

## Action Card

Card number	006
Project	Quantitative Data Survey – Case Officer
As a	Group of parent carers who are experiencing significant challenges with case officer communication. (Based on previous feedback and 500 responses to our survey)
We want	<p>Following the outcomes of the quantitative data survey we have established 5 key recommendations.</p> <p><b>Recommendation 1: Case officer leaver process</b></p> <p>To have a standard communication process for when a case officer leaves the LA or goes on long term leave; such as maternity, long term sick or moves to a new role.</p> <ul style="list-style-type: none"> <li>- Case officer (or line manager if applicable) to email all their parent carers and schools in advance of leaving, to inform them of the date they are leaving and to detail who will be taking over, and who to contact. This information should also be added to their out of office email.</li> <li>- Senior case managers should have a review/monitoring process whereby they check that this has been actioned.</li> </ul> <p><b>Recommendation 2: Introductions of new case officers</b></p> <p>To have a standard template that is used to communicate with parent carers and schools when a case officer takes over a case. This should be sent out within the first week of taking over a case. This should include:</p> <ul style="list-style-type: none"> <li>- How to contact them</li> <li>- An introduction of who they are</li> <li>- Senior case managers should have a process whereby they check that this has been actioned.</li> </ul> <p><b>Recommendation 3: Induction Training</b></p> <p>Parent carers and young people are involved in designing the induction training for new case officers, this could include:</p> <ul style="list-style-type: none"> <li>- Videos by parent carers and young people</li> <li>- Training from lived experience</li> <li>- Training on topics that parent carers feel are important and a vital part of the role.</li> </ul>

#### **Recommendation 4: Review of processes**

Family Voice Surrey to be involved in a case officers/senior case managers 6 monthly learning review process.

- This will ascertain what is working well and areas for improvement. (Like the Invision audits)
- This would highlight training needs, challenges families are facing and early identification of any barriers to collaborative communication.
- This should include 360 feedback forms sent out to parent carers.

#### **Recommendation 5: Case Officer retention**

Turnover of case officers is extremely high and is negatively impacting families as a result.

- Work with Family Voice Surrey to analyze and understand the root causes.
- Review the exit interview process to understand what is driving the poor retention.
- Develop a retention strategy

Undertake a review of the role by consulting:

- Case officers
- Parent carers
- Young people
- Other professionals

Using the findings to develop and future proof the role.

#### **Recommendation 6: Transparency of Communication**

Parent carers will be copied in on correspondence related to their child in line with The Freedom of Information Act, to avoid inaccuracies being recorded and to ensure transparency.

Revisit Action Card dated April 2022 initiated by Benedicte Symcox (Former Family Voice Surrey CEO) and Julia Katherine to reflect the delay in implementing the EYES system and what actions can be taken in the interim.

Discussions and agreement to take place in respect of GDPR and safeguarding processes.

So that	Parent carers will know who their case officer is and can communicate effectively and efficiently. This will improve parent carer mental health, avoid unnecessary delays and improve the outcomes for children and young people. It will also support the labour turnover and job satisfaction of case officers. The process will be reviewed regularly to restore confidence, ensure effectiveness and establish learning that can be acted on.
Allocated to	Leanne Henderson and Kate Goode
Accepted by	<b>Julia Katherine and Tracey Sanders</b>
Outcome measure	
Date Received	May 2023
Dates of updates	Please provide an initial response by the 24 <sup>th</sup> May 2023 and then quarterly updates.
Date Closed	