

THE DETAILED REVIEW

The main fieldwork programme takes place in Phase 2 and it provides a more detailed examination of specific areas and issues. Again, a range of methods is used (such as case studies, interviews and meetings, value for money exercises). Some of these methods are standard and others are adapted so that chosen areas can be explored in depth. This phase ends when the joint review team presents the initial headline findings to the local authority.

Milestones:

- Fieldwork planning (Weeks 13-15)
- Introductory meetings (Week 16)
- Fieldwork - service users/carers and service providers (Week 18)
- Fieldwork - assessment/care management teams (Week 20)
- Fieldwork - management and partners (Week 22)
- Final assessment (Week 24)
- Feedback meetings (Week 26)

Fieldwork Planning

Once the interim analysis and risk assessment has been completed, the lead reviewer will start planning the programme for the detailed review fieldwork with the local authority and the link officer. This will involve sharing some of the key messages that have emerged in the broad review phase and the ways in which this will influence the fieldwork in the detailed review phase. The joint review team and the local authority will want to use this as a further opportunity for dialogue and for ensuring that the review process is delivered in a spirit of partnership, with no surprises.

In the broad review phase, the emphasis is on using methods that are uniform, ready made and comprehensive in scale. Numbers of them are designed to allow comparisons to be made between local authorities on the basis of quantitative evidence. In the fieldwork for the detailed review phase, some of these aspects continue but there is also more weighting given to ways of working that are:

- bespoke for each review;
- responsive to the interim assessment and considerations of risk;
- focused on specific areas and themes.

The document in the Handbook that describes fieldwork planning for the detailed review phase (Section 2.2) deals with these issues in more depth. It also outlines the ways in which the local authority and the joint review team will work together to ensure that all those taking part have a good understanding of the part they are asked to play in the fieldwork.

Introductory meetings for the detailed review

Members of the joint review team will spend one day in the local authority to:

- introduce themselves;
- provide briefings about the review process and answer any questions;
- give some feedback about the interim assessment;
- discuss plans for the detailed review fieldwork.

The meetings are meant to be introductory. Many of the participants will have opportunities during the next phase of the process to engage in more extensive dialogue with the joint review team.

The programme for these meetings will be tailored to meet the needs of the specific authority. It is usual for meetings to take place with:

- the Chief Executive and leading members (executive and scrutiny);
- social services staff¹;
- key stakeholders.

Fieldwork

The fieldwork is carried out in three one-week blocks, with a week between each block to allow for reflection, analysis and programme refinements. In each week, the programme concentrates on particular groups:

- Service users/carers, advocates and service providers;
- Assessment/care management teams;
- Leadership, management and partners.

This sequence is important, enabling the joint review team to observe the outcomes and impact of decisions about resource allocation, policy and procedures before seeing those responsible for these matters.

The fieldwork will comprise some common elements, whatever the choice of focus. These will include:

¹ Reviewers welcome a cross-section of staff attending these meetings to ensure that there is good communication about the purpose and format of the review.

- following through cases, by means of interviews with service users and their carers, staff directly involved, referrers and service providers as appropriate;
- vertical (or diagonal) slices, to follow particular issues through the organisation;
- a programme of interviews and meetings with service user groups, elected members, staff, managers, service providers, partner organisations and those offering an advocacy service;
- visits to office bases and other service settings as appropriate.

All those who are involved in the fieldwork programme should receive the relevant information about joint reviews (e.g. leaflets, guides, briefing notes, etc.) well in advance. They may wish to access other documents in the Handbook.

Final assessment

Each joint review should provide clear, well-evidenced and well-considered judgements about performance that can be understood and acted upon by a wide range of stakeholders, locally and nationally.

All these stakeholders have proper expectations that the final judgements are consistent, based upon rigorous analysis of evidence, robustly tested and demonstrated conclusively in the report made to the local authority.

Once all the evidence has been gathered and assessed, there follows a rigorous process of challenge both within the joint review team and by experienced moderators before the conclusions are shared with the local authority. This is intended to ensure that any judgements:

- draw on the whole range of qualitative and quantitative evidence;
- derive from correct application of the joint review methodology;
- are rigorously tested against known criteria;
- are deliberate, fair, consistent, informed and free from bias.

The final assessment meeting is a crucial element in the process of analysis and quality assurance. Immediately following the fieldwork, the joint review team continues to examine the evidence. They then meet with the external moderator to evaluate the local authority's performance in each of the two dimensions contained in the judgement matrix and in all the associated review domains. The basis for these judgements is explained in Section 0.6 of the Handbook.

The discussions will draw on all the evidence from the review process. The meeting will also agree the headline findings to be presented to the local authority in advance of the report. It is not possible to provide definitive

judgements at this stage because judgement decisions are re-assessed after the report is written.

Feedback meetings

The reviewers will return to the local authority and present the headline findings in meetings with:

- senior managers in social services;
- leading members and the Chief Executive;
- the service user and carer reference group;
- social services staff.

They will outline strengths and areas for improvement in each of the review domains. This feedback is not meant to provide definitive conclusions and the material is not intended for publication.