

GOLDEN KEY LOCAL EVALUATION

SERVICE COORDINATOR TEAM APPROACH & PRACTICE DISCUSSION PAPER

Golden Key background

“Our target clients experience a challenging mix of homelessness, long term mental health problems, dependency on drugs and/or alcohol and offending behaviour. Our aim is to find new ways to break this cycle of deprivation and dependency and create new, positive, futures for those with the most complex needs.” **John Simpson, (Independent Chair, GK Partnership Board)**

The Golden Key programme in Bristol is one of 12 initiatives across the UK funded by the Big Lottery Fund *Fulfilling Lives* programme to support improving services for people with multiple complex needs (PWMCN). The core elements of GK include:

1. A programme of **systems change** activities across the GK Partnership and citywide.
2. A team of **Service Coordinators** who engage PWMCN with services to develop a better understanding of how to support their needs effectively and improve their outcomes.
3. Activities to advance **Psychologically Informed Environments (PIE)** as a way to improve outcomes for PWMCN and other service users.
4. **Service user involvement** - including a Peer Mentoring support service for PWMCN and a group of experts by experience (the IF Group) who represent the voice of the service user to shape the strategic direction and practices of GK.
5. **Improving PWMCN’s experience of assessments** to access services.
6. **Innovation pilots**

Why have we produced a discussion paper?

This discussion paper is designed by the UWE Local Evaluation Team as a tool to stimulate discussion and engage stakeholders with some of the main themes and questions arising from our interviews with all members of the GK Service Coordinator Team. This approach aims to facilitate collaborative sense-making and support the evaluation in contributing to GK’s learning, particularly for key stakeholders closest to the programme.

This discussion paper focuses on the Service Coordinator Team and client practice. Further findings from these interviews with the Service Coordinator Team, relating to the wider program outcomes, are included in the Golden Key Local Evaluation Phase 2 Report.

About the research

13 semi-structured, in depth interviews of around 60-90 minutes were conducted by the UWE Local Evaluation Team with all members and direct management of the Service Coordinator Team between late September and early November 2016.

The interviews themes included: (1) experiences joining the team and motivations in the role, (2) activities providing operational support for clients, (3) values and principles guiding practice with clients, (4) training and personal development, (5) learning about specialist groups, (6) service user involvement, (7) secondment experiences, (8) experiences managing small personal budgets, (9) systems change, and (10) data collection and monitoring.

Following preliminary analysis of this research, we facilitated a half day workshop with the Service Coordinator Team in January 2017 to explore emerging themes from the research interviews.

Summary of key findings: Service Coordinator Team approach and practice

1. **The Service Coordinator Team (SCT) bring considerable skills and expertise to the role, which supports their effective practice as a high-performing and engaged team with a deeply embedded culture of learning.**
2. **SCT members report feeling well supported in their roles through flexible and responsive management, psychologically informed support and informal support.** The Team Manager and Psychologist provide fundamental and valued guidance in shaping the Service Coordinator's approach into practice. Members of the team enjoy being consulted frequently in decision-making, leading to their significant engagement with the development and operations of the team.
3. **Whilst passionate about their role and environment, several Service Coordinators are unsure about career progression pathways within GK** and a number have pursued career development opportunities elsewhere in the sector.
4. **The GK Service Coordinator approach is characterised by developing a genuine trusting relationship with clients,** being client-led, non-judgemental, working holistically, providing consistent reliable personal and emotional support and building a psychologically informed understanding of client needs.
5. **There are some practical challenges to the provision of consistent support to GK clients.** This is linked not only to staff absences and departures in the SCT but also the unpredictable and changing nature of client needs. The nature and size of caseloads varies, with many Service Coordinators reporting that their workload is challenging to manage, and several feeling overwhelmed at times.
6. **The availability of small personal budgets is considered valuable by Service Coordinators in engaging clients to move forwards.** However, in some situations Service Coordinators found them challenging to operate due to practical and ethical concerns around managing client expectations.
7. **Maintaining traditional approaches to 'professional boundaries' and managing dependency is challenging at times, though this is less concerning to Service Coordinators due to the long term nature of GK's support.** The role is incredibly varied due to the holistic support that includes intense practical, personal and emotional support covering all areas of a client's life.
8. **Service Coordinators conceived of their client work falling into two main categories: 'Support work' and 'Co-ordination'.** However, their role in practice seemed much more holistic and this conception was not fully reflected in how Service Coordinators described the activities that are considered appropriate as client's progress.
9. **Service Coordinators are achieving some 'flex' in services for their individual clients.** Gaining this flexible response from services relies on a good understanding of the client's needs, strong partnership engagement and commitment to GK, and building good relationships with other service professionals.

About the GK Service Coordinator Team

Team profile & ethos

All individuals within the Service Coordinator Team (SCT) bring a vast range and depth of relevant expertise to their work, which supports their effective practice and operation as a high-performing and engaged team.

Many had prior experience of working with multiple complex needs and how services struggled to support these particular service users. This fuelled their particular attraction to being able to work differently with clients and the passion they felt for the systems change element of the role.

Service Coordinators reflected a deeply embedded culture of learning throughout the interviews, across a range of topics. Most members enjoyed being consulted in decision-making and creating change together within the team. This was particularly evident in some of the positive comments about the team manager, the team structures (e.g. team meetings, working groups) and other initiatives such as the client coffee morning.

“I’ve worked in lots of teams, nice people like fluffy places but there’s something about like the set-up of this team that just feels like it’s different, it’s really kind of considered and always changing as well... it’s a very dynamic team but that’s really nice and I feel like we’re kind of brought in on all the different like decisions.” **GK SERVICE COORDINATOR**

Several Service Coordinators reflected that in some particular areas where many other services are commonly challenged, such as resourcing and recruitment, they felt that there was further potential to explore creative and alternative approaches within GK.

Staff support & development

Overall Service Coordinators felt they were well supported in their roles and the range of support, both informal and formal was valued extremely highly. The specific time allowed for peer supervision sessions and the respect developed for colleague’s perspectives gained during these sessions played an important role in developing good relationships, which were considered the foundation of positive informal support. The Team Manager and Psychologist were both highly respected within the team, with the ‘open door nature’ of their support being particularly appreciated.

Whilst all Service Coordinators recognised the importance and value given to supervision and reflective practice some found it difficult to prioritise these sessions whilst “firefighting” for clients.

Once established in the role, the personal development of Service Coordinators has tended to be managed through a focus on supervision, reflection, internal team workshops, and supporting self-directed learning (which may include attending specialised training) rather than formal team-wide training. Team members were encouraged to share skills and learning that they gained through external training (self-directed or via secondments) within the team.

Whilst passionate about their current role and the environment working in the team, most Service Coordinators struggled to see a clear and compelling development pathway for their career at GK, with career pathways tending to be seen in hierarchical terms.

Caseloads

The nature (both in terms of levels of support for clients and their engagement) and size of caseloads varied widely between Service Coordinators and over time. The fluctuating nature of client needs required skilful and sensitive juggling, with some ‘time flexibility’ viewed as essential when dealing with clients with chaotic lives. Some variation also related to the particular specialties of Service Coordinators and the nature of the support that corresponding specialist services offered (e.g. for women or young people). Several Service Coordinators mentioned feeling like some clients on their caseload had a lower threshold of need than other ‘typical’ multiple and complex needs (MCN) clients.

Whilst several Service Coordinators found their caseloads manageable, most felt the volume of their caseload was somewhat challenging to manage in the available time and several reported feeling overwhelmed at times. These individuals particularly identified the challenges of fitting internal admin and the coordination of services around chaotic client support. In such cases Service Coordinators felt their emotional capacity and ability to take a ‘step back’ was sometimes affected. Several also expressed anxiety about how their clients and colleagues would be affected if they left GK.

“It’s challenging, I quite often check in with my manager or with my other team members if I’m feeling quite overwhelmed by the work load... beginning of the end of weeks are hard because people have crisis around weekends ... I do way more hours than I should do every week.” GK SERVICE COORDINATOR

Most Service Coordinators expressed a desire to have more time to dedicate to activities such as (i) proactive or creative approaches to client work, (ii) engaging non-engaged clients, (iii) building relationships with clients who were less accessible or demanding (e.g. in prison, out of the area) and, (iv) to focus on systems change activity.

“It’s been really good doing the system change stuff ... that keeps me kind of grounded in the programme side of it rather than the client facing side of it... sometimes you can’t see the wood for the trees, sometimes when someone’s been on the phone a lot in one day, sometimes it’s hard to just find the time even to step back and see the wider picture.” GK SERVICE COORDINATOR

Understanding the Service Coordinator’s role

Conception of the Service Coordinator role

The overriding objectives that were understood for the role included: helping clients move forwards, joining up / coordinating services, supporting clients to engage with services and services with clients, systems change, research (collecting data on client’s experience of services), and advocating for clients with services.

Service Coordinators all described their role as being hugely varied and this was reflected in the many different activities they described. It was also apparent that the role demands investment of considerable ‘emotional labour’. Service Coordinators employ an incredibly varied and well-developed skillset in their client work, for example: *patience, compassion, emotional intelligence, empathy, tenacity, perseverance, tolerance, organisation, multi-tasking, time management, interpersonal skills, knowledge of services, communication, influencing, negotiation, resourcefulness, creative thinking...*

Nearly all Service Coordinators conceived of their client work falling into two main categories:

1. **Support work:** Personal support, crisis management, filling gaps between/in services and client’s social support networks.
2. **Co-ordination:** Facilitating and coordinating access to the right services to get client’s changing needs met.

Most Service Coordinators envisioned that generally a client would require ‘*Support work*’ at the start of their GK journey but then as they progressed, there would be a move towards more ‘*Co-ordination*’ activities.

Many Service Coordinators reflected that they considered the support work less desirable and the coordination activity more desirable. However, this view was not fully reflected in how Service Coordinators described the activities that are considered appropriate as clients progressed. For example, ‘*Support work*’ may include personal emotional support, or meeting immediate basic needs such as buying dry/functional clothes but also extended to areas of fulfilment such as developing coping strategies for anger management, aspirations, and life planning. Equally, ‘*Coordination*’ can involve basic elements such as logistically supporting clients to attend appointments but also extends to highly complex coordination, navigation and project management of multiple services.

Service Coordinators provide personal & professional support

Service Coordinators all described their role as being hugely varied due to the holistic support that can cover all areas of client’s life, sometimes requiring both intense personal and emotional support. It was apparent that the role demands investment of considerable ‘emotional labour’. Maintaining professional boundaries and managing dependency were sometimes areas found to be challenging and there were some differences of opinion amongst team members on how this tension should be approached.

Dependency was also concern for some Service Coordinators but this tended to be countered by their knowledge that GK was a long term programme. Several Service Coordinators were aware that this was something that needed consideration in future years given the finite nature of GK.

“I’ve got two or three people who I think are more reliant on me at the moment than I would like to be longer term... I’m struggling to move them forward, so I’m trying to build their relationships with other people [service workers] but maybe other people don’t have the luxury of the time and

flexibility that I've had and the kind of support, psychological support." **GK SERVICE COORDINATOR**

The dynamic nature of the Service Coordinator's role

Service Coordinators who had been in the team for over a year mentioned how the role had changed over time and variations between clients was also highlighted. The changing nature of support was attributed to:

- Refining the 'GK approach' with clients and services over time.
- The team's reduced focus on engagement activity as GK partner's awareness and understanding grew.
- Increasing caseloads (as clients became engaged) resulting in less available time per client.
- Client's progression leading to reduced need for support.
- Access to partner agency's support for the client (e.g. some clients such as care leavers could access more holistic personal support from other services).

Some Service Coordinators found it challenging to manage client's expectations of their role given these changes over time, combined with their responsive changes in support as the client progressed.

Understanding the Service Coordinator's approach to client work

Approach to initial engagement with clients

The following were considered priority activities by Service Coordinators during the initial engagement process:

- Getting to know the client – investing time and energy to build trust, to understand the client's character and needs.
- Supporting clients to decide what they would like to work on and the pace of the support.
- Understanding the existing landscape of previous and current service engagement (through the client, the referring service worker, and other professionals).
- Managing client's expectations of what they can expect from Golden Key – programme features and the nature of support.
- Understanding any risks to working with the client.
- Gaining consent from the client to working with GK and contacting other named services on behalf of the client whilst avoiding too much paperwork.

Initial engagement often requires great patience and perseverance and subsequent breakthroughs by Service Coordinators in engaging clients were described with pride as accomplishments in their professional role. Most Service Coordinators had a number of clients on their caseload who were not actively engaged with GK for various reasons and available time

was raised as one barrier to developing engagement with some clients (e.g. those out of the area, out of contact, in prison, etc.).

Approach to working with clients

A number of highly consistent themes emerged from discussions with Service Coordinators about their approach to working with clients and descriptions of particular client cases. These themes are in line with the anticipated approach set out in the original business plan and the team has developed a greater understanding of these through their working practice. The main themes that emerged are as follows:

- Developing a trusting relationship with clients – being seen to be ‘genuine’.
- Client led - client leads at client’s pace, focus on what client needs (not what service needs, assessments/ targets), flexible support adjusted to meet client’s needs.
- Non-judgemental and accepting of setbacks (e.g. understanding everyone is doing the best they can, given their circumstances).
- Holistic – across services and the client’s personal, practical and emotional needs.
- Consistent/reliable support (not letting client down).
- Psychologically informed (valuing clinical supervision and other previous experience).
- Learning approach.

The Team Manager and Psychologist provide fundamental guidance in shaping the Service Coordinator’s approach into practice. Whilst the above principles were quite clearly evidenced from Service Coordinator’s discussing their client work, these were not as clearly articulated when Service Coordinators were asked about their philosophy or underlying/guiding principles around client practice.

There are some practical challenges to the provision of consistent support, which must be considered as a potential risk to the client relationship given its centrality to the GK approach. Primarily this concerns people leaving the team but we must also consider whether available time and the changing nature of support may also have an unintended impact on the client relationship.

Service Coordinator’s navigation and coordination of services

When Service Coordinators described their day-to-day work to engage clients with services (and vice versa) they described how this often creates some flexibility or ‘flexing’ of services for individual clients.

“I have pretty good relationships with pretty much all of them [service workers] I work with I think, we have the odd disagreement, well we do have disagreements but we can talk about it, there’s no shut doors on those conversations.” **GK SERVICE COORDINATOR**

Some underlying factors identified by Service Coordinators that supported this activity were:

- Strong partnership involvement and GK activity to build awareness and engagement (pre-launch and ongoing).
- Services taking GK and their clients seriously with professionals often making an extra effort to support GK.
- Service Coordinators building networks of strong relationships through working with individual professionals and the team’s secondments.
- Service Coordinators having a good understanding of individual client’s needs.

Some identified mechanisms through which Service Coordinators achieve flex in the system included:

- Service Coordinators maintaining dialogue with other professionals about individual clients. Keeping services updated can mean that other professionals can understand the importance of an opportunity for support and the implications of missing it.
- The existence of the Service Coordinator role can change other professional’s expectations of client’s behaviour and expected outcomes, this gives services greater confidence to take risks in supporting a client that might otherwise be avoided.
- Using an understanding of both the client and services to advocate and negotiate with services on behalf of the client.

Some examples from Service Coordinators are outlined below.

“For one client it was getting to a point of being able to talk to the mental health services and letting him tell his story... what he’s been saying is ‘I don’t have schizophrenia, I don’t have this problem’ but what they were listening to was, ‘I don’t have any problem’... now they’re going to change his diagnosis from schizophrenia to bi-polar so next time they’re not going to prescribe him and overdose him on medication when he doesn’t really need it.” **GK SERVICE COORDINATOR**

“I’ve got a guy who’s in a hostel, he came from rough sleeping for about a year... he should have been there for 9 months, he’s been there for 13 months so I’ve been going to his key worker and developing a relationship with them... and then working with them to present to the manager about can you keep this guy a bit longer... you know we really want this to be sustainable for this person otherwise you’re just going to see them back again in 9 months and you don’t want that... the worker has said it’s made them think a little bit more about some other clients they’ve got.” **GK SERVICE COORDINATOR**

Service Coordinator’s described their experiences with GK partners that informed their belief that other service professionals are more aware and engaged with GK because they have seen the benefits of the Service Coordinator role for clients and themselves.

Personal budgets

Use of personal budgets

Service Coordinators gave a range of examples of how clients had used their personal budgets. The benefits described (as follows) were few in number but are significant in leveraging the client's progress.

- Some clients have used their personal budget to change their lives significantly for the better (e.g. driving lessons, courses, connections with family)
- Can be a powerful engagement tool and support development of a trusting relationship with the SC
- Supports meeting basic (but important!) practical needs that are a barrier to client's progression

Service Coordinator's challenges & concerns

Whilst all Service Coordinators acknowledged the benefits of personal budgets, they also found them challenging to manage due to a range of practical and ethical concerns:

- Internally time consuming to administrate
- Managing client's expectations around how it is spent (e.g. saying you can't have food but you can have a phone), especially when the situation is constantly shifting (items that are permissible in some situations are not in others).
- Managing personal opinions or client's choice of spending and feeling accountable if the item does not lead to successful outcomes.
- Some clients are extremely demanding if they know the availability/amount of money (especially clients with learning difficulties or severe addictions).
- Other GK stakeholders challenge their spending choices without understanding context.
- The money can change the dynamic and power of the relationship with the client and sometimes feels like buying trust.
- A concern that timescales may not meet client expectations and future needs

Feedback and discussion welcomed!

We welcome feedback on this discussion paper and would be pleased to hear about any discussions or questions that the paper stimulates.

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