

Fieldwork visits - Guidance for the local authority

Week 1: Service users, carers, advocates and service providers

1. Meetings

The joint review team will wish to consult with a range of users and carers. They will be guided by the local authority, the county voluntary council and relevant national voluntary organisations about appropriate groups locally and about arrangements for setting up particular meetings. Clearly it is important to consult with the breadth of service users and carers but also to identify local priorities or services that have been subject to a recent reconfiguration.

As an outline guide, it may be helpful to include:

- Looked after children (including care leavers)
- Children in need (including young carers)
- Mental health service users
- Older people
- Learning disability service users
- People with a physical disability and sensory impairment
- Parents of disabled children.

A full range of service users should be invited. For example, a group of older people would need to have representatives who use day care domiciliary care, short breaks, etc.

It is helpful if the local authority could provide a list of people it expects to attend each meeting. The meetings should be kept to a reasonable size. Eight to twelve is helpful if only one reviewer is available but it is possible to cater for larger groups with advance notice. Advocates and helpers should be arranged as necessary. The local authority will want to make sure that service users and carers are comfortable and in a position to make their views known.

There is a briefing note for service users and carers to provide them with more information about the meetings.

2. Case studies

From the cases in the file-reading sample, the reviewers will select a number of service users and carers whom they wish to see in person (subject to their informed consent). The selection should be designed to obtain a balanced view. The local authority takes responsibility for arranging interviews between service users and reviewers, once the case study sample has been agreed. The joint review team can provide a sample letter to service users for use by the authority. There is a briefing note for service users and carers to provide them with more information about the visits.

The reviewers expect to visit and follow up about twelve service users but will identify fifteen cases, to allow for a certain amount of drop out. Staff should be asked to say whether there are any special factors that would make contact unhelpful or difficult. Reviewers will use their judgement in deciding whether to go ahead with interviews, with a presumption in favour of giving choice to the service user.

All interviews are confidential in the sense that people's names are not used in reports and they will not be quoted in a way that can identify them.

The lead reviewer will provide the local authority with a list of other people involved in the selected cases who are to be interviewed (in addition to the case manager and their line manager). This may include referrers and service providers. Usual practice is to ask the relevant case manager or key worker to make arrangements for the meeting.

The reviewers may be accompanied by the lay assessor. They are happy to make home visits to service users and carers, in the evening if necessary. It would be helpful to schedule 45 minutes for each service user and to ensure adequate interpreting/advocacy/personal assistance is available for the service user to make their contribution as effective as possible. They may choose to be accompanied by a friend or relative. There is a shared responsibility in respect of any health and safety issues that may arise.

In addition, some service users and carers may be interviewed by telephone.

The code of conduct for joint reviews (Section 0.2 in the Handbook) describes how reviewers are expected to work with vulnerable people.

3. Observation visits to service settings

The joint review team will visit a selection of services both operated directly and purchased by the local authority, across all client groups. There should be scope to plan themed days of visits, on the basis of specific service user groups or particular types of service across a range of service user groups or in response to issues identified in the interim assessment.

When visiting service settings, a programme for the visit is often helpful. This might comprise:

- a short meeting with the manager and a tour of the premises *15 minutes*
- a look at processes *30 minutes*
- a meeting with staff (not including the manager) *30 minutes*
- a meeting with the manager *30 minutes*
- meetings with service users *30 minutes*.

Each service setting may wish to provide in advance some background information (such as an outline of the work they do, staffing structure, budget, etc.), a SWOT

analysis, operational plans and recent inspection reports. The briefing note for service providers explains this request in more detail.

Service users should be informed about the nature and purpose of the visit in advance. They should have access to copies of the general leaflet about joint reviews.

4. Other meetings

In addition, the reviewers will wish to meet with groups of:

- representative foster carers;
- representatives of independent providers of services;
- representatives of voluntary sector providers of services;
- representatives of local advocacy services.