

[Speaker names have been omitted to maintain confidentiality]

Maintaining the Advocacy Relationship - Core 3 - Day 2

Conflicting experiences

Trainer 1: Conflict is something we have to deal with regularly and we need to look at and explore some of those conflicting issues to see how we manage and improve them. I want to think about your conflicting experiences. What do you come in contact with in your work?

They include:

- Professionals
- Compromise
- Family members
- Carers
- Clients wishes
- Best interest verses the client's wishes
- Clients that take up a lot of your time
- If a client wants something you don't agree with or can't support them with

Example 1

New speaker: I went to a meeting with a family to discuss issues and put things across. When I got there the meeting was about something different, I ended up supporting them on something I knew nothing about.

Trainer 2: How did you feel?

New speaker: I knew I was at a disadvantage. People realised I was.

Trainer 2: So it wasn't a set up then?

New speaker: They knew I didn't know it was up to the family to have told me.

Trainer 2: How did you feel about the family?

New speaker: It was embarrassing and I told them that had they told me I would have been able to help them. I was not sure what I could do. I have since written them a letter. I now know what I can and can't do when I work with them again in the future.

Example 2

New speaker: I exchanged letters with a service manager and told me that the information he was giving me was confidential between him and me.

Trainer 2: So you would have found out the information first before realising it was confidential.

New speaker: I told the family that I couldn't share the information and ended up playing a yes no game with them. In the end I did share it with them. it is a complex situation and I know that I am a small cog in the wheel for this family. I then made it clear to the service manager that he put me in an impossible situation and had to say that my loyalty is with the family.

New speaker: Professionals know that I have to share information.

New speaker: I did try to emphasise it. I spoke to his secretary and couldn't speak to him. I spent the whole afternoon wondering what I can do about it. I ended up sharing it.

Trainer 2: It sounds like you followed it up by explaining your role and that it couldn't be like that in the future. We have to be clear that the information we get could be passed on.

New speaker: I think this guy knew and he was trying to see if it would work.

Case study - Advocating for Sian

Q. How did you feel about advocating for Sian?

- Felt frustrated and angry
- Irritated
- Disempowered
- Invalidated
- Disenfranchised
- Unjust

Q. So you have been met with this response, how do you negotiate with them?

- Build on the positive as one member of staff is saying yes.
- Get a written statement and also having a statement from Sian.
- It is still a case of negotiating with the social worker. We tried also the principle social worker.
- We would talk to the client to move her out of the placement. Find out why she doesn't like it there and what she wanted.
- We picked up on the needs and wishes idea in a different way, such as care plan etc. We also need to understand the capacity issues.
- It is being sure what her real issues are first.
- Why she is so unhappy.
- If there is no capacity then there are implications there.

[See handouts on conflict styles and strategies]

People have different ways to deal with conflict. Look at it in your own time. It is not about being right or wrong, but how you can modify your style. There are some questions to look at also.

Styles include:

- People who like to avoid
- People who like to accommodate
- People who like to compete

There is also information on strategies.

Record keeping

Q. Why keep them records?

- Evidence for your portfolio!
- There might be an agreed deadline.
- Accountability
- Monitoring
- To help avoid and minimise disputes.
- To save asking the same questions over and over.

Q. Who do the records belong to?

- The client has access

Trainer 2: Can we sit here and say that we would be happy for any client to see what we had written?

Q. What things do we record?

- Phone calls made
- Emails sent
- Meetings I have for a client
- The purpose of the meeting
- What was said
- Actions
- How the person was on the day (record their behaviours in relation to the issue)
- If they are not able to communicate.
- I might write factual records rather than my opinion of it.

Q. Where do you record it?

- Files
- A front sheet which is mainly monitoring information. The front sheet also includes the key issues so that another person could get a quick snapshot.
- We keep individual case loads unless going on holiday. We keep them on plastic pockets. The referral sheet is case notes combined.
- People also self refer.

Fact or Opinion feedback [See handout on fact or opinion]

It is a fact if she said so?

It might be the first reported incident, but not the first necessarily.

What part isn't factual?

What are we looking at?

Whose standards are you using?

Where is it recorded?

Who said it?

Trainer 2: The context is also important. We need to understand the relevance of what we record. In essence there is not a long wrong with these statements. They are ambiguous though. We need factual information though. Thinking about what we record is important.

Trainer 1: There is also your own significance in writing records. People can be quite clever about how we write records and use sophisticated language to make us look clever and professional. I would want to keep records. For some that might be something to think about.

New speaker: I have also noticed that having started the portfolio I have been using different

language in my every day work so I can add it to my portfolio.

Exercise 1 on record keeping

This is about examining the subtlety of how words can mean different things in different contexts. On a scale of 1 - 100 say how much you would rate this.

*“Jayne **never** returns my phone calls”.*

*“Joseph **almost always** wears Jeans”.*

*“Jamine has **mild** learning difficulties”.* **10-50**

*“Connie is **sometimes** late in picking up her children”.* **10-70**

*“Geoff **never** wants to take his medication”* **0-100**

*“Pauline has a **serious** illness”* **10 -90**

*“Kevin is of **average** ability”* **10-60**

*“Parminder was badly **hurt** in the accident”* **10 - 90**

*“Kate is **naughty**”* **10-60**

*“Theresa is **very naughty**”* **20-85**

Trainer 1: This is the point of this exercise to see the meaning of the words.

New speaker: It is subjective.

Exercise 2 on record keeping

I will read a statement and I want you to tell me how many times it happens in a typical week.

*“Olive **occasionally** smokes cigarettes”.* How many times would that be in a week?

*“Leanne **often** misses the bus to work”.* How many times?

*“David **always** falls asleep on the couch”.* How often a week?

*“Pam is a **frequent** drinker”.* How many times a week?

*“I **never** get to work on time”.* How many times does that occur in a typical week?

Trainer 1: Words have meaning as they are assigned a meaning. If you say “I am feeling sad” then you assign a meaning. We might tone it up to gain power or down. There are obvious implications for records.

Q. What are the implications for record keeping?

- Be mindful of what you write.

- Specific and relevant.
- Be careful of the language you use

New speaker: You may not know it is not relevant until you have all the information.

Trainer 1: Yes. You get information too that is not relevant to begin, but very relevant later.

New speaker: It could be that some piece of information could transpire to be crucial or something we think is very important becomes irrelevant.

Exercise

I have made notes on an imaginary meeting with a client called Emma. These scribbled notes are similar to what you would do in a meeting. I want you to make a record of these notes. If this was your meeting, what would you put in your case file?

New speaker: I said, meeting with Emma, the date and time, provided her with complaints procedures information and she has decided not to progress with the complaint at this stage. Discussed the next review meeting, I put an action note in, after discussion it was agreed to have another meeting with social meeting. Next meeting to confirm she is still at the same place.

New speaker: The date I meet with her, discussed complaint, agreed support, left Emma with NHS complaints procedure, agreed to meet before next meeting to discuss what to say, date of next meeting and my initials.

New speaker: I would put the date, the meeting with Emma and to see the notes of the 13th.

New speaker: See pre notes on 13th and the notes for the next meeting.

New speaker: I do the same. I would give the date, not time, said that she had changed her mind, explained the process, accepted, actioned the dates, contact the social worker and arrange for....it is numbered with bullet point. On case notes I would put the dates and code it.

New speaker: One of the things I added was doing not wish to complain now at Emma's request. I added that on, but I think it will be good in the future.

New speaker: I intend to recap as well and with reference to not wishing to be blunt, to establish that this is still what she wants. Going forward seeing it is still the case.

Trainer 1: There seems to be a choice of which perspective the records are from. The point of "Emma said" or "Emma chose". The emphasis is on Emma, but then for James it is on what he did.

New speaker: It is about 'who' the recording is for you as the advocate or if the notes are for the advocate.

New speaker: I put potential complaint and client decided not to proceed.

New speaker: I put the purpose first and other issues that come up.

Trainer 1: So some of document the process and some document the outcome. What is best? Think about that.

New speaker: I put at start time and where.

Trainer 1: Is it important to note the duration of time?

New speaker: I have to for monitoring. We note that in a separate place.

Trainer 1: I think that the time communicates what the bullet points can't.

New speaker: You can also show you spend a lot of time with clients.

New speaker: I might say a long meeting - but that is ambiguous. I then think what have a done.

Trainer 1: It means nothing. That is good that you have identified that though.

Exercise

You will work over lunch and I want you to take a name of someone in the group and you are going to make observations of them over lunch.

You are not going to tell that person and be discrete. I would like you to make notes on observations, what did they do, eat, speak to and make notes. The notes don't have to be written. How did they feel what did they look like. Make some comments about them. Don't say I don't like her, she is a miserable cow. Make an assessment.

[Lunch]

Trainer 1: Did anyone's behaviour change as a result of being watched. I would encourage you to do a quick self reflective account about that exercise.

Values and beliefs

Q. What are values?

- Truths gained from upbringing
- Have a worth
- Affects how you behave
- Things you can't change
- Conditioning
- You can change your beliefs easier than you can your values.
- You change values when you can see a different perspective.

Individual task....

I want to do some work on your personal values in regard to your advocacy work. I want you to take space on your own and the values you work towards that are important to you and the values you move away from. I also want you to say what you value the most in advocacy.

Q. What are beliefs?

- I believe every individual is unique
- It is not based on anything
- It is a generalised view.
- Beliefs can be positive and negative

- imposed (the dominant ideology)
- People die for them
- Is it about social control

Exercise

Trainer 2: Thinking about beliefs can you get into groups of 4 with people you haven't worked with and choose an area to work on from the flip chart. Give us a list of beliefs on these groups.

Choose from the following:

Children's rights

Dementia

The service user movement

Best interests

Advocacy

Independent Mental Capacity Act

Disabilities

Children's Rights

- Teenage pregnancies get houses
- Teenage gangs are dangerous
- Teenagers let off lightly for crime
- Have it easy these days
- Parent's history are bad
- They are bad
- Stereotyping
- Have more rights today
- Do have a voice
- Children's act wants to keep families together
- Have no respect for elders
- Out of control
- Nanny state
- What happened to baby p and why was he denied rights
- Grow up too quickly
- Fear of children's rights in society
- More abuse now
- Media tells us there is more abuse
- If you are disabled too you are less equal
- Stranger danger.

Dementia beliefs

Our beliefs:

- Lack of understanding, resources,
- Old and mad
- Isolated
- Lack of capacity
- Aggressive
- Worthlessness
- Dignity

- Loss of respect
- lack of specialist care
- Not enough information
- Not talked about
- Inevitable because we live longer.

Disability beliefs

- Stupid
- Bad
- Ill
- Burden
- Excuse
- Not to have relationship
- Physical disability
- Pity
- A condition created by society
- Barriers can be overcome

Assessment

New speaker: The language is dreadful and it is hard to define what we need to do.

New speaker: I looked at the City and Guilds website and it also showed me that to identify a range of challenges, it would say range includes, x, y, z, so does it include all of that?

Trainer 2: They are an example, but you don't have to include all of them. It is just a trigger.

Trainer 1: I will send you them. There is no time limit - it has to be current and relevant. You have an assessor. Sue will do the qualification and assessment as I don't think she has the qualification to assess this qualification, so she can't sign off your portfolio. I will have to sign off the work as your assessor until she gets the qualification.

Learning outcomes - module 3

Who can remember the types of evidence?

I will rank in terms of best evidence

1. Observation - best because it is real and you have done. I will come and see your assessment practice. We think that a client observation is the best and giving you feedback on the one to one work you do with a client. Supervision might not be as important. As it doesn't have to be with a client who can't consent we will find you another method. A staff meeting would be good for the management unit. Observations can cross all units. As long as the observation relates, we can just do one.

Learning outcome 1

- Language barriers
- Confidentiality
- Independence

- Professional attitude
- Information sharing
- Promoting courses of action you don't agree with.

[You need more than one]

Think of a piece of work you have done in the last 6 months you have had to deal with and write that person's name down in the note column. If you have started then you have done it. These have done module 1 now so they can refer to a lot of evidence from the first course.

Learning outcome 1.2

*Observation (maybe a meeting with a social work team)

Witness testimony (observation from someone else)

Self reflective account

*Work product (case notes, letter, email, minutes of meetings)

Learning outcome 2.2 and 1.1

If you take your dilemma to supervision then the notes would identify you have identified practical solutions.

Questions and answers (I ask you questions and you answer to demonstrate you know what to do)

New speaker: What about a witness testimony? It is like an observation.

Trainer 1: You could have made it up

Trainer 2: Or you told them what to write.

Trainer 1: I wouldn't think it though! The witness testimonies are real.

New speaker: Thank you letters and cards?

Trainer 1: No that is a work product. It is real and it is something that happened as a product of the work. A feedback form is a work product. It doesn't really matter. There has to be one learning outcome that is observed. We are flexible. We are looking for a range of types. I would expect at least one of everything as the assessor. They don't have to be equally weighted. We want some of everything. Think about what you can get that provides the minimum work for you.

Learning outcome 1.2

Think how you responded to them to get a strategy to sort that out.

An action plan (work product)

Find was is the best use of your time.

Learning outcomes 1.3

Who helps you?

- Supervisor
- Manager
- Peer support
- Colleagues
- Professional
- Yourself

You cannot use libraries or Google etc. Think of whom you have sought advice from in the past.

Exercise

Complete the assessment plan in your organisations.

Evidence Finder – For portfolio

Trainer 1: I want to ask you now at the front of your portfolio an “evidence finder”. With the plan list the evidence with numbers etc and write what it is. It gives the assessor at a glance the range of evidence sources you are using. It is like a quality assurance check. That should take 10 minutes. If you do it module by module and do it at the beginning, then you will be able to see what you have used at a glance.

If you have a work product that you have labelled D with is an email, when you are in module four and you know that you need it, and then you could say it is evidence from module 1. Trust me it will make it easier now. The important bit is that as the assessor I can see every bit for the outcome.

Exercise on the advocacy relationship

The advocacy bit happens within the relationship and it is not something we give someone. It happens in the relationship. What you bring to the relationship impacts on it which impacts on the advocacy. We need to be reflectors, what we bring are personal motivations. Complete it individually and talk to your partner about answers.

[Evaluation form]

End of notes.

