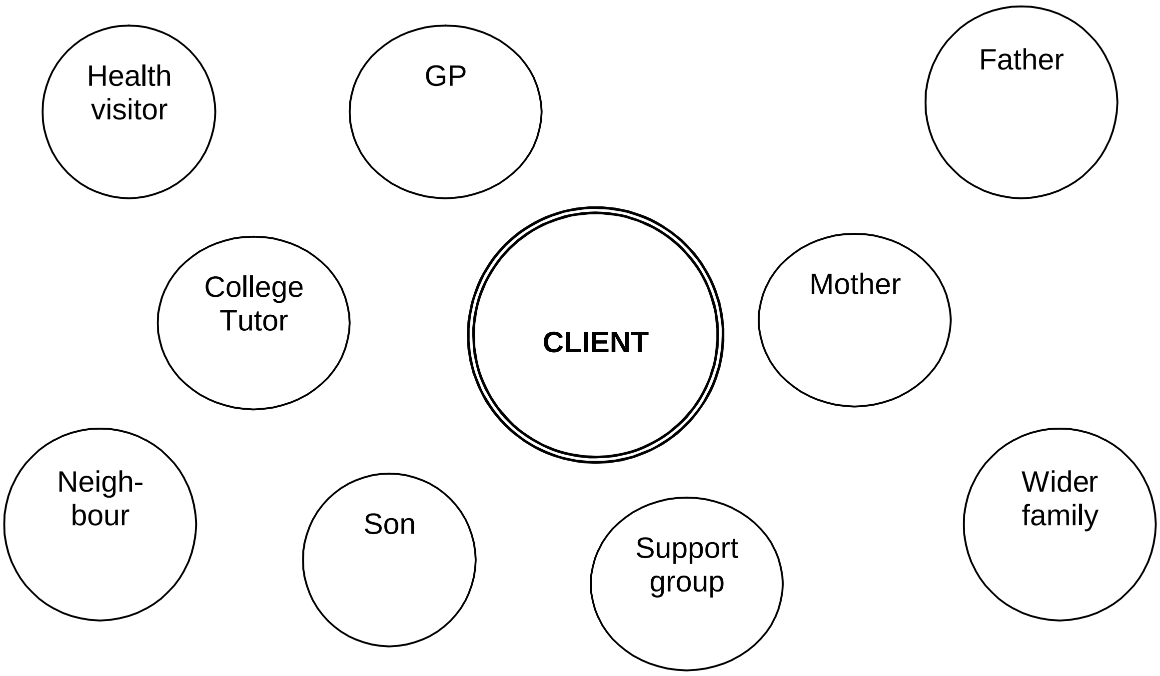
6. Tools for collaborating to meet need -
Let your clients & partners help

Finding out about what kind of approach makes your client comfortable will give you a better chance of breaking down barriers. Finding out more about their situation and they how deal with it will help. This section provides four practical ‘tools’.

1. The sociogram - to help you work out clients’ social and support networks and to gauge their vulnerability to isolation
2. The quick evaluator - for clients to see how your service can best serve them and to clarify and agree what they expect
3. Client assessment and monitoring form – giving the background to clients’ needs
4. Referral networks maps - to help build up lines of support to address clients’ needs

Tool 1. Sociograms

You can learn a lot from your clients themselves about how they might be experiencing social exclusion. An important way of learning more is to explore the personal and professional support networks a person can access. Mapping out these networks with your client can give the basis for discussion and for insight into a client’s isolation. It can also help you establish whether lines of support are actually helpful or not.



- Place the client in the central circle
- Identify important people or organisations and draw circles as needed. The circles above show an example only. You can add as many as you need/ like. Think broadly.
- Draw lines between circles where connections exist.
- Use different types of lines to indicate the nature of the link or relationship

  ——— = strong and supportive -------- = weak VVVVVVV = stressful
- Discuss the map with the client and explore how their isolation could be overcome.

Exercise 6.1: A sociogram template

The sociogram you draw up with each client will be different. However, it is useful to build up a picture in your own mind of the possibilities . From experience, you will be aware of the types of people and organisations a person may link with. When you work with clients to create their own sociogram, having a template can help you. Always bear in mind that people have had different life experiences so each sociogram will be unique.

In the space below, develop a template showing a circle for 'a fictitious client' in the middle. Place all the kinds of relationships that your clients could have with services and people, in circles around the client's cricle.

Develop this sociogram template over time, as you become aware of additional possibilities.

Exercise 6.2: A client sociogram

In this exercise, you can practice drawing up a sociogram for a particular client. You can do this as a desk exercise on your own first, thinking about a client you know well. Or, you can ask a colleague who also knows your client, to act as the client. Then do a trial run of working through the process together. Remember that a real sociogram can only be done with a client. There will be some aspects of their lives that you are not aware of.

You can build up sociograms with your clients over time, as you get to know them better.

Tool 2. The Quick Evaluator

This tool allows clients to help set the criteria for the working relationship between you, and to monitor it. It can also be used for the same reasons by staff with their line managers. It provides a quick way of:

- identifying what is needed and working out how needs can best be met
- checking clients are getting the service they need
- helping managers check the way they are supporting staff

This uses a simple format, based on 4 vertical columns - two large and two small.

How to Use the Quick Evaluator:

a) With Service Providers and Clients

Column 1: The client writes down what they want from your support/service. Also how they feel it can best be delivered. ***You may need to help some clients with this, and offer them the choice of you acting as scribe.***
Review together what they have written, at 3 stages:

1. At your first meeting or session to assess the client's needs and expectations
2. As existing needs change, or new needs arise
3. At your last meeting/session, to identify what has/not worked well.

Column 2 & 3: At the final session, initial the "yes/no" columns, for each point made in column 1. This shows if needs have been met or not.

Column 4: Note anything that may affect your ability to meet the needs identified in column 1. These may be issues in the organisation or other external factors beyond your control. You may need to add to this column during the course of the work with the client.

Column 5: The client can add any additional comments.

The Quick Evaluator involves each client in monitoring and evaluating. It can form a very useful part of your organisation' s overall evaluation strategy. All sheets need to be kept and results collated to give a full picture of your service. Staff using it need to be aware of any pre-set monitoring and evaluation targets & indicators. These could be printed onto the back.

b) For Supervision and Appraisal

The Quick Evaluator can be adapted for use between line managers and staff, as part of supervision and/or appraisal. This gives employees more power by allowing them to set some of the terms of the relationship, and by describing the support they need.

To use the Quick Evaluator for line management the headings change as follows:

- **'line-manager'** instead of '**staff member'**
- **'employee'** instead of **'client'.**
- **'Type of supervision process'** instead of **'service provided'**

The process of using the Quick Evaluator is then the same as for a).

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Quick Evaluator: Client/ Service

Client Name: …………*Mrs A*………………………. **Staff name:…………*Ms B*…………………………….**
Service provided to client:…*Health visitor drop in clinic* **.. Date service provision/ input completed *dd/mm/yy*……**

1	2	3	4	5
Client needs & expectations (list, no. & date below):	**Met?**		**Staff comments**	**Client comments**
	Yes	**No**		
EXAMPLE:				
• *I need to be signposted to parent-craft workshops that run when I'm not at work*	✓	(✓)	• *Client's work hours vary. Agreed to provide info about all courses and times within traveling distance*	• *Will be able to attend several classes in different locations, but am worried if tutors will mind*
• *I need to know that a crèche will be provided*	✓	(✓)	• *Had to hunt for info about crèches – still need to check out some venues*	• *Have some information but not sure if all venues provide a crèche*
• *I need written information about basic child illnesses and nutrition, but it needs to be in large print*	✓		• *Had to hunt for this – have now made more accessible*	• *Good information and readable*
• *My husband would be willing to attend parent craft too, but at the ante-natal classes, the chairs were really bad for his back problem, and he felt nervous about getting up to stretch all the time. Need to know about how this will be resolved.*	✓		• *Midwife tutors informed and will note for future ante natal classes*	• *Assured about availability of good seating and sympathetic tutor advised of back pain issue. Husband will go separately to this particular venue for parent craft.*
Client Signature:………………………………………………………		Staff Signature:……………………………………………………		

NB. If/as additional needs are identified, they can be added to column 1 & dated

Quick Evaluator: Client/ Service

Client Name: ………………………………………. **Staff name:……………………………………………..**

Service provided to client:………..………………………. ………….. Date service provision/ input completed……………………

1	2	3	4	5
Client needs & expectations (list, no. & date below):	**Met?**		**Staff comments**	**Client comments**
	Yes	**No**		
Client Signature:…………………………………………………….		Staff Signature:…………………………………………………….		

NB. If/as additional needs are identified, they can be added to column 1 & dated

Quick Evaluator: Employee/ line management

Employee Name: ………………………………… **Line manager name:………………………………..**

Type of supervision process ………..……………………………..………….. Date input completed……………………………….

1	2	3	4	5
Employee needs & expectations (list, no. & date below):	**Met?**		**Employee comments**	**Manager comments**
	Yes	**No**		

Employee Signature:…………………………………………………… Manager Signature:……………………………………………………

NB. If/as additional needs are identified, they can be added to column 1 & dated

Exercise 6.3: Using the Quick Evaluator

Make a copy of the Employee/ Line Management Quick Evaluator template: Use this to practice the method with your line manager on an employee/manager basis. This will help you get a feel for negotiating the relationship and how it can work. It will also help you see things from a client's position.

If you prefer, try out the Client/ Service Quick Evaluator with a client, in a situation where you will both feel comfortable.

After trying out the Quick Evaluator, make notes below about the process. Include how you feel you need to approach it next time to make it work best for you.

Tool 3. Client assessment and background form

It is very important to monitor a client's feedback. It needs to be evaluated from their perspective in the light of some basic background information. As well as informing your work with individual clients, this can also contribute to your department's monitoring of the service overall. This can help check out patterns of need, and whether some clients are being missed by your service.

Forms can be built around your services but should include some simple data to enable them to be effective. The following page gives an example.

Client Assessment Sheet

Client's name: Address:	**Urgent action required? YES NO** Telephone:
Family Situation	**Benefits Status**
Age Single/couple No. & age of children	Unemployed ☐ Lone parent ☐ Sick/disabled ☐ Pensioner ☐ Carer ☐ Low paid work ☐
Referral	**Housing Status**
Does the client require referral? Yes ☐ No ☐ Detail: If referral appropriate, what action taken? Referral Sheet given ☐ Appointment made ☐ Referred to: Other action: please specify	Owner occupier ☐ Private tenant ☐ Council tenant ☐ HA tenant ☐ With parents ☐ Homeless ☐ Other ☐
	Disabilities Please specify:
Benefits received (update as appropriate)	
Income Support ☐ Jobseeker's Allowance ☐ Disability Tax Credit ☐ Retirement Pension ☐ Widow's Pension ☐ Housing Benefit ☐ Child Benefit ☐ Working Families Tax Credit ☐ Council Tax Benefit ☐	Incapacity Benefit ☐ Statutory Sick Pay ☐ Severe Disability Allowance ☐ Disability Living Allowance ☐ Attendance Allowance ☐ Disablement Benefit ☐ Invalid Care Allowance ☐ Maternity Allowance ☐ Statutory Maternity Pay ☐

To help us monitor and improve the services we provide, we would be grateful if you would help us by selecting and ticking a heading below and then describing your ethnic identity in your own way

	✓		**Your own description:**
White		British	
		Irish	
		Other white	
		Gypsy/ Traveller group	
Mixed		White and Black Caribbean	
		White and Black African	
		White and Asian	
		Other mixed	
Asian or Asian British		Indian	
		Pakistani	
		Bangladeshi	
		Other Asian	
Black or Black British		Caribbean	
		African	
		Other Black	
Chinese		Chinese	
Other		Other ethnic group	
		Other Gypsy/Traveller group	

Tool 4. Referral networks mapping

An important aspect of reducing exclusion is helping clients to open doors to other services. In some cases, clients may not know about other sources of help at all. In others, clients may know about other organisations, but may have felt unable to make an approach. Clients may be able to tell you about different sources of support which could be helpful to others. ‘Referral networks’ are the wider support links that clients can use for help.

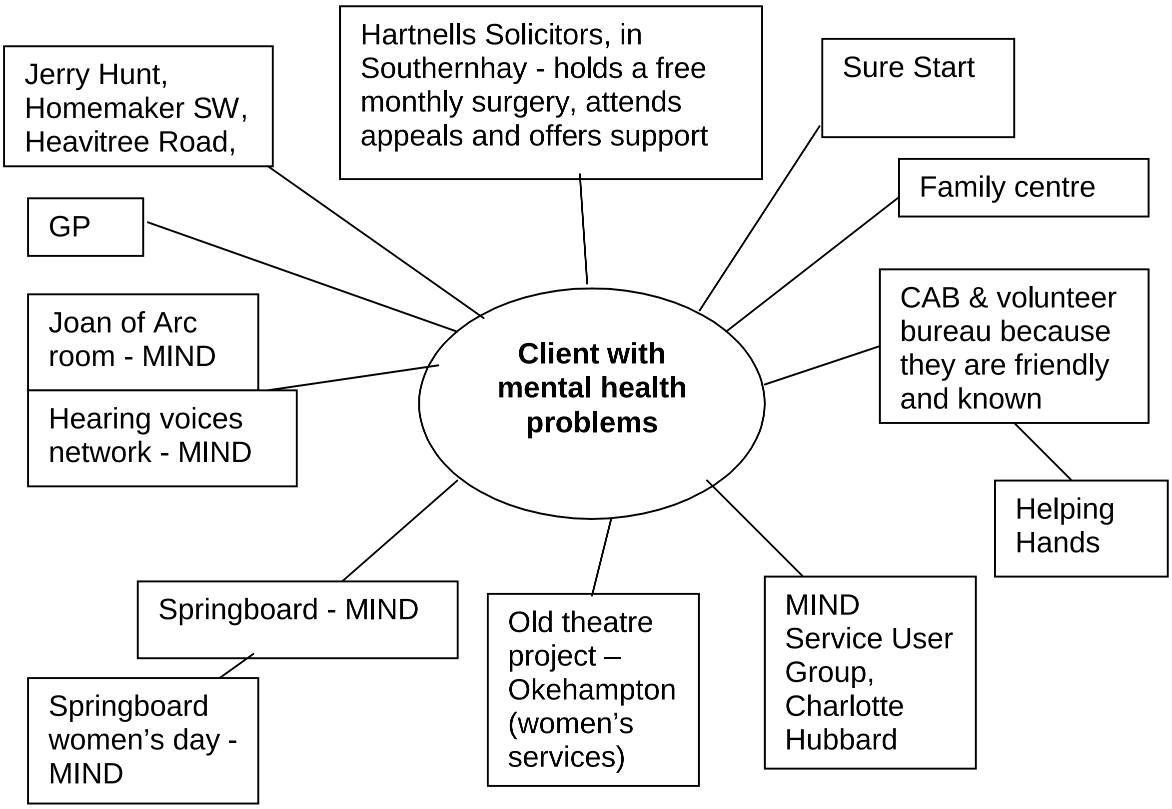
You can develop maps of referral networks with each client. Remember, social exclusion arises from a combination of linked problems. Your clients’ mind maps are unlikely to be formed solely of similar organisations around a single-issue.

You can also develop reference mind maps for client groups. These you can keep and add to as you find out about new links. You can draw information from these reference maps when developing client maps.

Exercise 6.4: Create a referral network map

In this exercise, we ask you to think of a client and draw up a mind map of external support links you could help your client access.

Have a look at the example we’ve created with the help of some of the people at MIND in Exeter below. Then create either a reference mind map or a client mind map.



Your own mind map, based on one of your clients:

Exercise 6.5: Mind map of how your organisation networks

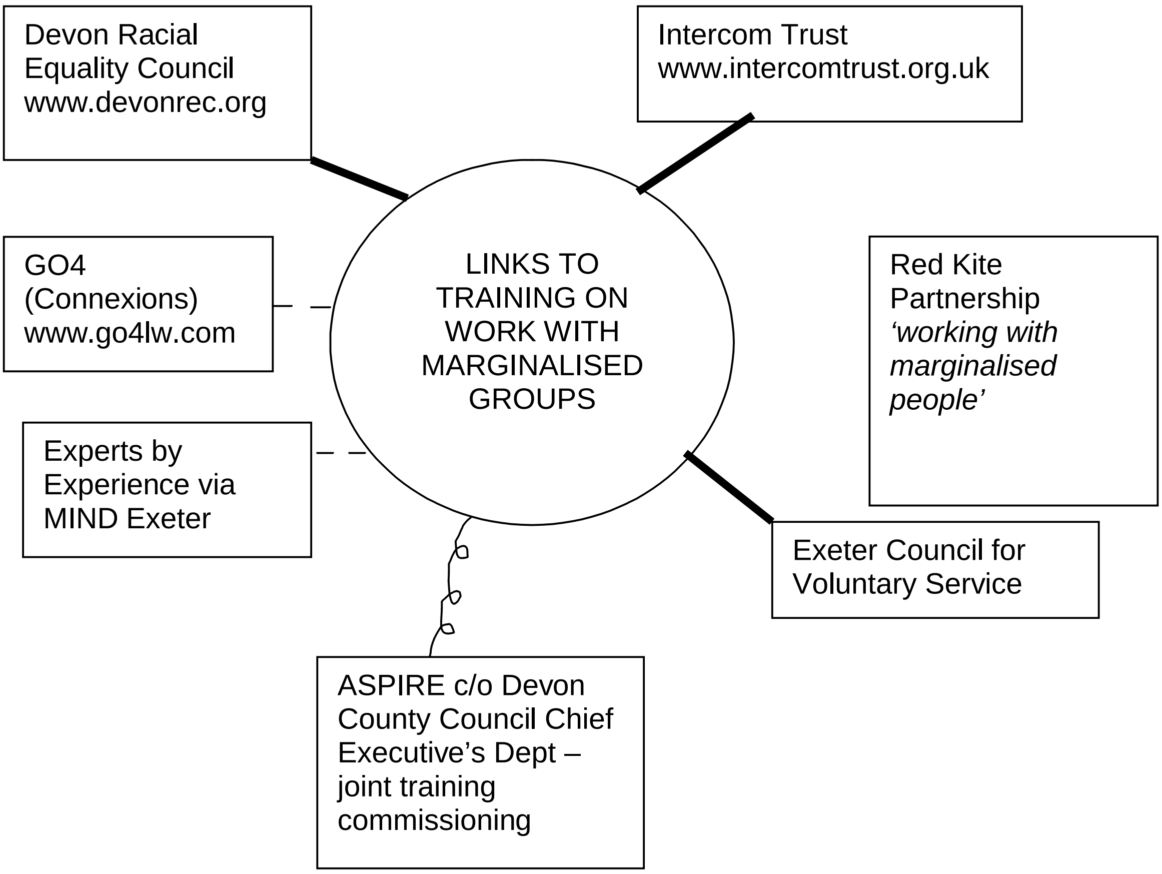
It may be that when you've looked at exercise 6.4, you've realized that your networks with external organizations are not as wide or as strong as you'd like. This exercise is about drawing together or strengthening sources of support external to your organisation .

Create your own mind map on the next page of the people, organisations, partnerships and networks outside your organisation who can work with you to address social exclusion.

- Think about who can provide you with information, training opportunities, support, advice, funding and other contacts.
- Also think about the organisations and networks that can benefit from your involvement in their work to address exclusion.
- Use different types of lines to indicate the nature of the link or relationship

———— = good strong links
-------- = weak or limited links that need strengthening
????? = new links I'd like to develop / find out about
ꝯꝯꝯꝯ = multi-agency partnerships I am involved with that need strengthening

EXAMPLE: Training co-ordinator's mind map



Create your own mind map below. Think broadly and laterally. Add to the mind map over time as you come across new sources.

When you have completed your mind map, consider the types of links you have. What action do you need to take to improve the strength of your network? Put any action-planning notes below your map. Then include them in conversations with your line manager; Use exercises 7.2 and 7.3 in **Section 7** of *Open Hearts Open Minds* to help you with this.

Action planning notes: