



Appendix 'A'

Shared Lives Service Review of assessment process for carers

Customer Experience Project Report



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This work has been carried out in partnership with the Shared Lives Service, the Corporate Policy and Performance Team, Rebecca Addey (Graduate Management Trainee) and the Corporate Research and Intelligence team.

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1.0 Introduction

The Customer Experience Project is aimed to gain a better understanding of the customer experience of Lancashire County Council services and how they relate to the front line staff experience of delivering services. Responding to the results of such research is intended to facilitate service level improvements.

This Customer Experience Project was commissioned by the Shared Lives Service to gain a better understanding of how carers perceive the application/assessment process of the service, which is delivered by the Adult and Community Services directorate. This research focuses upon the experiences of carers who have recently completed the assessment process.

1.1 Background

The Shared Lives Service (formerly known as the Adult Placement Service) is family-based care provided by individuals and families which enables adults to live with a family, sharing in family and community life, as well as helping people to develop their strengths and abilities.

Being a Shared Lives carer involves supporting people to meet their emotional, social, health, occupational and educational needs; enabling people to maintain existing friendships and develop new ones, and to gain the confidence and skills to become as independent as possible. Carers do this by offering long-term placements, short-term breaks, daytime support, or emergency care.

Following investment of £650,000 through Invest to Save funding, the service is growing at a significant rate with a strong emphasis being placed on streamlining processes, modernising information and developing new areas of support. The service currently supports over 180 Shared Lives Carers throughout the county.

As part of the recruitment process all Shared Lives Carers are taken through an in-depth assessment before approval via an Approval Panel made up of a Chair, service managers, personal social care representatives and a volunteer who has knowledge of the service. Following approval training and support is provided by the service, the carers are introduced to customers who wish to access the Shared Lives Service either for Long Term Support or for Short Breaks.

The service offers cost effective high quality supports to people with disabilities, older adults and people with mental health issues. Without increasing the number of additional Shared Lives Carers the service cannot continue to grow.

1.2 Research objectives

This research was scoped around the services' key themes. The objectives of the research were to find out;

- how carers first heard about the Shared Lives Service.
- the carers' experiences of the length of the assessment process.
- which services the carers wish to provide, and to whom.
- what the carers' relationship was like with the Shared Lives Team.
- the carers' experiences of the support they received and required during the assessment process.
- how the carers prefer to engage with the Shared Lives Team.

1.3 Methodology

Identifying a suitable project

An initial meeting was held with the service lead to identify specific areas of research for this project.

This research project was commissioned with the intention of obtaining data to allow the service to develop a deeper understanding of the views of the Shared Lives Carers regarding the application and assessment processes. Research participants were not limited to a small geographical area: the Shared Lives Service covers the whole of Lancashire and the research was aimed to give insight into the differences in service levels across the county. The service lead communicated with Shared Lives Officers throughout Lancashire to identify suitable participants who have recently completed the assessment process. Fifteen interviews were planned across the three locality areas of Lancashire; East, North and Central. Fourteen interviews took place as one participant dropped out of the research due to time constraints.

The nominated Shared Lives Officers contacted each of the proposed participants to introduce them to the project and ensure they wished to participate. They were then contacted to arrange suitable times for the interviews to take place. Nine of the interviews were conducted by one person with the use of a Dictaphone to ensure all information was recorded. Five of the interviews were conducted by two people for ease of recording the information.

Approach

The most appropriate method for conducting the research was discussed. The approaches of using case studies or individual interviews were considered and compared, with the strengths and limitations of each being evaluated. A case study can produce a more

detailed picture of an individual than other methods do. They are generally less structured so allow a true representation of the topic being studied. Individual interviews may allow someone to offer opinions they would not be comfortable speaking about in front of others.

With the aim of attaining the best information possible, participants had to be made to feel comfortable and relaxed which would help information to flow freely. It was therefore decided that individual interviews were the most suitable method for conducting the research. It was also agreed that in order to enhance the informal and relaxed atmosphere, interviewers would visit in casual clothing.

There were some cases where a face to face interview was not convenient for the applicant and so telephone interviews were used in these examples. Two of the interviews were conducted via telephone due to the participants' working schedules and this was a more convenient method for them.

The interview templates (see appendix A) were designed by the interviewer in consultation with the service. The interviews were to be conversational in nature, so the template was used only as a discussion guide to ensure the key objectives were met.

Who conducted this research?

The research was conducted by Rebecca Addey, Graduate Management Trainee. In the five interviews where there were two interviewers, the interviewers were Rebecca Addey and Charlotte Bracher, also a Graduate Management Trainee.

Shared Lives Service leads supporting the Customer Experience Project were Mike Schofield and Heather Bryan.

Fieldwork dates

The research was gathered between 30 January 2013 and 14 February 2013.

1.4 Limitations

The nature of face to face interviews meant that only a small percentage of carers can participate. This means that the interviews do not offer results that are statistically representative for all carers in Lancashire; they only offer a snapshot of the opinions of Shared Lives carers. Results are therefore attributed to participants only and not the wider population.

2.0 Executive Summary

This research focused on the application/assessment process for people wishing to become Shared Lives carers. It took place in the form of interviews across Lancashire.

The research found that there are high levels of satisfaction amongst the Shared Lives carers in relation to the application/assessment process. However a number of issues did arise, which recurred throughout a number of participant's opinions and were mainly related to the promotion of the service and the availability of information on areas such as finance and self employment.

2.1 Main findings

The main findings from the research are:

- The majority of participants first heard about the Shared Lives service through word of mouth.
- The majority of carer assessments took over 4 months from application to approval.
- Many found the assessment process to be too lengthy, though they felt the questions asked were very thorough and relevant to the nature of the service.
- The majority of participants are generally pleased with the service and would recommend becoming a Shared Lives carer to others.
- Key qualities that participants feel are important attributes of the Shared Lives team are a personable service, good communication and approachable staff. The majority of participants described the support they have received as very good across all areas of Lancashire.
- Most participants prefer to communicate with the service through email, telephone and face to face.
- Several participants felt there is a lack of clarity on information such as the payment system, insurance, self employment and the voucher scheme.

2.2 Recommendations

- Promotion of the service for potential carers through accessible channels such as supermarkets, libraries and public transport.
- Promotion of the service for potential service users through an increase of communication/promotion across other professions such as Social Services to encourage an increase in referrals.
- Assign a member of the Shared Lives team as a specialist for the payment system process. This person should have full knowledge of the system and should be able to resolve issues/queries surrounding this.

- Implement an 'Introduction pack' for carers undergoing the assessment process. This could include detailed information sheets, outlines on what to expect, guidelines for completing processes and contacts for support.
- Support an increase in communication between the Shared Lives team and carers. It has been recommended that contact should be made monthly to advise on progress and share information.
- Monthly carer meetings available throughout Lancashire for all carers.

3.0 Main research findings

Due to the nature of the interviews taken place, the results are presented in this section by subheading.

3.1 Demographics

Fourteen interviews were carried out across Lancashire; five in East, five in Central and four in North.

Eight females and six couples were interviewed.

None of those interviewed considered themselves to be disabled.

Three of those interviewed fit into the 18-39 age range, and 11 fit into the 40-65 age range.

Nine of those interviewed had been through the assessment process and approved as a shared lives carer for 0-6 months. Five of those interviewed had been through the assessment process and approved for 6+ months.

How did you first hear about the Shared Lives Service?

Area	East	Central	North	Total
Word of mouth (recommended by Shared Lives carer)	3	1	2	6
Word of mouth (other)	0	1	0	1
LCC website	0	0	1	1
Posters/leaflets	0	0	0	0
Other*	2	3	1	6

*Other includes: In Sainsburys- staff promotion, Conversion from foster placement (3), previously worked as a social worker and already knew about the service (2)

The most prominent means of first hearing about the service is through word of mouth from current Shared Lives carers (6) and through other sources (6). No participants first heard about the Shared Lives service through posters/leaflets commissioned by the service. One participant first heard about the service through the Lancashire County Council website; however they were looking for work in the caring sector rather than specifically

looking at becoming a Shared Lives Carer. One participant first heard about the service through word of mouth by a friend who already knew about the service.

3.2 The assessment process

How long did the assessment take from initial application to approval?

Area	East	Central	North	Total
Up to 2 months	0	1	0	1
2-3 months	2	1	0	3
4-5 months	0	2	3	5
6 months +	3	1	1	5

What was your experience of the assessment process? (the length of the process)

Area	East	Central	North	Total
Not long enough	0	0	0	0
About right	2	3	1	6
Too long	3	2	3	8

Participants whose assessment process took 5+ months from initial enquiry to approval felt that this amount of time was too long as there was an unnecessary gap in between the stages of assessment. Those participants whose assessment process took 0-4 months from initial enquiry to approval felt that this amount of time was right.

There is a link between the locality area and how long the participants felt the assessment process took. The majority of participants who live in North Lancashire felt that the process was too long.

What was your experience of the assessment process (comments)

The following comments were made relating to the length of the application/assessment process;

- It was quite quick; 3 months (3)
- It took too long; 13-14 months (2). Both participants who commented on this are located in East.
- Shared Lives Team lost the applicant's paperwork- slowing the process down (2). This was in North and Central localities.
- Participant can see why it should take such a long time (1)
- A slow, but thorough process (1)
- A lengthy process, but worth it (1)
- Lots of 'red tape' slowing the process down (1)
- A slow process (1)
- The process took a while to get started after initial contact was made (1)
- Staff changes broke down the process (1)
- The process took far too long and the service had to be chased up (1)

There were no correlations, apart from those already outlined, between the locality area and the comments made in relation to the length of the application/assessment process.

The following comments were made relating to the questions that were asked during the application/assessment process;

- Thorough (9)
- In depth, but this is how it should be (5)
- Appropriate (4)
- Realistic (2)
- Relevant (2)
- Gave the participant opportunity to think about things not already considered (1)

There were no correlations between the locality area and the comments made in relation to the questions that were asked during the application/assessment process.

The following comments were made relating to the general relationship the participant had with the Shared Lives team during the application/assessment process;

- Good (4)
- Supportive (3)
- Very supportive (2)

- Excellent (2)
- Very Good (2)
- Mixed depending on person- some staff aren't very personable (1)

There were no correlations between the locality area and the comments made in relation to the relationship between participants and the Shared Lives Team.

As a Shared Lives Carer, which services have you signed up to delivering?

Area	East	Central	North	Total
Long term support	5	4	4	13
Short term support /Respite	5	5	4	14
Day Support	2	3	1	6
People with mental health issues	0	0	1	1
Alcohol/ drug rehabilitation	0	0	1	1
Older people	0	2	1	3

Do you know about all of the services that carers can consider being involved with?

Area	East	Central	North	Total
Yes	5	3	4	12
No	0	2	0	2

When asked which services the participants have signed up to delivering, the interviewer went through the different services outlined by the service leads. Following on, participants were asked if there were any services they hadn't previously known about.

If no, which services didn't they know about?

- People with mental health issues (2)
- Older people (2)
- Alcohol/drug rehabilitation (2)

There were clear results from this category with the types of care that participants wish to provide. Long term support (13), short term support/ respite (14) were the most prevalent, with 6 participants stating that they are interested in providing day support. Three participants wished to provide support to older people. One participant wished to provide support to people with mental health issues or individuals requiring alcohol/ drug rehabilitation.

When asked if they knew about all the services that Shared Lives service offers, the majority of participants responded that they had (12) however two participants said that prior to the interview they were unaware that the service provided support to people with mental health issues, older people and people requiring alcohol/drug rehabilitation. These two participants both live in the Central area of Lancashire.

Which of our customers would you be interested in supporting?

Area	East	Central	North	Total
People with Learning disabilities	5	5	4	14
Older adults	4	5	2	11
Adults with early stage dementia	3	4	2	9
Young people recovering from mental health issues*	3	3	3	9
People with Physical disabilities**	2	1	3	6
Young people recovering from alcohol or substance misuse*	1	3	2	6

*Four participants commented that this is dependent however on individuals' circumstances and one participant said this would depend on the availability of relevant training.

** Four participants said this is dependent on the individual's level of ability

All participants stated that they would be interested in supporting individuals with learning disabilities. Eleven participants would be interested in supporting older adults and nine participants would be interested in supporting adults with early stage dementia and young people recovering from mental health issues. Six participants would be interested in supporting individuals with a physical disability and young people recovering from alcohol/substance misuse.

There was no correlation between locality areas and the customers that participants would be interested in supporting. An exception to this is people with physical disabilities as only one participant living in the East area was interested in providing support to someone with a physical disability.

Participants across all areas were interested in supporting people with learning disabilities and older people.

Would you consider having any funded adaptations made to your house to enable you to support someone with a physical disability?

Area	East	Central	North	Total
Yes	3	1	2	6
No	2	4	2	8

Further comments about having funded adaptations made to their house

Yes

- If it was for a long term placement (2)
- It would depend on how much needed to be done (1)
- Maybe eventually, though not immediately (3)

No

- It wouldn't compliment their active lifestyle (2)
- Participant is currently renting- unable to adapt the house

3.3 The relationship with the Shared Lives Team

How would you describe the support you received from the Shared Lives Team?

	Very Poor	Poor	Average	Good	Very Good
Quality of information provided	0	1*	0	1	12
Professionalism	0	0	0	1	13
Reliability	0	0	0	1	13
Support and issues	0	1**	0	2	11

*The participant(s) felt there was a lack of communication

**The participant(s) commented that nobody in the Shared Lives Team seemed to have full understanding of the financial side of the service. The participant(s) felt that when they contacted the Shared Lives Team for support with an issue they were being passed around and didn't receive a clear answer.

What do you think makes a good relationship with the Shared Lives Team?

- A personable service (9)
- Good communication (9)
- Approachable staff (7)
- Knowledgeable staff (4)
- Staff who are understanding of the carers' needs (3)
- Honesty between staff and carers (3)
- Trust between staff and carers (3)
- Staff who are contactable (2)
- Staff who are supportive (2)
- Good teamwork between staff (1)
- Proactive staff (1)
- Professional staff (1)

3.4 Experience of the support during the assessment process

How do you feel about your first placement?

Area	East	Central	North
Not at all prepared	0	0	0
Not prepared	0	0	0
Average/Unsure	0	0	1
Well prepared	0	2	0
Very well prepared	5	3	3

Further comments

- Two participant(s) weren't clear what the carers should be paying for and what the clients should be paying for
- Two participants weren't clear how the voucher scheme worked- confusing.
- Two participants weren't sure how the insurance system worked.

Do you think further support would be beneficial to your placement? If yes, please explain what support you would like and how it would be beneficial to you.

- If the carer is awaiting a placement, it would be beneficial if the Shared Lives team contacted them once a month to let them know they haven't been forgotten (1)
- Detailed information on the payment system to make this clearer (2)
- Personal profiles for individuals sent in digital form to enable participant to organise the information to suit them (1)
- Information on the benefits for being a Shared Lives carer (e.g., bus passes) (1)
- Shadowing another carer prior to the first placement (1)
- Detailed information on what the carer/individual should be paying for (2)
- Information on local activities for the individuals (1)
- Regular, local meetings with other carers to share information and form extra areas for support (1)
- Emergency contact details for out of office hours (1)
- Clearly defined information/guidelines on what to expect (1)

How do you prefer to engage with the service?

In some of the responses, participants provided more than one preferred method of communication.

Area	East	Central	North
Email	2	4	3
Telephone	3	4	4
Letter	0	0	0
Face to face	4	4	0
Other*	0	0	1

*Other: Via text

Further comments following the interview:

- It is a rewarding scheme (7)
- The Shared Lives staff are very approachable and supportive (7)
- The assessment process works particularly well (2)
- The participants are very happy with the service, and wish they had done it sooner (2)
- The carer meetings are an excellent source of support (2)
- The Shared Lives Service needs better promotion (7)
- It took too long to get the first placement following approval (4)
- There was a lack of clarity about the payment system (4)
- There were problems/lack of clarity with the insurance system (2)
- The participant(s) were unsure about how to arrange the self employment/tax (1)
- It would be beneficial to have training sessions just for the Shared Lives carers to enable them to be more specific (1)
- Communication between the Shared Lives Team and carers needs to improve (1)
- There needs to be more clarity on how the placement system works for new carers (1)

4.0 Conclusions and recommendations

The main findings from the interviews are:

Liked about the service

There was a wide agreement that the Shared Lives Team are very approachable and supportive. This is particularly relevant as the 3 key qualities that participants felt the Shared Lives Team should possess are 'personable', 'good communication' and 'approachable staff'. Similarly 2 participants commented that they are really happy with the service that the Shared Lives Team provides, and they wish they had begun the assessment process sooner.

Seven out of the 14 participants commented that the Shared Lives Service provides a very rewarding scheme and a further 2 participants commented that they feel the assessment process works particularly well.

Areas for improvement

When the participants asked if there was anything they felt could be improved upon, there seemed to be one clear response given as opposed to several negative experiences.

In general, it took a period of consideration before any responses were thought of. This contrasted with the positive aspects, which usually prompted responses immediately. This period of contemplation would suggest that they were not considered to be overriding issues in comparison to the perceived benefits of being a Shared Lives carer and were mainly related to promotion of the service, the length of the assessment process and clarity of information.

Promotion of the service

When asked if there was anything else they would like to add that wasn't covered in the interview, 7 out of the 14 participants commented that they feel the service needs better promotion, both for carers and users of the service. This correlates with how the majority of participants first heard about the service, as only 2 had heard about it from an outside source- all other participants heard about the service through word of mouth or were already involved in the social care field through their occupation or foster placements.

There was also a general consensus that the service needs to be better promoted to potential service users. Four participants commented that it took too long following approval to host the first placement despite them being open to all types of placement. These participants experienced on average a five month wait for the first placement following approval. The participants felt this was due to a limited number of people accessing the service due to a lack of promotion. One participant who works in the health and social care field commented that there seemed to be a lack of knowledge of the service

amongst other professionals and as such, suitable opportunities for referral were being missed.

In terms of the different services that Shared Lives Service provides, there was a correlation between the areas participants live in and the information they received about the services they can offer. Two participants living in the Central area were unaware they can also provide support to older people, people with mental health issues and people recovering from alcohol and drug addiction. In contrast to this, all participants living in the North and East areas were aware of all the services they can provide.

Assessment process

The majority of participants who live in North Lancashire felt that the process was too long. The majority of participants responded that the process took between 4-6+ months (10 participants).

For those who had felt the process took too long (8 participants), the process had taken 4-14 months to complete, with the exception of one participant where the process had taken 4 months to complete. For those who had felt the process length was 'about right' (6 participants), the process had taken 1-6 months to complete. It could be concluded from these interviews therefore that in general, participants feel that 6+ months is too long for the process to complete.

When asked for further comments on the length of the process three participants said they could see why this process would take so long and one participant said that it was worth the wait. Other comments suggest that the process was unnecessarily slowed down due to administration issues.

In terms of the content of the assessment process, the general consensus was that the questions asked were relevant, thorough and appropriate for the role. Some participants commented that this is how it should be for a service that is supporting vulnerable adults.

Communication channels

The preferred communication channels amongst participants certainly seemed to be email and telephone. Many of those questioned felt that this would be the most effective way of contacting them with information. Similarly, many participants commented that face to face was their preferred communication channel for matters such as interviews and first contacts.

None of the participants preferred letters as a channel for communication and many commented that this channel is too slow, information can become lost.

Clarity of information

Many of the negative experiences of the participants were due to a lack of clarity over information. Recurring issues were the payment system, insurance, the voucher system and self employment/tax. Participants commented on a lack of clear information in these areas and some suggested that some members of the Shared Lives Team were also unclear with these systems. Two participants felt they were unclear about what they should be paying for, and what the service user should be paying for.

Overall conclusions

Overall it can be concluded that there are high levels of satisfaction amongst the carers who were interviewed. The relationship aspect between the carers and the Shared Lives team is highly valued. A recurring issue in the research is that the length of the assessment process is too slow. Given the option, the participants would change little about how the service is run throughout the assessment process, but would like to see it expanded through further promotion and would like access to clearer information.

4.1 Recommendations

- The lack of promotion of the service for potential carers was a clear recurring theme throughout the interviews. While there is some pre-existing promotional material for the service in the form of postcards and posters, it appears to be that the information is not being circulated widely enough outside of the health and social care setting. The service should look at ways in which the wider public can be made aware of the Shared Lives Service.
- The lack of promotion of the service for new service users was another recurring theme. It is recommended that the Shared Lives service reviews its information sharing systems with other professionals and services.
- As promotion and the need for information were two areas that were brought up frequently, it may be beneficial for details on the Shared Lives Service web page to be updated and expanded to include more in depth information on the different services Shared Lives offers, the support available and what to expect as a Shared Lives carer. This could be beneficial for both prospective and current carers.
- One issue that seemed to come up frequently was the lack of clarity surrounding the payment system, including when carers would be paid and a breakdown of the payment. As some participants commented that when clarity was sought on this they were passed around Shared Lives staff, it is recommended that the service either assigns a small number of staff member as a specialist for the payment system and to act as a point of contact for all issues on this subject, or to review the level of training and understanding all the staff have on this and increase the understanding where deemed necessary.
- There was a recurring theme surrounding the lack of clarity about the payment system, what carers should be paying for, insurance, the voucher system and self employment/tax. The service should look at providing an introduction pack for prospective carers. This would include detailed information on each of the above mentioned areas, as well as outlining what to expect as a Shared Lives Carer, as well as contacts for further support.
- As the length of time that the assessment process took was seen to be too long, it is recommended that the service looks to implement a system whereby applicant carers are contacted by the service on a monthly basis to update them on progress and for reassurance. This could also be adapted for approved carers who are awaiting placements.
- The service should request for each prospective carers' preferred channel of communication to ensure they are being reached most effectively.