

Sharing information to help  
people to find work in Bath and  
North East Somerset:  
Triage workshop findings

## Background

As part of the Government's Troubled Families initiative, Bath and North East Somerset (B&NES) Council established the Connecting Families service in 2013: to date it has worked intensively with over 300 local families to help them turn their lives around. In order to deliver targeted interventions to support these families to develop, thrive and achieve, Connecting Families shares information with a variety of partners, including statutory children's services and voluntary sector providers.

As part of B&NES '#onecouncil' commitment to collaborative working, the Connecting Families service has been exploring ways to encourage other services to 'Think Family' when triaging and assessing individuals who want to return to work, but may be prevented from doing so without intensive support to help them tackle a range of complex financial, social and emotional problems.

## How the Centre of Excellence has supported this work

The Centre has been supporting Connecting Families to engage these services in a number of forums: at a Think Family conference in June 2015, in meetings over the summer between the Connecting Families and Customer services teams to design and pilot an enhanced Welfare Support service, and at the launch of a worklessness virtual team in October 2015 to join up welfare to work services across the place.

Most recently, the Centre was asked to deliver a one-day workshop for Connecting Families, Welfare Support and Customer Services staff, in order to build on the progress they have already made in these areas, and support them to develop a new approach to triage for welfare support claimants and their families.

### **Purpose of workshop:**

The Centre's information sharing workshop provided an environment for delegates to focus on the various cultural aspects and barriers of information sharing they were experiencing. This was an opportunity to learn more about developing their current approaches to triage and assessment in order to draw out information sharing barriers and enablers. Using good practice examples and stories of success from our

work and from delegates' own experiences, they were encouraged to recognise barriers and begin to develop shared solutions.

The objective for the day was to encourage B&NES staff to think big, and think differently about how they can implement a consistent approach to triaging their welfare support clients, and bring their partners on board with this approach. The workshop included a mix of presentations, small group and pair discussions, interactive exercises and games, designed to stimulate creative and original thinking to solve tricky information sharing issues.

The sessions were facilitated by Jovian Smalley and Stuart Bolton, two Engagement Managers working in B&NES, with input on content and structure from a number of other Centre staff.

# Key learning highlighted at the workshop

- An effective triage process relies on its setting. By **creating the right environment, establishing rapport** and **getting regular feedback**, staff can help clients feel able to provide relevant information and consent to sharing it.

“The workshop gave me a clear understanding of the way forward and how the One Stop Shop can assist with recording relevant information before customers are referred to the Welfare Support service.”

- In order to implement a successful triage process at B&NES, Connecting Families / Welfare Support **staff members need to be involved early in the design process** and given the **confidence to share information** by those leading the changes.

“I felt the workshop went really well and got the sign-off from all those present to move forward in the direction we need.”

- **Communicating and working with partners** – whilst not the key focus of this workshop – is still a vital component in enabling the information sharing that **underpins consistent and effective triage** to welfare support clients.

“I will re-visit partners – both external and internal – to ensure they are aware of what is available from the Welfare Support service.”

# Expectations of the day

The majority of participants' expectations were to be better informed about what triage meant and how they would be involved in the new approach. This confirmed the facilitators' initial concerns that the phrase 'triage and assessment' can be off-putting unless it is demystified and personalised. The early sessions of the workshop were designed to do this.

Two participants had specific expectations around getting claimants' consent to share information, and what types of questions support staff should be asking to triage claimants effectively.

# Triage workshop findings

## Agreed approach

By the end of the morning sessions, participants were able to articulate a clear vision for the triage process they wanted to develop at B&NES. When asked to describe what they considered to be the 'Rolls Royce' factors that would make the triage experience particularly successful, they mentioned the importance of **getting the environment right**, establishing a **good rapport with claimants** early on, and **going the extra mile** and providing little extras that made the difference (whilst ensuring that staff did what they promised they would in the first place). When asked to cut out images and words from magazines that described this approach, participants chose "The X Factor", "Heavenly", a cosy log-cabin and a bar of dark chocolate.

The group were very aware of the importance of building **continuous quality improvement** into the agreed approach. Participants identified an **effective feedback system** as crucial to improving the client experience, along with a commitment to acknowledging mistakes and putting them right quickly. Finally the group articulated strongly the importance of **integrating services** so that the client only had to tell their story once.

Interestingly, one question that this discussion threw up was "How do you gather and use data intelligently to manage a growing caseload?" This was the question at the heart of the initial proposition which B&NES wrote at the beginning of the Centre's engagement in 2014.

The group were then asked to start designing a flowchart for the agreed approach to triage, which can be found on page 7.



The mood boards were created to show the Rolls Royce of a triage experience

## Information needed for the agreed approach

The group identified the claimant's **National Insurance (NI) number** as a key piece of information that would enable them to identify their **date of birth** and **contact details**. The contact information they needed would be the claimant's postal address, previous address in B&NES if recently moved within the place, or a correspondence address if they were homeless.

Participants also felt they needed to consult the Housing Services database for **Housing Benefit** information, and the **Department of Work and Pensions (DWP) database** for employment information. These additional pieces of information would enable them to complete the security verification process for claimants.

Other questions the group wanted to ask were "Have you contacted us **previously**?" and "Do you have a **social worker** or other key-worker support?" The group realised that at this point they needed to ask claimants for their **consent to share this information** with other agencies that could support their needs.

Finally, participants suggested creating a field or flag to tick which enabled them to securely log any particular risks the claimant posed.

## Information sharing barriers and potential solutions identified

Participants identified several barriers to sharing the information identified above. These included:

- ▶ Customers can't fill out forms
- ▶ We don't have time to capture information
- ▶ People get lost in the system because front-end doesn't have enough knowledge [to help]
- ▶ The wrong people are trying to help claimants
- ▶ We don't like to say 'no' to people – so customers are not signposted correctly.

In two smaller groups, they were asked to complete a 'five whys' exercise to help them unpick one of these barriers and discover the root cause preventing the

information being shared to enable claimants to be successfully supported back to work. The groups identified the lack of a **consistent triage process** (particularly linked to the need for a secure online system for recording this information) and **insufficient staff training** respectively.

## Ideas for better partnership working

In the penultimate afternoon session, participants were asked to think about how they could reach out to key partners to make the agreed approach a reality. The group was very committed to collaborative working, as noted above. However, they acknowledged that they needed to initiate more conversations to improve triage and feedback with a wide range of agencies, including Citizen's Advice Bureau, Housing Services, Health agencies, Children's Social Care and DWP.

When asked to think about how they might bring these partners on board with the agreed approach, participants identified a senior officer's role on a **DWP-led information sharing group**, the renewal of the new **contract with Citizen's Advice Bureau**, more **links with Landlord Forums**, and a more robust **communications strategy** that would help 'sell' the Connecting Families approach and offer.

When asked what support they needed to go about this, the group suggested the need for strong local leadership to demonstrate **long-term commitment to the new approach**, and space to co-design the triage process with the **regular involvement of Welfare Support staff**.

Participants were asked to identify individual actions that they could take within the next one to three months to take these ideas forward, and the facilitators promised to email these actions back to them by the stated timescale to support implementation.

# Workshop evaluation and next steps

All participants genuinely enjoyed attending the workshop, and expectations were met, particularly in the case of a customer services officer who had been asked to attend at short notice, and wasn't sure what their role in the triage process would be.

Most participants agreed strongly that the facilitators were knowledgeable and well prepared to facilitate the sessions effectively. Participants either agreed or agreed strongly that the objective for the day had been well defined, and the topics were relevant to them.

When asked what they liked most about the workshop, participants identified the **time to discuss information sharing issues** with team members, a better understanding of how **One Stop Shop staff will be involved in the changes** and that their **input and interaction** had been encouraged

Future commitments from participants included providing **more staff training**, raising **awareness of the welfare support service**, better **communication with partners** and improving the process of **obtaining consent early**.

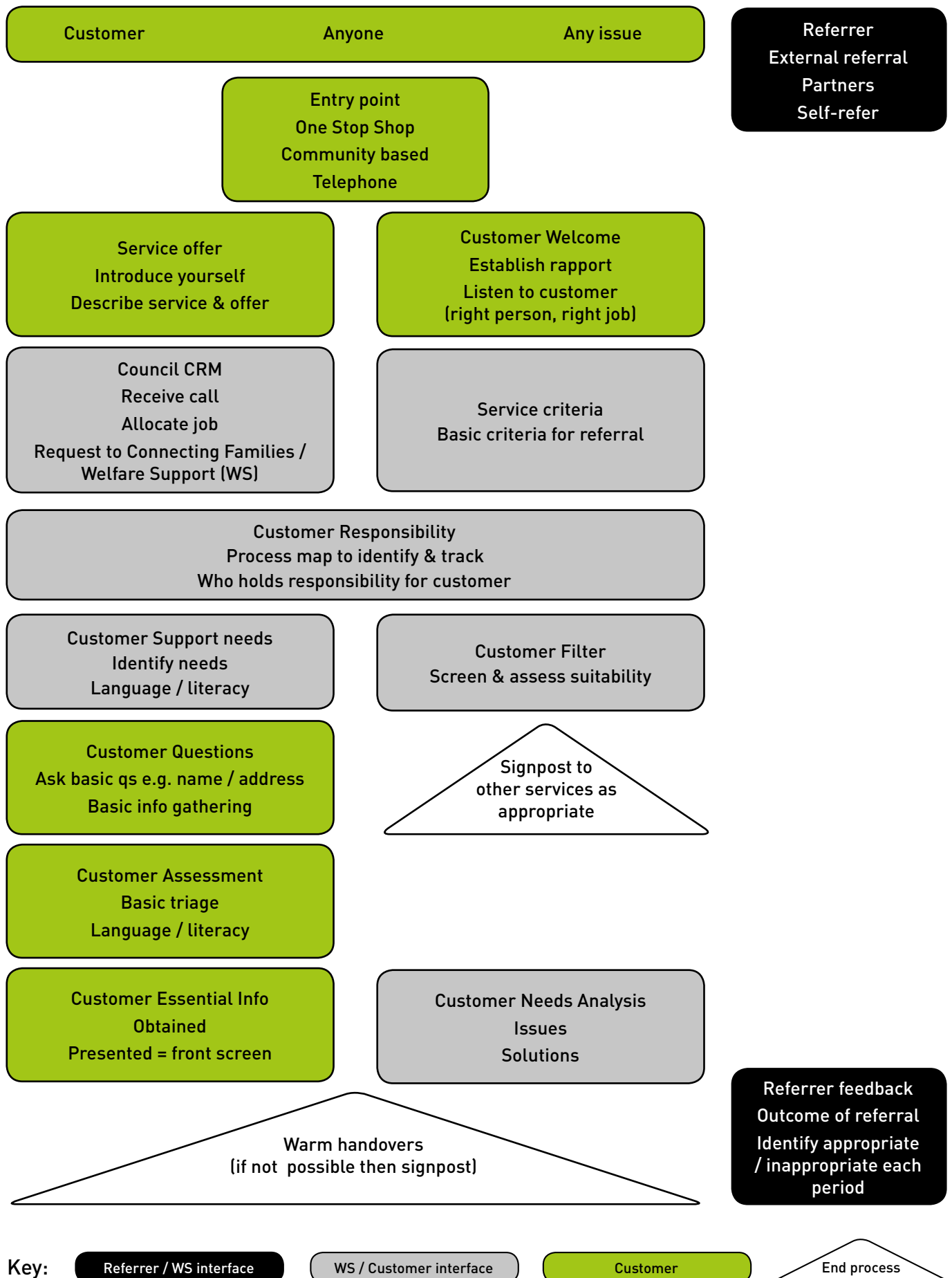
Participants were keen to attend further staff development courses that supported better triage processes, including specific courses on **information sharing** and **information governance**.

Thinking about the way forward, one participant raised a note of caution: "The devil is in the detail and more work is needed". This was a very apt conclusion as 'The devil is in the detail' was the working title of this workshop.

## Following this workshop, the Centre will:

- ▶ Stay in contact with participants and support them to complete their individual actions to implement a new triage process at B&NES
- ▶ Work with relevant senior officers to explore the possibility of running corporate information sharing sessions that meet practitioners' current needs
- ▶ Share learning about B&NES' Connecting Families and Welfare Support service with other places, so they can adopt or adapt this learning in their transformation programmes
- ▶ Continue to involve national organisations in conversations about how better information sharing processes helps B&NES to intervene early to support vulnerable families.

# Flow chart of agreed approach to triage



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