

Social Work with Carers

Methodology: Reflective account

1. Introduction

This is a reflective account of the methodology used to develop the [social work with carers](#) resources. Its aim is to:

- Ensure transparency about the approach taken
- Explain the methods used
- Identify learning from this approach to inform other work.

This account uses the reflective cycle that is incorporated into the [Critical Reflection Tool](#) as part of the resources. This cycle covers what happened; reflection and analysis of what happened to develop learning; and planning to use the learning (RiPFA 2013). It enables experience to be turned into learning that can be applied in future work.

2. About the project

Research in Practice for Adults (RiPFA) was commissioned by the Department of Health (DH) to create a resource to support effective, good quality social work with carers through providing learning and development resources. The aim was to improve the experience of carers in social work interactions.

RiPFA developed a proposal setting out that the resource would be co-produced as far as possible with carers. The resource would be based on a micro-site and would include:

- A review of what was known already about practice
- Case studies that covered specific caring situations
- Case file information
- Tools
- Mapping of these resources to the Knowledge and Skills Statement for adults (KSS) and the Professional Capabilities Framework (PCF)
- A webinar to describe the resources
- Train-the-trainer workshops and materials to support use of the resources.

3. What happened

Values

The values that we worked to were:

- Involvement - of people with lived experience through co-production
- Authenticity - of the resources so that they reflected real experience

- Evidence-informed – **resources that draw on carers’ views, practice experience and research**
- Helpfulness – of resources that are accessible, relevant and practical.

Approach

DH specified that the case studies would be based around five particular situations:

1. Sandwich carer caring for a parent and for a child.
2. Young carer supporting a parent with a mental health problem.
3. Partner carer supporting a partner who is moving into a care home
4. Partner carer supporting a partner who has a life-limiting illness.
5. Parent carers supporting an adult child with a learning disability.

DH also identified some topics that the resource should cover and surveyed the Principal Social Worker (PSW) network to ascertain development needs in this practice area.

A project team was established in RiPFA led by a project manager with seven staff and associates who had expertise in: social work practice; training transfer; scoping evidence; product development; and information technology.

Carers UK and Carers Trust were approached to recruit carers for the project. They were given the five situations and asked to recruit carers who were prepared to share their experience and would be able to comment on the situation.

Practitioners were recruited via the PSW network to co-produce the case studies with carers and RiPFA.

Steps in the project

The main steps in the project were:

Month	Activity
Nov 2015	Develop methods for the case studies
Dec 2015	Recruit carers and set up workshop for carers
Jan 2016	Hold workshop for carers
Feb 2016	Develop draft case study materials; plan microsite
March 2016	Review materials with carers
April 2016	Revise materials; develop train-the-trainer sessions and professional development resources; develop supporting materials
May 2016	Hold train-the-trainer sessions; finalise all materials and microsite

Methods used

[Practice evidence: An overview](#)

We carried out a review of the evidence around social work with carers. This was not a robust literature review, as that was outside the scope of this project. Its aim was to support the development of the resources, to ensure that they did not duplicate existing resources and to identify gaps. The approach was to:

- Look at evidence from the last five years available on the web in the English language, including academic literature, government policy and examples of good practice
- Identify materials related to the knowledge and theory of social work practice with adults (over the age of 18) and carers, young carers and parent/ carers of children with particular needs in transition into adulthood
- Identify themes and messages related to social work effectiveness or effective work from other professions or multi-agency arenas that was transferrable.

The review therefore included: introduction; scope; definitions; research by theme; gaps in the evidence; summary messages, emerging themes; and references.

This approach reflects RiPFA's commitment to evidence-informed practice; that is, to drawing on lived experience, practitioner experience and research evidence to identify implications and messages for practice. In evidence-informed practice, all three sources of evidence are valuable **and interact with each other to enrich practitioners' professional judgement** (e.g. Nevo and Slonim-Nevo 2011).

[Case studies](#)

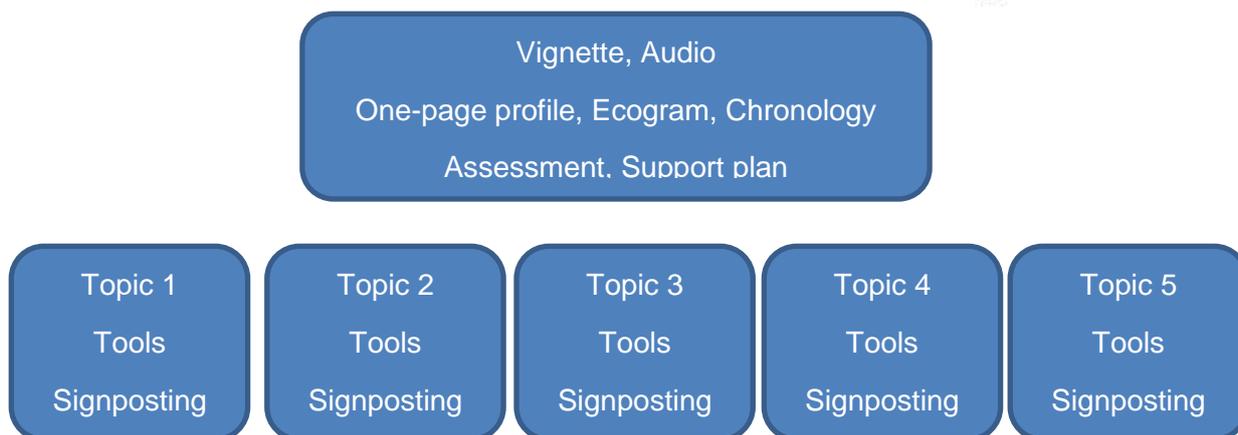
The case studies were, as far as possible, co-produced with carers and practitioners. The brief had identified five situations and themes that we needed to incorporate. We had also identified a structure for the case materials (see below). This included the tools that we would use to present the case studies. These drew on good practice in person-centred work (e.g. Sanderson and Lewis 2012) and the Care Act 2014 requirements. We reviewed research around the use of vignettes (e.g. Nygren and Oltedal 2015, Bradbury-Jones et al 2012) and identified some key principles. We looked at a range of local authority assessments, chronologies and support plans, and developed templates that incorporated elements which met Care Act duties and good practice in assessment and outcomes (see e.g. RiPFA 2014 and RiPFA 2014b).

We used the following definition and principles of co-production (SCIE 2015):

“To co-produce is to make something together.”

- Equality, everyone has assets – although we had some parameters set for the case studies, carers and practitioners created all the details for the case studies; we used **participants' words**
- Diversity – Carers UK and Carers Trust recruited a wide range of carers in terms of age, ethnicity, locality and experience
- Accessibility – we met in an accessible time and place; we facilitated group work that enabled everyone to share their experience
- Reciprocity – we covered expenses and **acknowledged carers' vital input to the resource.**

Case study X



We held a workshop with 17 carers and four practitioners. We presented them with some information about each case and a box of artefacts (see table below). In groups, carers with relevant lived experience and practitioners discussed the situation and identified:

- What does a typical day look like?
- What is the impact on you, the carer, of your caring role?
- What support do you have for yourself as a carer?
- What is important to you?
- What support do you think you need **to achieve what's important?**

These questions were based around the questions in local authority assessments.

Topics	Characteristics	What's in the box
Sandwich caring Carers' employment Life course and whole family approaches Assistive technology Dementia	Carer: Female, Early 40s Cared for: Male and Female children, Male father 70s White British	Letter from work Child's toy/ sweets Leaflet on assistive technology Print out of mobile phone messages from parent plus things from school
Transition into a care home Integrated work Transitions for carers Family complexity and conflict Identity and sexuality	Carer: Female, 70 Cared for: Female partner 80s White British	Pocket diary full of appointments and to do list Family member messages saying this isn't right Carer's support group information
End of life Living with dying	Carer: Female 90s	Thinking ahead to end of life leaflets Advance directive

Bereavement support Social isolation Religion and spirituality	Cared for: Male partner 90s White British	Power of attorney
Learning disability Attachment Risk enablement and independence Older family carers Ethnicity and culture and language	Carer: Male and Female 60s Cared for: Male child 30s Black British (Jamaican)	Prescription/ indication of ill-health of parents Family calendar Mobile phone messages from others saying he should go into independent living etc.

For young carers, we took a slightly different approach. We provided the details to a carers' service in Lincolnshire, who worked with 33 young carers to identify their answers to the questions.

We took away all the notes and amalgamated them into the case materials. We then met again with carers and practitioners and shared the draft materials. The same groups then commented and changed elements of the materials. We incorporated all of these changes in revised versions.

[Carers film](#)

This was not in the original plan. However, in the workshop carers spoke about their own experiences and of their hopes for the impact of the resource. We agreed that in the second workshop we would capture carers' views on film. This supported the co-production principle of working with people's assets (SCIE 2015).

[Practice tips](#)

During the first workshop, we asked carers to identify the top dos and don'ts for practice. We then amalgamated these into a long list. When we met with carers again, we asked each group to pick the top ten dos and the top five don'ts. We then amalgamated these into 12 dos and six don'ts in the Top tips for practice.

[Topics and tools](#)

We used the practice evidence review to provide evidence-informed messages for each topic. We used its references and searched [Social Care online](#) and the following websites: RiPFA; Social Care Institute of Excellence; Care Act guidance; NICE; British Association of Social Work; former College of Social Work resources; DH; Skills for Care; Carers UK and Carers Trust. For each topic we identified and wrote up:

- Useful documents to signpost to
- Tools

- Evidence to support tools that we then created.

[Overarching resources](#)

We identified that there was foundation knowledge that social workers needed for good practice with carers, based on the KSS and PCF. The resources that supported this were identified through the topics search. This included:

- General resources about social work
- General resources about caring
- General resources for social work with carers
- Law and policy
- Useful sites.

We created documents to signpost people to these, rather than seeking to replicate existing materials.

[Train-the-trainer and practice resources](#)

Training transfer research (e.g. RiPFA 2012) emphasises the importance of learners: identifying learning needs; reflecting on their learning; identifying actions and support to use the learning in practice; and evidencing their learning.

We therefore created:

- A [learning needs analysis](#), based on [capabilities for social work with carers](#) that we drew from the KSS and PCF
- A [critical reflection tool](#) based on Kolb's cycle
- An [action planning tool](#)
- A [continuing professional development record](#).

We developed [train-the-trainer materials](#) (powerpoint presentation with notes plus a workbook) for sessions to support workforce development and professional leads to use the materials. These drew on training transfer research and addressed:

- Learning objectives
- **Carers' views** – to ensure relevance to practice
- The context – to identify motivation
- The evidence – to ensure relevance to practice
- Barriers and enablers – to identify factors to support transfer of learning
- Practical work using the resources – to model and embed use
- Critical reflection and action planning – to identify learning and plan for its use.

We used the workshops as an opportunity to identify [top tips for trainers](#), [example session plans](#) and [example exercises](#) to support others to deliver training. We also used the workshops to gain feedback on the structure and clarity of the microsite.

[Microsite](#)

The microsite was developed based on the structure of the cases. We used learning from **feedback on RiPFA's main site and from the workshops to ensure that it was: uncluttered; clear;**

used plain English; used eye-catching quotes; and was accessible in terms of downloading materials.

[Webinar](#)

RiPFA held a webinar to introduce the resource. Again, this drew on training transfer evidence **and included: learning objectives; context; evidence; carers' voices; and practice in using the site.** It was recorded and put on the welcome page to support use of the resource.

4. Learning

In the workshop with carers we asked for feedback about their experience. Carers reported that the experience had been valuable and that we needed to ensure that it will have impact.

"I'm really pleased I've been able to have a voice; that voice needs to be heard for people who can't come today. We need to be their voice."

"I want this to be taken seriously. Not just rubber stamping."

Participants separately reported some individual impact from taking part:

"I had a lightbulb moment regarding the use of the spider grams and how useful they are...I have really found the time I have spent on this project insightful and it is helping to inform the practice of carer assessors."

"I want to give a simple example of what I discovered yesterday from one of the parents... this parent told me about the Kiloran Trust which is a service that offer respite for carers (not the cared for) and despite having lived in London all this time no one or any social worker has ever mentioned this to me. Now this is just amazing."

"I found it challenging - because I had to leave my loved one home alone to attend - and hugely informative. The benefit, for me, just about outweighs the disadvantages!! Hopefully positive outcomes for Carers for years to come will result."

Feedback from the train-the-trainer sessions and webinar was very positive in terms of the **resource, in particular the carers' film and the reality of the case studies.** It also identified the need to:

- Clarify how the resource fitted with other information about work with carers
- Clarity the law that underpinned practice with carers
- Link the resources to safeguarding as this was not covered in the case studies.

We also received feedback that we needed to be clearer about the methodology for developing the resource.

5. Use of the learning in future

The learning will be taken forward in the following ways:

For the social work with carers resource:

- Link to useful resources that already exist – we added links to law and policy, including safeguarding, based on the feedback we received

- Make sure that the methodology is clear – we have added this methodology
- Evaluate impact – we will be adding a survey to the website and following up with people who have been involved in sessions.

For future projects:

- Where possible, co-produce resources following the principles of co-production
- Use co-production from the start of a project through all stages
- Involve existing organisations to identify participants who have relevant experience
- Embed lived experience at the heart of practice resources
- Use multi-methods to meet different learning needs, styles and outcomes
- Continue to base resources on training transfer principles, and build in opportunities for feedback.

6. References

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