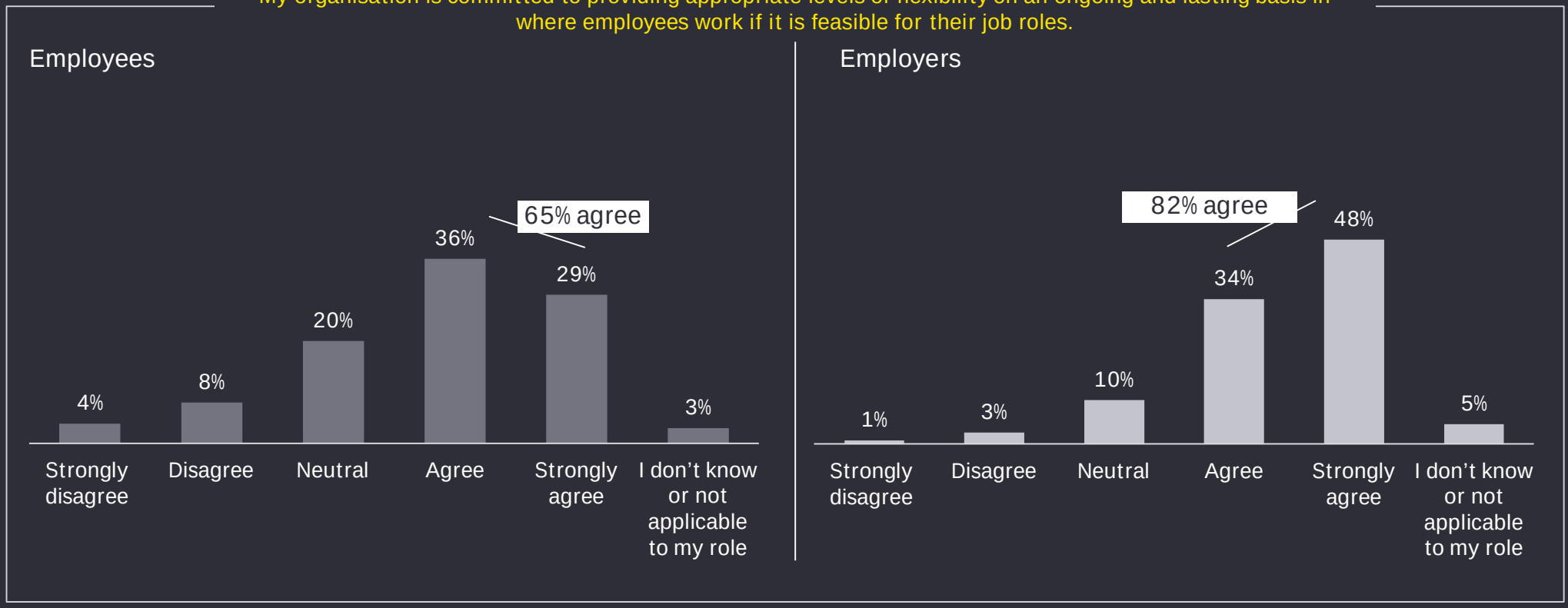
Class A real estate is typically the best quality and located centrally in cities, with the best amenities; Class C is typically less well located and with less functionality and amenities.
For full definitions, see speaker notes and Appendix

Source: EY Work Reimagined Survey 2023

Flexible working is here to stay and a majority of employees and employers believe their organisation is committed to providing appropriate levels of flexibility

But employers are more optimistic about this commitment, with 82% agreeing vs. 65% of employees who agree.

My organisation is committed to providing appropriate levels of flexibility on an ongoing and lasting basis in where employees work if it is feasible for their job roles.



Source: EY Work Reimagined Survey 2023

60%

Time spent on administrative activities by child and family workers

Source: EY analysis (US, UK and Australia data)

30%

Estimated social care sector roles that could be performed from home

Source: EY Work Reimagined Survey 2023 (Flexible working preferences) & Statistics Canada 2024

Gen Z is in the spotlight. What makes them special?

Demographic shifts

Digital natives

- Access to digital devices since birth or childhood
- Accustomed to instant gratification – online services, real-time information and radical transparency
- Social interactions digitally enabled

Pandemic impacts

- Rites of passage forfeited (graduations and milestone events) and social isolation
- Prioritization of health and wellbeing (physical and mental)
- Expectations of flexible and remote work

Climate emergency

- Climate historically seen as a 'next generation' problem to solve
- Routine exposure to catastrophic climate events – floods, fires and hurricanes

Geopolitics

- First time voters in a polarized political climate
- Political affiliations not just ideology, but identity
- Exposure to global events magnified through social media

Social equality

- Amplified focus on social justice, compounded by social media (*#MeToo and #BlackLivesMatter*)
- Social matters publicized: gun violence, marital and reproductive rights and religion
- A collective mindset: “we, not me” – no toxicty

Labor market

- Exposure to the job market in a period of mass mobility (e.g., war for talent, the Great Resignation and quiet quitting)
- Digital platforms enable access at scale to open requisitions, mass applications and professional networks

Nostalgia

- Limited work experiences or memories of 'the good old days' (pre-pandemic on-site work)
- Limited experiences with 'work friends,' in-person events and celebrations

Startup culture

- Aspirations to change the world and create the 'next big thing'
- Entrepreneurial culture revered, glorified in pop culture
- Resistance to the system and desire for self-employment and autonomy

Adolescent experiences will shape the way this population interacts with the world of work. Are you ready to interact?

Source: EY - Is Gen Z the spark we need to see the light? 2021 Gen Z Segmentation Study.

You tell us...



How are you managing the multi-generational workforce?

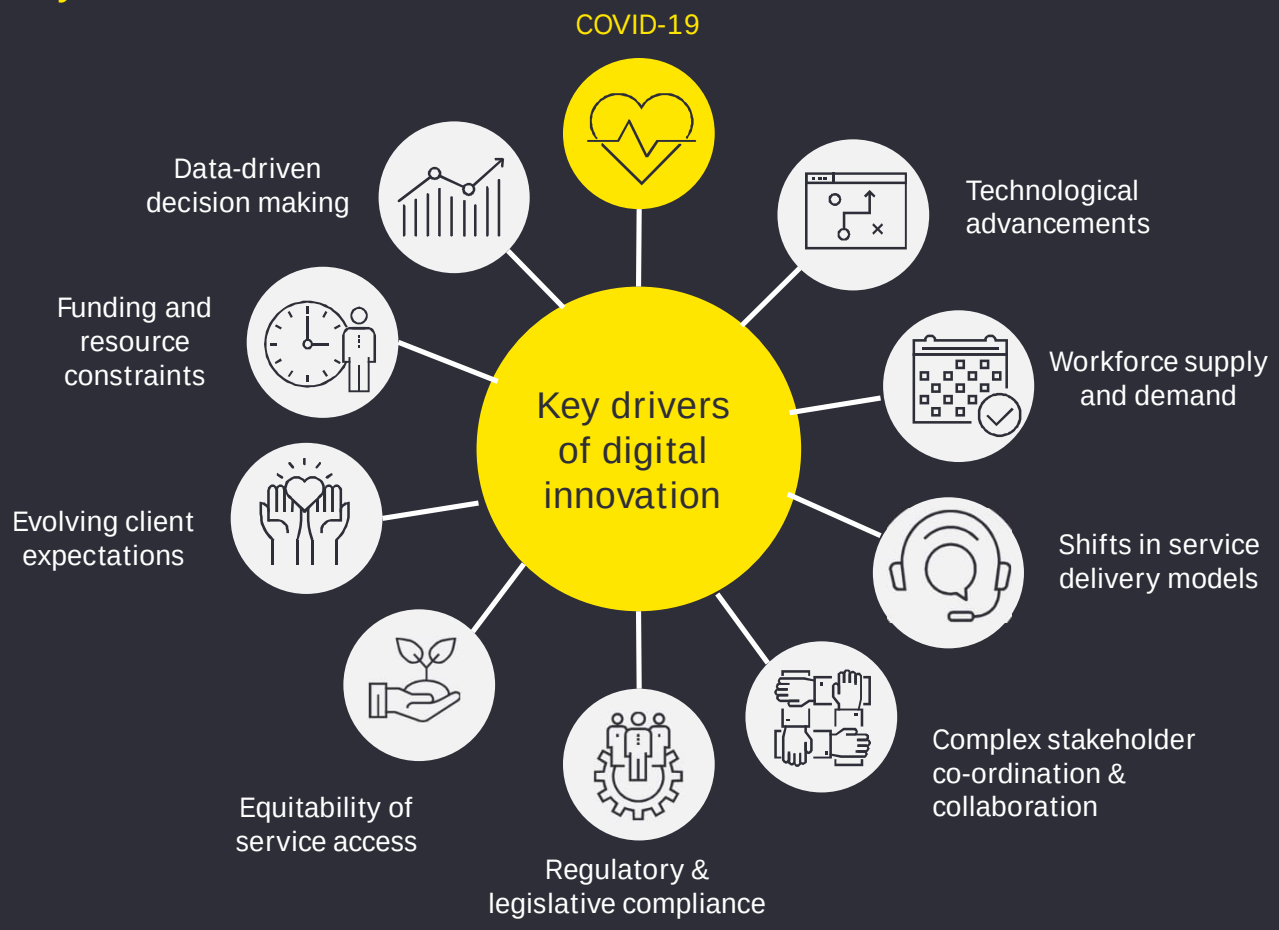


Given the desire for flexibility, how could you build this into your workforce?


Shifting paradigm 3:
Technology and
automation

A perfect storm: Now is the time to drive digital innovation in community services

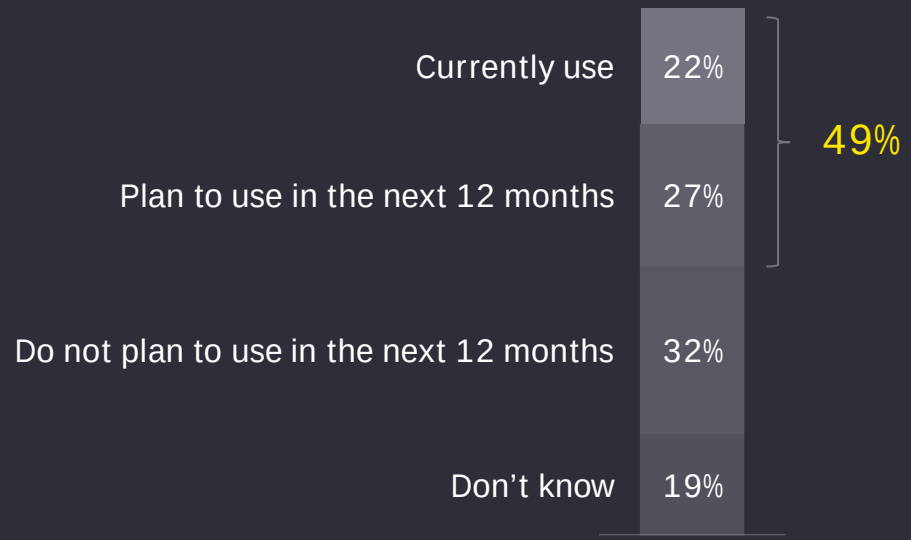
Key drivers



We now have a perfect opportunity to use post-COVID-19 momentum to drive innovative changes and explore how emerging technology and digital solutions can improve service delivery....

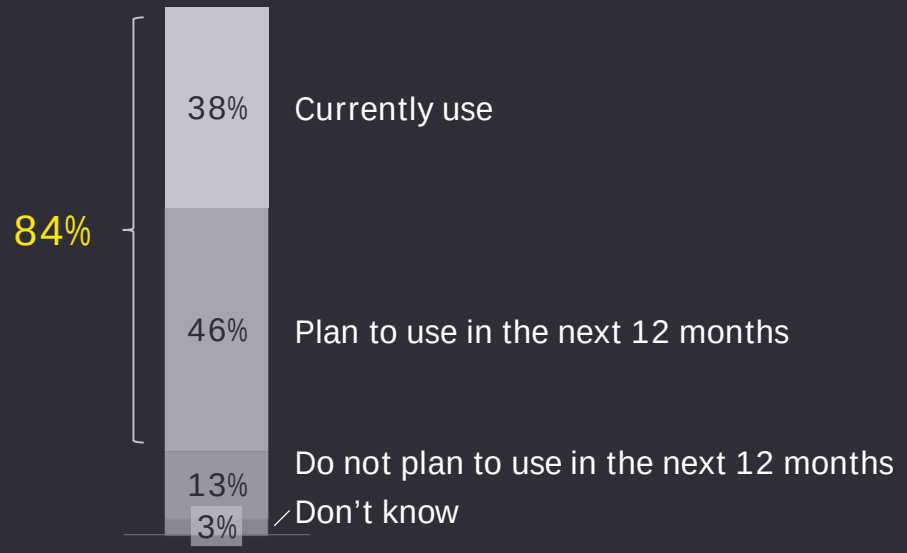
While only a minority currently use generative AI, there is an expectation for greatly increased use in the next 12 months….42% of Gen Z say they will leave a digitally immature employer

Employee use of generative AI at work



73% employees from Technology, Media and Telecommunications (TMT) vs. only 31% employees in Government and Public Sector currently or plan to use in next 12 months

Employer use of generative AI at work



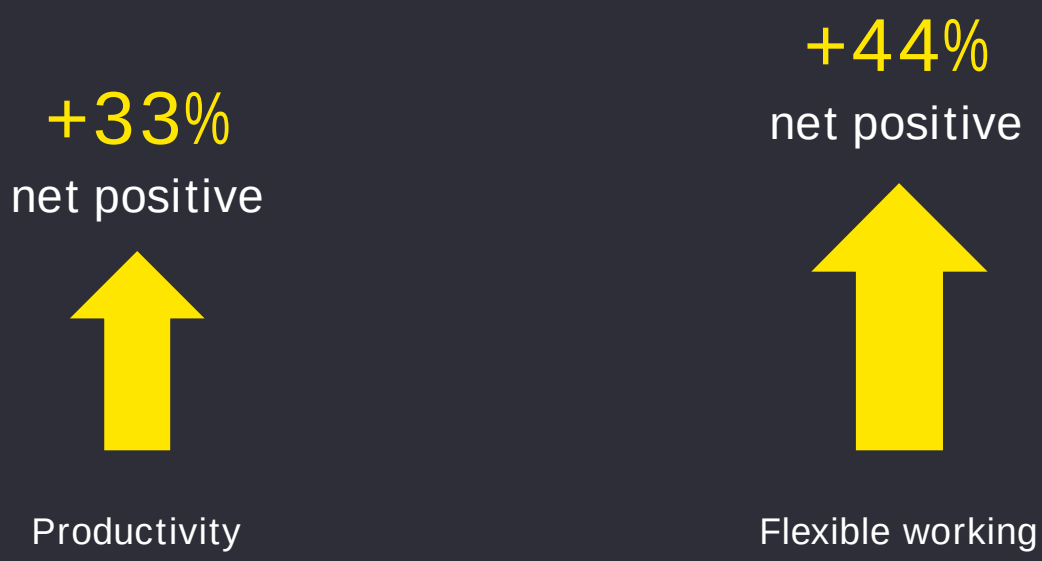
Source: EY Work Reimagined Survey 2023

There is broad optimism from employees and employers about the potential impact of generative AI

There is broad optimism about the potential of generative AI to enhance outcomes at work through:

1. Boosting productivity
2. Enabling greater flexibility

Employee and employer net positive ratings*



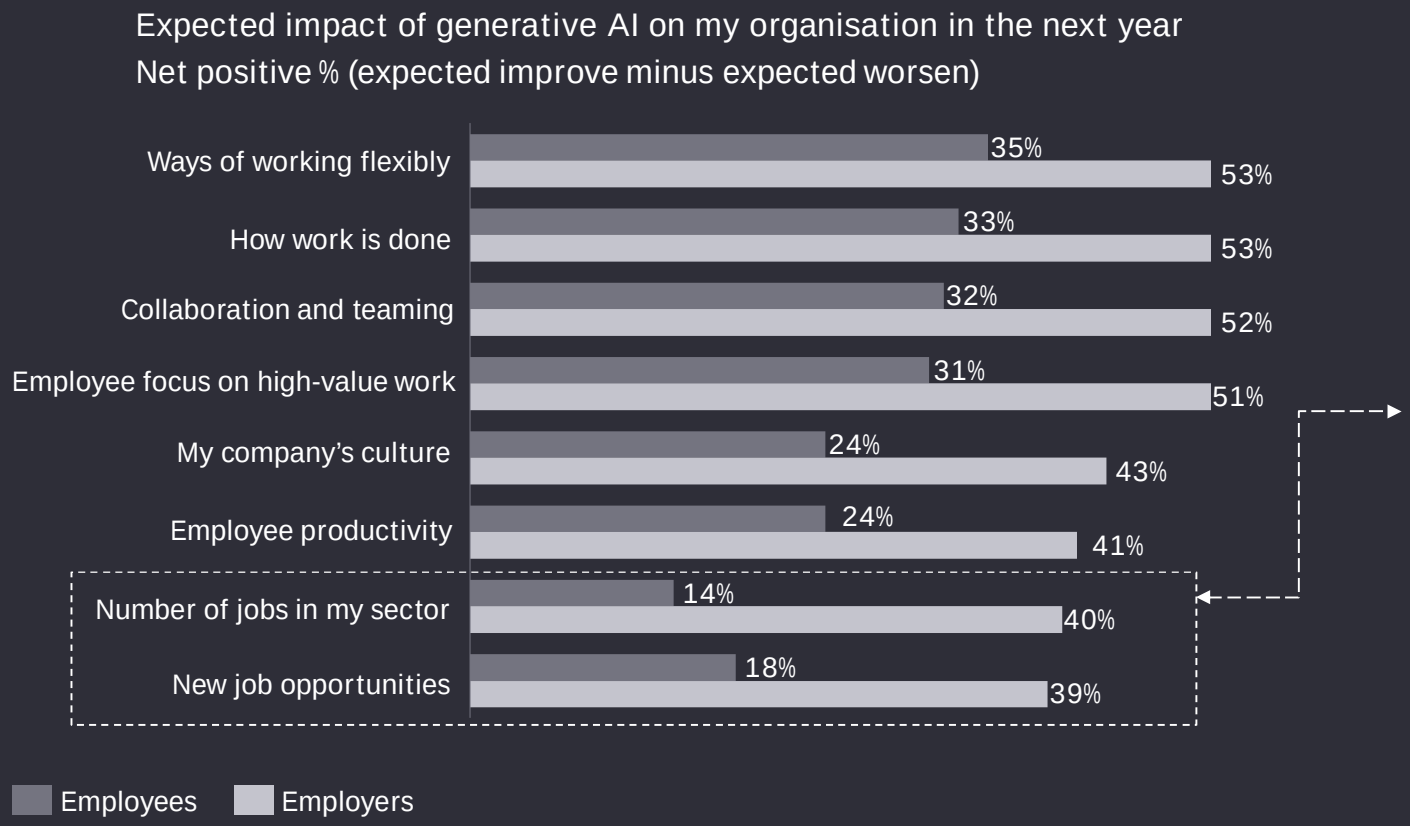
Gender differences in optimism

On average, male employees are more optimistic than female employees on generative AI's potential impact on flexible working (+41% net positive vs. +31% net positive).

* Net positive is the difference between responses for significantly/somewhat better and significantly/somewhat worse.

Source: EY Work Reimagined Survey 2023

There is broad optimism from employees and employers about the potential impact of generative AI (2 of 2)



Optimism on jobs means talent will remain a top focus.

Better productivity may help alleviate some structural labour market challenges related to talent shortages and skills gaps.

But, if this new technology also helps create new jobs, generative AI may not permanently solve for structural labour market issues on its own.

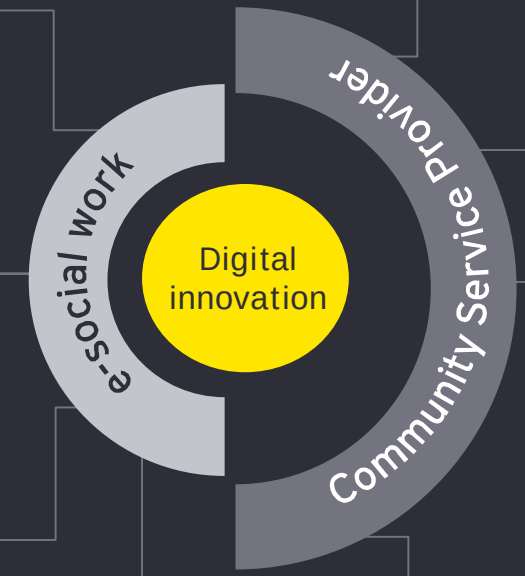
* Net positive is the difference between responses for significantly/somewhat better and significantly/somewhat worse.

Source: EY Work Reimagined Survey 2023

So are employees and employers underestimating the need to invest in generative AI training?

Neither employees nor employers are prioritising generative AI skills

Technology opportunity must be unlocked at the individual and organisational level



Connecting with clients

- Through mobile face time, video conferencing and other tools such as text messages

Case Management

- Predictive Analytics: support analysis of past case data and potential issues and take corrective action before they escalate.
- AI can provide case recommendations on how to address scenarios based on the learning and experience from previous case outcomes.

- Online scheduling and management tools supports social workers with appointments and client communication. This can also include automated communication such as reminders to assist both social workers and their clients.

Record keeping

- Using collaborative online tools like sharing notes on Google Docs supports rapid information sharing in a secure way.

Public and client enquiries

- Conversational AI-powered chat and voice bots can be used to handle basic customer inquiries and provide an immediate response to the public.

Intake , assessment and referral

- AI and predictive analytics can help Identify children who might be at risk and assess and manage potential risk to children.
- Natural language processing can be used to analyse customer inquiries and determine their intent to support rapid assessment and referral within the organisation.

Recruitment, onboarding and learning

- AI and predictive analytics can support the development of position descriptions.
- Trained algorithms can supported targeted candidate identification.

End to end corporate services processing

- Seamless and automated transactional processes across HR, Finance, Procurement and Payroll.
- Advanced analytics to enable real time management information, supporting governance and decision making

A future approach: End to End Generative AI

Four end-to-end AI solutions to support the efforts of front-line staff.



Smart Documentation Assistant



Administrative Assistant



Chatbot Assistant



Quality Assurance Assistant

Innovative opportunities present at various stages across the client and practitioner journey and are now a reality

Other innovative technologies and digital solutions

Client Journey

Service stages

1. Self Help

A child or family seeks information through a 'digital front door'.

Digital front door

- Chatbot to assist navigation
- Self-service resources online
- Links to services

Predictive analytics

- Automated case summaries, offering significant efficiencies for both the practitioner, but also upstream areas such as the DFFH Child Protection Litigation office.
- support analysis of past case data and potential issues

2. Early help

Family Services organisation's work with families to help prevent problems from getting worse, with interventions aimed at preventing involvement with Child Protection.

AI can provide case recommendations on how to address scenarios based on the learning and experience from previous case outcomes.

3. Immediate help

The department of Family Fairness and Housing's Child Protection function intervenes with families where there is a significant risk of harm to a child or young person.

Virtual / Augmented reality can facilitate training, education, and social worker / client interactions

4. Ongoing targeted and supported Services

Ongoing support to help families to raise happy, healthy children through training, education, behaviour change, and therapeutic support.

Benefits

Functions	Connecting with clients	Intake and assessment	Case Management	Interventions
Generative AI	Smart Dictation Assistant	Chat Bot Assistant	Quality Assurance Assistant	Administrative Assistant
E-Social Worker	Translates short-hand verbal dictation, case notes and audio recordings from interviews and visits into professional, detailed narratives Prompts staff for additional information when details are missing or sparse	Answers policy and procedural questions for users Answers questions and summarizes information related to case and client history Allows users to ask for service availability based on the needs of the client	Reviews structured and unstructured data on individual cases to generate QA results Provides real-time feedback to caseworks Allows for strategic mitigation of risk	Compiling forms by prefilling structured and unstructured information Compiles summary information from large documents and paper files Summarising narrative details for court reports
Client	Not needing to repeat their story and reduces need for follow up.	Receive the right types of services and the right time based on accurate information.	A higher high quality of care	More time spent connecting with practitioners and receiving targeted support

And capitalise on AI/GenAI in the community services workplace

- Design and optimise prompts for generative AI models
- Expertise in natural language processing and machine learning
- Creativity and understanding of human language and behaviour

Prompt engineering

- Identify and manage security risks with generative AI
- Expertise in cybersecurity and AI technologies
- Strong problem-solving skills

AI Security Specialist

- Create digital art using generative AI
- Expertise in art and design, machine learning, and programming

Generative Art Designer

- Develop solutions addressing social and environmental challenges
- Expertise in machine learning and understanding of social and environmental issues

AI Trainers for Social Good

- Create interactive experiences using generative AI
- Expertise in storytelling, game design, and AI programming

AI Storyteller/ Narrative Designer

- Ensure compliance with legal and regulatory requirements
- Expertise in legal and regulatory frameworks, and AI technologies

AI Compliance Officer

- Ensure responsible and ethical use of generative AI
- Knowledge of ethical implications, computer science, law, and public policy
- Work with developers, policymakers, and stakeholders

Ethical AI Expert

You tell us...



How will you use technology and AI?



How will this help you improve workforce and client experience?



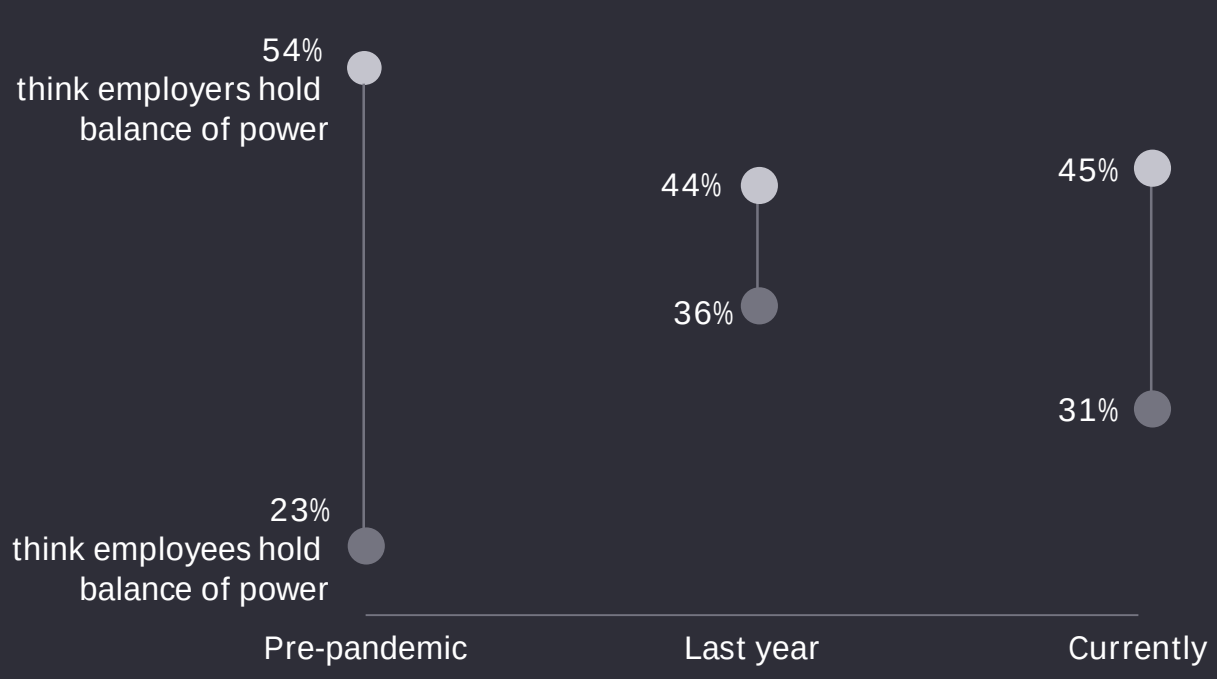
Shifting paradigm 4: Changing balance of power

The balance of power has shifted towards employees

Three years of disruption and uncertainty have created labour market dislocation and divisions in expectations and behaviours between employees and employers

Who holds the balance of power in the labour market?

% average of all respondents (employers and employees) who agree*



Shift in balance of power since the pandemic

-9 percentage points

+8 percentage points

** Numbers do not sum to 100, as results exclude "About equal" responses*

** The gap shows the average of employer and employee responses as to who holds the balance of power across the three time periods.*

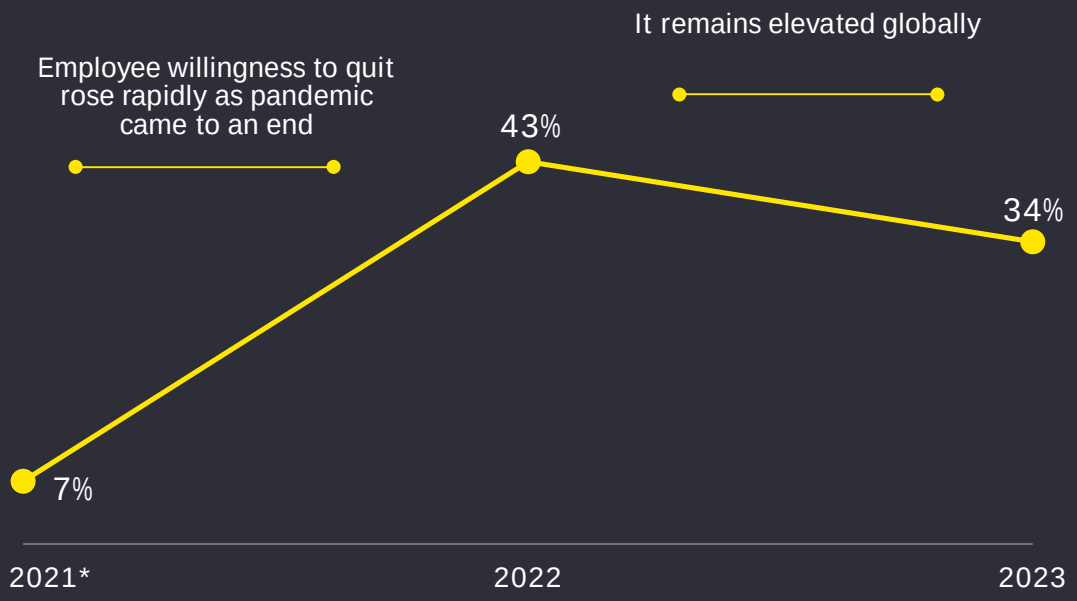
Source: EY Work Reimagined Survey 2023

Employers underestimate their employees' likelihood of departure

While slowing economic growth is reducing employee likelihood to quit, employers may be overestimating by how much

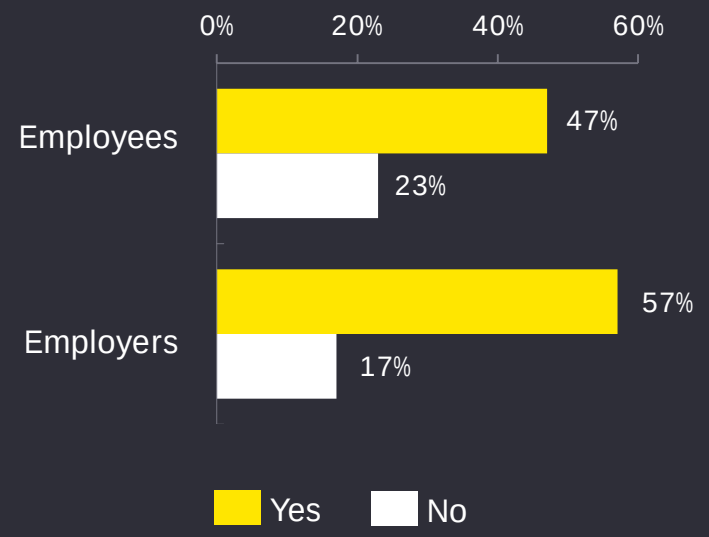
Employee willingness to quit

% who say they are likely to leave in the next 12 months



Is the downturn reducing employee likelihood to quit?

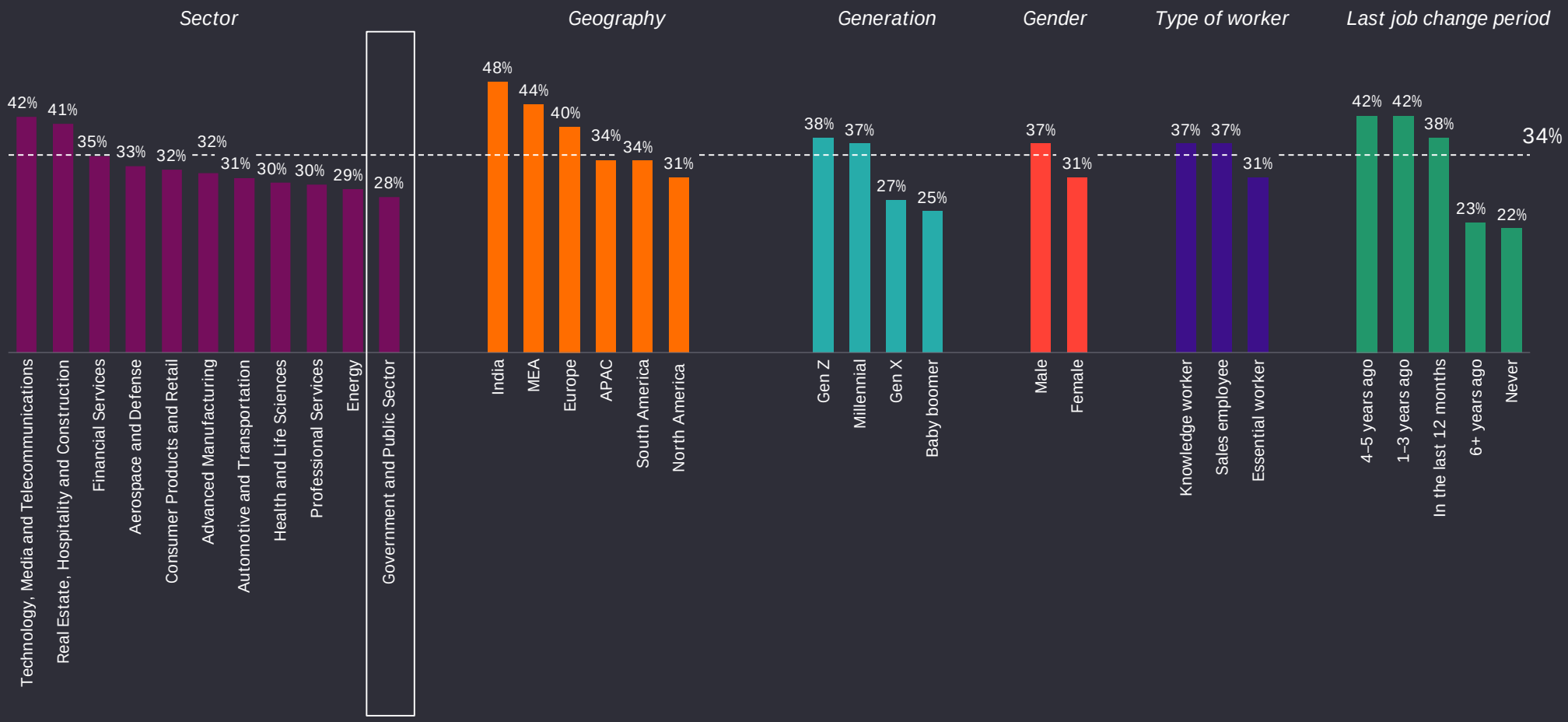
% who agree (yes) or disagree (no)



** In 2021, the 7% represents the proportion of employees who said they would be unlikely to stay.*

Source: EY Work Reimagined Survey 2023

Employee likelihood to quit varies significantly by geography, generation, gender and type of worker



Source: EY Work Reimagined Survey 2023

Workforce analysis in the UK suggests some factors will keep people longer



Employers more likely to stay when they

- are on a full-time contract
- are paid well
- receive on-the-job training
- they are in a well-run service
- their manager has more than 2 years' experience in the role
- they have been recruited internationally
- they are over 20 years old

Source: Skills for Care Workforce Intelligence – The State of the adult social care sector and workforce in England 2023

Pay remains the top concern for employees, with global inflationary pressures maintaining the pressure on real wages

1

Pay is the top concern for employees.

Top risks

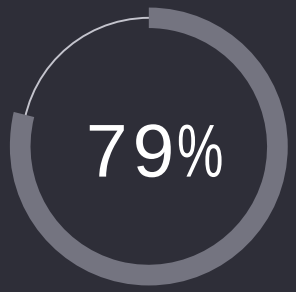
% employees and employers who selected as a top three risk



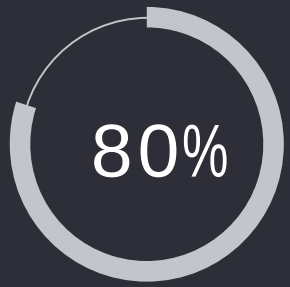
Most employees and employers think there should be "moderate to extensive" changes to total rewards.

% who want moderate or extensive change to rewards

(given the mix of talent and business pressures)



employees want moderate to extensive change in rewards



employers agree there should be moderate to extensive change

Source: EY Work Reimagined Survey 2023

Thinking differently to sustain and retain your workforce

Pay

Security

Flexibility

Mobility









Image: EY Indigenous Sector Practice

You tell us...



How are you connecting with underrepresented groups in the community and your workforce?



Shifting paradigm 5: Psychosocial safety

Better wellbeing programs and rewards are the most likely factors to attract workers to new jobs

Both employers and employees rank the better overall wellbeing programs (financial, physical, emotional, or social) offered as the primary reason that attracts employees' to a new job/career/employer



Source: EY Work Reimagined Survey 2023

What are psychosocial hazards, and why should organisations care?

What are psychosocial hazards?

- Psychosocial hazards are anything that can create psychological harm. For example, job demands, poor support, violence and aggression, bullying, or remote or isolated work[8]
- Psychosocial hazards can create stress, which can cause psychological and physical harm. Stress, if prolonged and/or severe can cause both psychological and physical injury. Workers are likely to be exposed to a combination of psychosocial hazards; some may always be present, while others only occasionally

Why should organisations care?

- Psychosocial hazards are governed by relevant workplace health and safety obligations like any other health and safety hazards
- Workplace health and safety laws require organisations to manage hazards, including work-related psychosocial hazards, so far as is reasonably practicable



What happens if you ignore psychosocial hazards?

Unmanaged workplace psychosocial hazards are the precursor for significant levels of psychosocial hazards within any business.

Therefore, if these psychosocial hazards are left unmanaged, a business' psychosocial hazards profile will be negatively impacted.

Common Psychosocial Hazards


Violence and aggression


Bullying and harassment


Poor work environment


Lack of recognition or support


High job demands


Low job control


Poor role clarity


Traumatising events/materials


Isolation


Workplace conflict

Making your organisation ‘sticky’ – psychological safety and belonging

Belonging is the key to unlocking the business benefits of diversity and inclusiveness. A strong sense of belonging can lead to better collaboration, retention, and business performance. When people feel like they belong, they are more likely to be engaged. Belonging reduces stress levels, improves physical health, emotional wellbeing and performance, and helps build a psychologically safe environment.

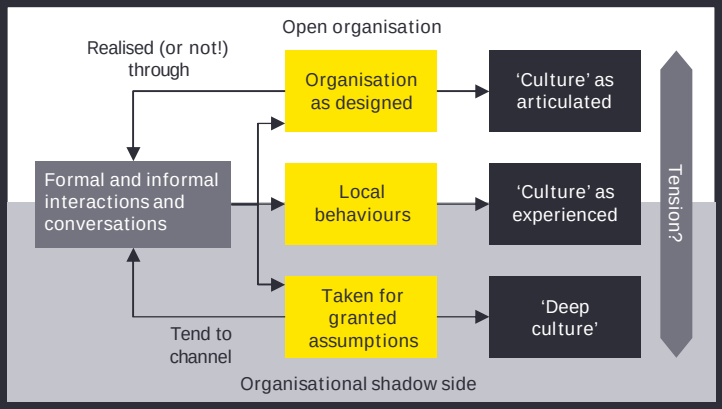


Enabling productivity through psychological safety and positive workplace culture

Culture is the "HOW" of your company – how you get things done, how people work together, how value is created, how people are motivated, how people talk and make decisions. EY research has found that organisations who put their people at the centre of their transformations are 2.6 times more likely to be successful.

Culture is complex and goes beyond what is communicated on the company website. Research suggests that culture has multiple levels. Therefore, any attempt to measure or change culture requires understanding the:

- Culture as articulated – How the culture is communicated, typically by senior leaders or informal documents
- Culture as experienced – How the culture is experienced day-to-day
- Deep culture – The taken-for-granted, unquestioned, less conscious factors underpinning the experienced culture



Culture can help you build a psychologically safe environment by helping employees feel more connected and inspired at work, through enhanced well-being and resilience, promoting diversity, inclusion and belonging and improving employee engagement. This culminates into higher retention.

Culture matters



of employees who believe the company culture has become better are *unlikely* to leave their employer in the next 12 months.



of employers who believe the company culture has become better say that their employees feel connected and inspired at work.

Source: EY Work Reimagined Survey 2023

Engagement and retention through a people-centred approach to leadership

To Inspire

(Purposeful vision)

- Disrupt: look elsewhere to have your thinking challenged
- Build belief: clearly communicate to people "why" change is needed

To Care

(Psychosocial safety)

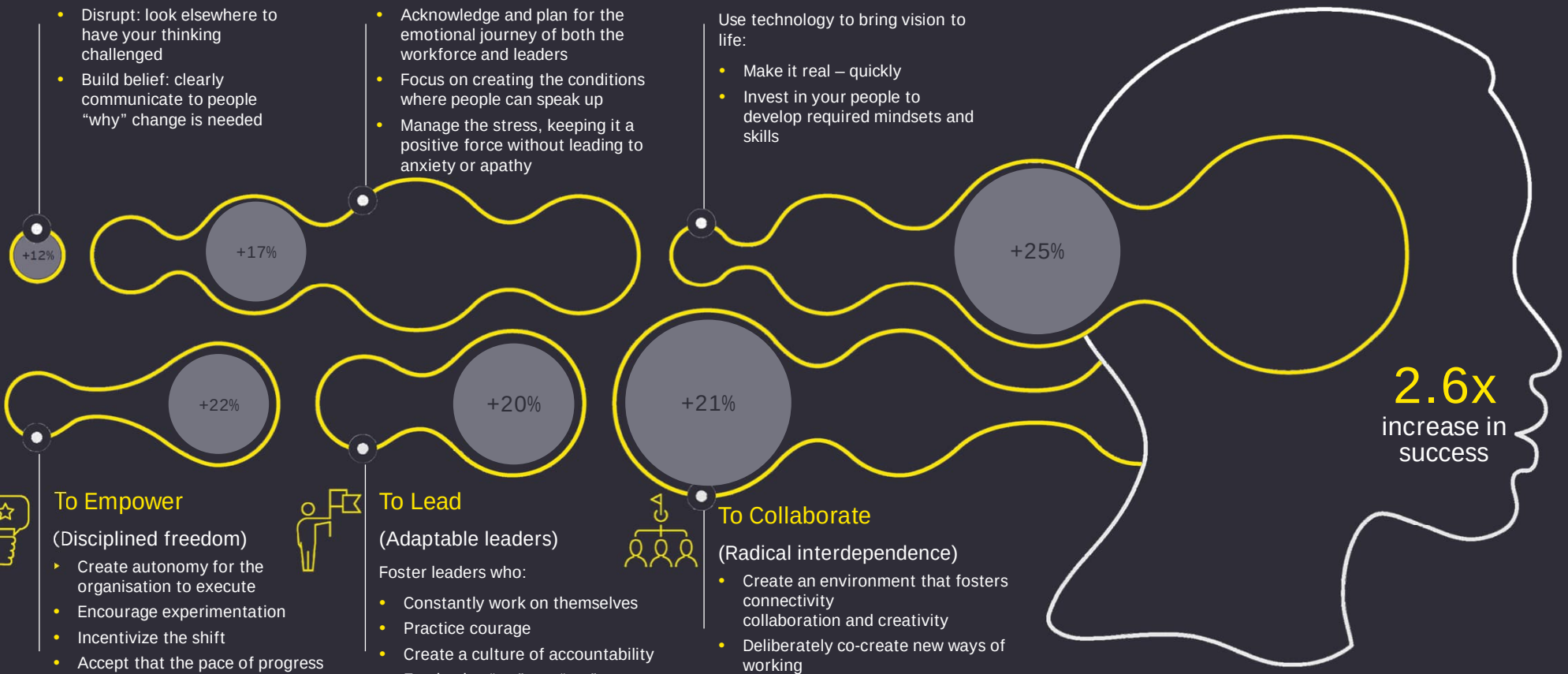
- Acknowledge and plan for the emotional journey of both the workforce and leaders
- Focus on creating the conditions where people can speak up
- Manage the stress, keeping it a positive force without leading to anxiety or apathy

To Build

(Purposeful tech)

Use technology to bring vision to life:

- Make it real – quickly
- Invest in your people to develop required mindsets and skills



To Empower

(Disciplined freedom)

- Create autonomy for the organisation to execute
- Encourage experimentation
- Incentivize the shift
- Accept that the pace of progress will ebb and flow

To Lead

(Adaptable leaders)

Foster leaders who:

- Constantly work on themselves
- Practice courage
- Create a culture of accountability
- Emphasise "we" not "me"

To Collaborate

(Radical interdependence)

- Create an environment that fosters connectivity collaboration and creativity
- Deliberately co-create new ways of working

You tell us...



What are you doing to create a psychologically safe and inclusive environment?


Call to action and next steps
The better the question. The better the answer.
The better the world works.

Our research highlights five emerging themes to tackle child and family workforce challenges



A new construct for community services: Productivity for workforce and client outcomes

$$Productivity = Output \,/\, Effort$$

∴ OUTDATED WAY OF CONSIDERING HUMAN PRODUCTIVITY

WE NEED A NEW EQUATION

$$Productivity' = Human\ Value\ x\ Technology$$

∴ UNLEASHING OF HUMAN POTENIAL

∴ ENHANCED EMPLOYEE WELLBEING

∴ LONG TERM VALUE CREATION

Unlocking human value and technology productivity

- This will require us to ask:
  - What uniquely human contribution will improve our service or client experience?
  - How do we redesign the work to make it more productive?
  - What do our people need to operate at their potential and grow?

- How can we empower human value creation?
  - Giving them individual choice over where, when and how that work is done
  - Putting the productivity burden on technology
  - Rewarding people for value creation

Collaboration rather than competition across the social care eco-system is most likely to yield best results….



How do we work together to:

- Attract people into our workforce, and encourage them to stay in our workforce?
- Innovate for future workforce/ workplace/ worksmart solutions?

The time to work together is NOW

Q&A

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