

SAP Assessment Exercise 1

What is assessment?

Definition A

Assessment is a process whereby the actual or potential needs of an individual and related matters are identified, and their impact on independence, daily functioning and quality of life is evaluated, so that appropriate action can be planned. (SAP Guidance)

Definition B

A process whereby the needs of an individual are identified and their impact on daily living and quality of life are evaluated.
(Discharge from Hospital: pathway, process and practice DOH 2003)

Definition C

Assessment is a comprehensive process that identifies and individual's holistic car based on their potentials whilst considering appropriate risk factors.
(AGW SHA 2003)

Definition D

Assessment is an ongoing process, in which the client participates, whose purpose is to understand people in relation to their environment; it is a basis for planning what needs to be done to maintain, improve or bring about change in the person, the environment or both
(Coulshed and Orme 1998:21)

Definition E

Assessment is the mechanism and process by which an individual's needs are identified
(DOH Guidance for Care Management 1998)

EXERCISE 3

assessment processes

Aim

To ensure everyone is clear about the current level of overlap in processes. This can be looked at in relation to joint working or in relation to the single assessment process.

Time

45 minutes

You will need

Flipchart paper and marker pens
BluTack
Walls where information can be attached

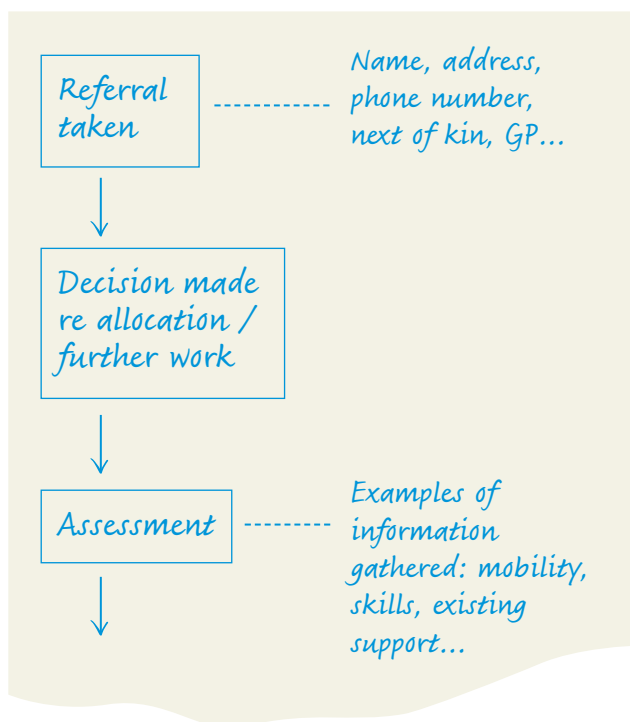
The activity

- 1 Organise people into groups within their own agencies. They need to be working in the same system so, for example, if occupational therapists and social workers use separate intake/duty systems you need to ensure they are in separate groups.
- 2 Give each group a piece of flipchart paper. Make it clear that the information they record will be shared with the wider group (both so they are aware of this, and so it is legible).
- 3 Ask each group to take 10 minutes to draw a simple flow chart of the process a service user or patient goes through from first contact to end of assessment. Ask them to do this down the left-hand side of the paper.

- 4 Then ask each group to take 15 minutes to list the information gained at each stage on the right-hand side.

This is not a full process mapping exercise so it doesn't have to be perfect, and timescales are not important – people just need to get the essentials down.

Here is an example:



- 5 Ask the groups to stick up their sheets and give them 10 minutes to look at each other's flow charts with the focus on identifying areas of similarity and areas of difference.
- 6 Bring them back into the large group and do a quick plenary yourself, recording on a flipchart areas of common ground and areas where there are no overlaps.

EXERCISE 4

what makes a good assessment?

Aim

To develop a shared understanding of the principles of a 'good' assessment, focusing on assessments which can be shared across agencies, and are person-centred.

Time

30 minutes for the activity

10–15 minutes for feedback, depending on the number of groups

You will need

Flipchart paper and marker pens for each group

The activity

- 1 Organise participants into groups of four to six. These should be mixed groups with staff from different agencies and professional backgrounds.
- 2 Provide each group with a facilitator or ask them to nominate a leader and a scribe.
- 3 Ask the groups to answer the question 'What makes a good assessment?', recording as many thoughts as they have. They should not get into too much detail (such as what information is collected) but look at the broad issues (whether assessments are person-centred, etc). Explain that they will be asked to feed back to the whole group later.

Some issues to start people thinking:

- The use of jargon
 - Putting the older person at the centre of the assessment (what does this mean?)
 - How will people from another agency or background know what you mean and what areas you have covered?
- 4 After 30 minutes stop and take feedback from the groups.

EXERCISE 5

getting to know you

Aim

To improve understanding of the older person's view of assessment

Time

15 minutes

You will need

A4 paper and pens
Flipchart and marker pens

The activity

1 Ask participants to imagine they are an older person who has had increasing difficulty preparing meals because of arthritis in their hands. They are expecting someone to call to discuss the problems they are facing. In role as the older person they should consider the following questions (it may help to put them up on the wall):

What information do you want?

What do you expect from this assessment?

2 Ask them to take a few minutes on their own to consider questions, jotting down some ideas. Then ask them to join with three other people to share their ideas and begin to build a composite list, recording it in a written note or on flipchart paper.

3 Next you could address each of these two questions and begin to record the groups' responses on a flipchart.

Alternatively you could ask one a group to present their findings by referring to their previous notes. Other groups can then add or enlarge upon the presentation.

4 The expected responses are noted below, and you should raise any of these issues which do not come up during discussion.

Responses to 'What information do you want?'

- Who is the assessor?
- What agency do they work for?
- What do they do?
- What kind of help can they offer?

- What information do they want?
- What happens to this information?
- Is it written down, or stored on a computer?
- Who can have access to this information?
- Can I see this information?
- What is EASY-Care?
- What is the point in answering all these questions?

Responses to 'What do I expect from this person?'

I expect the assessor to:

- be friendly, interested and to listen to me
- take time and work at a pace to suit me
- offer me choices
- sort things out for me
- be knowledgeable
- be honest with me
- give me key decisions and issues in writing or in another appropriate format
- write down what I say at the time (I am worried they will forget otherwise).

EXERCISE 7

creating case studies

If time allows, trainers may opt to involve groups in creating their own case study. The group can then test out the **contact**, **overview** and **specialist (in-depth)** stages of the single assessment process on a composite service user, drawn from their own experiences.

Stage 1 Describing the imaginary service user

It is best to conduct this exercise as a quick fire round at the start of a training session. Use prompts to get the group to describe this fictitious patient.

For example:

Is this a man or a woman?

How old is s/he?

Is this person white British?

Where does s/he live?

Has s/he had medical treatment recently?

Does s/he get out and about?

Does s/he have family who visit?

Who is requesting an assessment?

Do not go into too much detail.

Record suggestions from the floor as key facts on a flipchart, as they come up. Use them as reference points for the next stage.

Encourage all members of the group to volunteer one of the

basic facts. A mixed group of professionals will yield a richer history and background, while hopefully still being grounded in reality.

In a recent session, this type of exercise resulted in the following service users' biographies:

Sally Ann Porter

86 years old

Has short-term memory loss

Doesn't have a phone

Lives alone, in a rural location

Recently bereaved

Has a hip screw and walks with a frame

Shopping is a problem

Can no longer drive

Doesn't have a social life

Owens a number of pets

Neighbour is concerned

Sydney Andrew Parker

94 years old

Lives in sheltered accommodation

Warden is concerned

Has poor eyesight

Has had a fall (?Alcohol)

Warden thinks poor self-care; flat 'smelly'

Daughter thinks it's time Dad was in a home

Stage 2 Role play

Having devised their own case, the group can then split into smaller groups in which one person acts in role as the service user and the others play out the roles of the assessor and other parties (e.g. the neighbour).

The person in role as the service user can elaborate on the individual's history and needs using the basic details agreed.

Approaching a case study from this viewpoint can be a lively way to get people to start thinking in a person-centred way. It can also be fun, acting as a good ice breaker and helping everyone to speak from the outset.