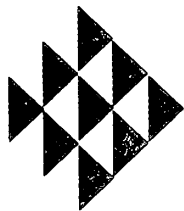


King's Fund



Carers Impact: Taking Stock & Taking Action

A short intensive programme to
accelerate improvements in practical
support for carers.

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Taking Stock and Taking Action

New Challenge and Opportunities

The idea for this planning programme arose out of consultation with chief officers from social services departments, health trusts and health authorities. Many have invested time and resources into Carers issues but felt they needed some feedback on their progress and direction. Others were aware that their authorities were only just beginning to work in this area and needed an event to kick start the process. This programme is designed to respond to that need and offer a new opportunity to look at carers' services afresh.

The community care agenda over the last few years has been substantial. There have been major changes in the delivery and purchasing of services, and an increased focus on the quality of services and outcomes for users and carers. This new audit and action planning programme has been designed to assist statutory authorities who wish to use the opportunity to:

- take stock of their current direction in developing support for carers;
- ensure that the needs of carers from all communities are being addressed;
- review local implementation of the Carers Act;
- review (or develop) cross agency strategies;
- develop multi-agency action plans;
- make better and more imaginative use of existing resources;

Critical Success Factors

If action planning is to have an impact, the experience of the first Carers Impact Project (1992-95) suggests the following factors are essential to achieving change:

- the involvement of local carers throughout the process, including the monitoring of action plans;
- participation of all key stakeholders from different agencies (voluntary and statutory) and with differing roles, including carers and elected members;
- leadership and the ongoing involvement and commitment of senior managers.

What Does Carers Impact Offer?

- **A programme designed to meet local needs**

Carers Impact will work with the local planning group to design a programme to meet local needs.

- **Opportunities to share the experiences of other sites**

The 'taking stock and taking action' work will complement the longer term demonstration projects so that lessons from this approach can be usefully shared with the 'bottom up' approach of the longer term projects.

Carers Impact will provide the opportunity for all the action planning sites to share issues and to hear about other country wide developments and initiatives.

- **Expertise in managing change and developing support to carers**

Carers Impact staff will bring in a co-worker/development consultant with expertise matched to the needs of the site. These people are experienced in managing change and developing support to carers.

- **Facilitation of workshops**

Two Carers Impact development consultants will facilitate the two day workshop which is a key element of the programme.

The Process

There are two core elements to the programme:

- 1 Setting up a local planning group to plan the event and monitor the work.
- 2 A two day workshop to take stock and develop action plans.

Stages of the Work

1 Preparatory work with senior managers from health and social services

- Explore the needs of the area and how the Carers Impact programme can be used.
- Establish the role and membership of the local planning group (*see page 5*).
- Agree a contract between Carers Impact and the local planning group specifying the work programme, timescale and costs.

2 Information Gathering and Exchange

In preparation for planning the workshop, the Carers Impact team will need local policies, plans and guidance, for example:

- Policies and committee reports on carers issues
- Community Care Plans
- Community Care Charter
- Health Authority Purchasing Plan
- Consultation strategy
- Information strategy for carers
- Guidance on Care practice - Assessment and Care Management
- Information on carer support services
- Information from voluntary organisations on services and needs of carers
- Information on unmet needs

Pulling together this information acts as the first stage in taking stock and should help to focus the planning of the content for the workshop.

3 Planning the Workshop

This stage involves two half-day visits by the two development consultants to work with the local project group on the detailed planning of the workshop (*see Appendix 1 for planning group terms of reference*).

4 The Workshop *(see appendix II page 8)*

Day 1 - Taking Stock

Day 2 - Taking Action

5 Monitoring Progress

Before the review day (which will take place six to nine months after the workshop) the following action will take place:

- Carers Impact will provide feedback on the workshop to senior managers from health and social services
- The local planning group will identify who and how the action plans will be monitored
- Carers Impact may be able to offer additional help to local projects; for example briefing papers on specific topics, contact with other projects or assistance in developing the final strategy

6 Review Day

This day will reconvene the original workshop participants (or meet with the local project group) in order to:

- to review the progress in implementing the action plans
- to identify and clarify complex issues arising from the action plans
- to review how carers have been kept informed and involved
- to identify how the work will be monitored in the future
- to obtain feedback on the Carers Impact process and contribution

Costs

- Authorities are asked to contribute £2,500 towards the cost of the full programme. This contribution may be shared between health and social services

Practical Arrangements

- Sites will be asked to arrange the local venues for all the planning meetings **and** the two-day workshop
- Sites will also be asked to meet any travel and alternative care costs for carers who take part in the programme

Local Planning Group Terms of Reference

Purpose of the Group

To act as a steering group for the 'taking stock and taking action' programme which aims to accelerate improvements in practical support to carers.

Tasks of the Group

- to lead the programme, ensuring all key stakeholders are fully involved
- to work with Carers Impact in planning the workshop, identifying participants and agreeing the workshop programme
- to establish or confirm the implementation and monitoring arrangements for the action planned
- to feedback the work and progress to all the agencies and stakeholders involved, using local networks and publicity as required
- to ensure the work links into the planning and budgetary processes of the agencies involved
- to ensure that carers are briefed and that arrangements are in place to provide support to carers in order that they may attend

Membership of the Group

- This will be a multi-agency (statutory and voluntary) group with participants from the key local agencies. These will usually include: Social Services (senior manager/lead officer on carers issues), Health Authority (senior manager/lead officer on carers issues), NHS Trusts, GPs/primary health care, voluntary sector groups, carer organisations, minority community groups, housing.
- Carers will also participate in the group. Carers from all sectors of the community should be involved. It may be useful to also consider 'partnering' each member of the project group from the agencies with a carer who can act as a mentor outside of the meetings.
- It is very important to ensure continuity of the core membership.

Working with Carers Impact

- Carers Impact will facilitate the planning groups, providing agendas and notes of the meetings
- Carers Impact staff will work with the local project group to design the full programme, plan the workshop and support the group in monitoring progress.
- Carers Impact staff will facilitate the workshop, provide feedback on the workshop to senior managers and share information and experiences from other sites and initiatives.
- A contract will be agreed between senior managers from health and social services and Carers Impact specifying responsibilities, timescales and key milestones and with a contribution of £2,500 from the authorities towards the overall costs.

Appendix II

The Workshop

Introduction

The core of the work will revolve around a two day workshop for up to 36 people. Much of the work will take place in small groups, with regular feedback in plenary sessions so that learning and information is shared with all the participants.

The programme for the two days will be planned in detail with the local planning group, but this is likely to follow in broad terms the ideas as set out in the following sections.

The role of the Carers Impact Development Consultants during the workshop is primarily one of facilitation and will include:

- ensuring every voice is equally heard
- managing the structure and programme of the day
- juggling time (if required)
- ensuring tasks are clear and realistic.

Everyone taking part in the workshop will be expected to adhere to the following ground rules:

- every voice is equally important
- no jargon
- the discussions are confidential

Day 1: Taking Stock

Aims:

- to take stock of the work to date in supporting carers
- to share the different perspectives of all the workshop participants
- to begin to identify successes and areas of difficulty
- to ask the 'un-asked questions' (check out the gaps in established good practice see *appendix III*).

The programme will include:

- welcome and introductions
- introduction to Carers Impact and the aims of the workshop

The core work of the day will be 'taking stock' and looking to the future. This will include:

- building a picture of what is happening in the area for carers
- identifying trends and what seems to work well and not so well
- agreeing a set of values
- creating an ideal future

Day 2: Taking Action

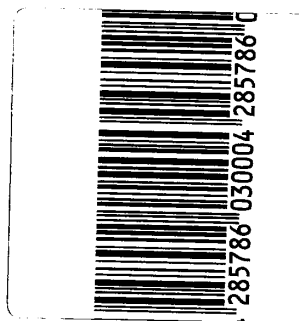
Aims:

to decide:

- what we want to move forward
- how we get there
- how we deal with constraints
- how we know when we have got there

The programme will include:

- agreeing priority areas for action
- translating priorities into action plans -
 - the aims
 - the tasks
 - by when
 - by whom
 - how you will know when you have got there
- next steps



Checklist for Taking Stock

The following checklist has been taken from recent SSI reports and guidance (What Next for Carers, Caring Today, A Way ahead for Carers) and the audit tool within Strategies for Change, A Carers Impact Resource Book (1996).

Strategy Development

- Are all policies relating to carers summarised in a single document?
- Have carers been involved in drawing up this document?
- Is there a clear implementation plan for the strategy which identifies
 - timescales
 - who is responsible
 - costs and sources of funding
- Is this a joint document shared between agencies?
- Has this document been disseminated to all staff and carers?
- Is there a joint planning / working group developing and monitoring the implementation of the strategy to support carers?
- Are carers involved in this work?
- Does this group link into community care planning and joint commissioning structures?

Planning Information

- Are you developing a map of local needs, using databases, registers, surveys etc.? Are you also obtaining information from:
 - service audits?
 - complaints analysis?
 - assessments and care managers?

Involving carers

- Is it always clear how carers are to be involved (structures for consultation) and why carers should be involved (aims and boundaries of consultation)?

- Are carers involved in
 - strategic planning
 - service development
 - changing practice?
- Could more/different practical support be offered to enable carers to be involved?
- Are there arrangements for consulting:
 - young carers?
 - black and minority ethnic carers?
 - other hard to reach groups?
- Are there arrangements to provide feedback to carers after every consultation and involvement exercise?

Information For Carers

- Is there a joint information dissemination strategy?
- Are voluntary organisations involved and supported in this strategy?
- Is information provided through face to face communication as well as in the form of leaflets, booklets and posters?
- Has information for carers been developed with carers involved from the beginning?
- Is information tailored to the needs of particular groups of carers?
- Is the right information available at the right time? (e.g. at discharge from hospital)
- Is your information strategy monitored by carers? (for example using focus groups or consultation rounds to get feedback?)

Assessing needs and Care Planning

- Is it part of routine assessment practice to inform any carer who appears to be eligible under the Carers (Recognition and Services) Act of their right to request an assessment?
- Do hospital discharge procedures take account of the Carers Act and involve carers in discharge planning
- Do your assessment procedures explicitly make provision for carers to be seen separately, and in private, if they wish?
- Are there full practice guidelines (with training backup) which address:
 - the timing of assessment
 - sensitivity to two way caring relationships

- providing information to carers at the time of assessment
 - awareness of the needs of carers from minority ethnic communities?
- Do carers always receive a copy of the written care plan, including how emergencies will be covered?
 - Are there criteria for establishing regular reviews which address carers issues? (e.g. health of carer is at risk/ where care packages rely heavily on informal care/ where there is conflict between users and carers)
 - Are assessments sensitive to the needs of carers from minority ethnic communities?

Providing Services

- Are you developing mainstream services (services available to all users) to be more carer friendly?
- Are special initiatives or projects for carers developed with carers?
- Are special projects part of the overall strategy for carers?
- Do projects support carers independence and control over their own lives?
- Are services available which are appropriate to all local communities?
- Do you offer flexible short term respite care for people of all ages?

Monitoring Services

- Are commissioners making clear how they expect providers to meet carers' needs?
- Are carers involved in setting standards, designing specifications and monitoring?
- Is information used from:
 - listening to carers
 - assessments and care managers
 - complaints?
- Is good practice ensured through:
 - supervision
 - reviewing case files
 - performance indicators
 - involving carers in staff training
 - providing /updating written guidance for staff
 - providing joint training across agencies?

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