

Appendix 1: Triangle of Care self-assessment tool

Tips and Guidance for staff completing the self-assessment tool

The Triangle of Care self-assessment tool enables mental health providers to assess their services on a ward by ward or team by team basis.

The tool is easy to use and involves a simple traffic light system for assessing service delivery.

Guidance notes have been developed as a result of feedback from members of the Triangle of Care Steering Group who have begun to assess their services.

General guidance

- **Consistency** – although individual units and teams can complete the self-assessment; it is recommended that all teams complete the tool at the same time as a coordinated exercise. Ideally, completed self-assessments are sent to an independent person (ward manager or carer lead) to review. The review should check the ratings and action points are consistent. This will also enable identification of common issues across teams, identify good practice and share this across the organisation.
- **Honesty and candor** – adopting this principle will benefit the organisation or team when completing the self-assessment. Staff who have completed the tool previously have found it a more positive experience to adopt a warts-and-all approach. This enables teams to see what they are doing well and be able to action plan more clearly for areas that require improvement. No team or ward is expected to be perfect and some deficits are to be expected. It is crucial to convey to teams that these deficits will not be punished and it is recommended that no league table system is adopted.
- **Traffic light ratings** – there is an expectation that when awarding a green traffic light the team should have over 80% success rate. An amber traffic light requires 50% or over.
 - For example: **criteria 1.1 identifying the carer routinely**; this should be occurring with 80% or more of carers.
 - Another example is **criteria 2.1 staff have received carer awareness training**; this should be when 80% of staff have either received the training or are booked on to it and when the training is up to date and relevant. Crucially this 80% must include the most senior staff on the ward/team including psychiatrists.
- **Clarity** – to ensure accuracy it is advised that figures used are evidenced, for example checked against training records.
- **The By whom Section of the form** – this section should include the name of the person completing the form; if this is not a senior member of staff then they must counter-sign. It may also be beneficial to include the name of the person who will be responsible for this area as this gives the whole team responsibility for the project.

