

PROCEDURES FOR ADVICE LINE, ADULT COUNSELLING, TELEPHONE COUNSELLING AND OUTREACH SERVICES

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1 These procedures arise from

The Adoption Support Agencies (England) and Adoption Agencies (Miscellaneous Amendments) Regulations 2005, Regulations 13, 15 and the National Minimum Standards for Adoption, NMS 15

2 Aims and Objectives

- 2.1 The purpose of this document is to outline the procedures relating to PAC's provision of the:
- Advice Line and Adult Counselling Service
 - Outreach Counselling Service
 - Telephone Counselling (including Skype)

3 Staffing

- 3.1 All counselling staff must have the minimum professional qualifications outlined in PAC's Overarching Policies and Procedures and National Minimum Standards for Adoption Standard 23. Newly appointed counsellors are required to undergo a full induction programme. For Advice Line Counsellors, this will include sitting in with an experienced counsellor during Advice Line hours. New Outreach Counsellors will be paired with an experienced PAC counsellor for work in outreach surgeries.
- 3.2 Volunteer Placement Counsellors who are fully trained, qualified and have specialist adoption experience with all parties to adoption/permanency may be appointed to Outreach surgeries to co-work with experienced Outreach Counsellors.
- 3.3 All PAC counsellors and volunteers are required to have enhanced DBS checks, updated every 3 years to ensure their suitability for work with children and vulnerable adults (Standard 21).
- 3.4 Where counselling staff have personal experience of adoption which, while generally enhancing their knowledge and practice, through counter-transference may sometimes raise painful issues for themselves, both the counsellor and line management need to be alert to this possibility and create a structure to support their work in a sensitive way. This may include, in addition to supervision, the counsellor seeking appropriate therapy for her/himself.

- 3.5 All PAC Advice Line and Outreach Counsellors will be supported with regular individual/group supervision from their line manager or other appropriately qualified and experienced adoption counsellor. Group supervision will be provided at least six times a year; individual supervision will be provided every four weeks for full-time workers, every six weeks for part-time permanent staff, and a minimum of every 8 – 10 weeks for sessional workers and volunteers, to be agreed with PAC management. It is the responsibility of both supervisor and supervisee to ensure that regular supervision does take place, as contracted. Permanent and sessional staff must attend group supervision a minimum of three times a year.
- 3.6 Informal supervision conducted either face to face or by telephone outside of those formally arranged by PAC is encouraged, if needed, to supplement scheduled supervisions. Important decisions emerging from informal discussion should be documented.

4 Assessment of need for adoption support

- 4.1 Eligibility for services: In order to comply with Regulation 13 (2005), PAC staff will ensure that all adoption support is based on a formal assessment of need carried out either by the local authority* or a PAC counsellor, having taken into account the following:
- a need for any particular assistance to enable them to access our counselling service, i.e., disability access, interpreter service, etc.
 - the client's mental capacity to engage in adoption counselling; if the service user is severely mentally incapacitated, the counsellor would signpost her/him elsewhere
 - any issues of welfare and safety that might arise would be fully discussed
 - funding provisions.

* Prospective service users must be made aware that they may be entitled to request an assessment of their needs for adoption support services from their local authority in accordance with the Adoption and Children Act 2002 and associated regulations.

- Before accepting a telephone referral, the Advice Line Counsellor will, firstly, check that the client can either pay for the service independently or is from a local authority that
 - has commissioned face-to-face counselling services either at PAC's main premises or at a local outreach surgery;
 - will pay for the service as a 'spot purchase'.

- 4.2 Those service users who do not live in an authority which has commissioned counselling services may still receive advice during Advice Line hours. (See PAC Subscribers' list and Schedule of Service Level Provision). They may also purchase a

telephone/or face to face advice and support service outside of the Advice Line Service hours.

- 4.3 The 'green' intake form needs to be completed as fully as possible during the initial telephone enquiry or referral, including the chargeable Local Authority, even if the caller is from a non-subscribing authority. The 'green' intake form should be completed online and a new ID number raised by the Advice Line Worker. This form should indicate whether the client has cultural or other needs that may require additional resources or special consideration by the subscribing authority, before PAC services are offered.
- 4.4 The Advice Line Worker will place the completed 'green' form in the Advice Line in-tray for management allocation or in the pending tray if work is still required by an Advice Line Worker. The contact must be entered into the Advice Line Log book.
- 4.5 The team managers of the Child and Family Service are responsible for the allocation of new cases to their team members, usually after discussion at team meetings. If there is a waiting list for allocation, a letter will be sent by the manager of that service to the client within 7 working days to explain this (see PAC Policy and Procedures for Child and Family Service).
- 4.6 All calls and referrals including via email are entered by the Advice Line Worker in the Log book to await review and/or allocation by the Head of Adult Services, who will record the decision in the Log Book. Outreach surgery appointments can usually be made via the Advice Line Worker and confirmation of these appointments given at the time of taking the referral. (Advice Line Workers need to check the SLA list for exceptions to this). A copy of the appointment letter is to be placed with the 'green' intake form.
- 4.7 Making appointments for service users is dependent on current contractual arrangements with the Local Authority and these will be made known to the Advice Line Workers. Advice Line Workers are expected to acquaint themselves on a regular basis with these exceptions. Relevant PAC information and reading lists will also be made available to the service user by the Advice Line Worker or allocated counsellor.
- 4.8 At the initial assessment interview, the service user's need for an adoption support service will be assessed by the counsellor either at PAC premises in Kentish Town, through telephone counselling or in an Outreach Surgery, using the PAC Initial Assessment form and Core Questionnaire. The contents of the initial contact pack will be shared with the service user, including confidentiality and the exceptions to this in relation to safeguarding of self or others. The CORE Questionnaire may be

completed by the service user at the first session and will provide some basic information for an assessment of need. To standardise PAC practice, the CORE questionnaire and the initial assessment form should be completed for each new adult client, even if a referring local authority has completed its own assessment of need. (These particular forms do not apply to the Child and Family Service. See their Intake Procedures).

5 Advice Line and Adult Counselling Service at PAC Premises

- 5.1 The Advice Line is usually the first point of contact with PAC. All Advice Line contacts will be entered onto the database and a new ID number obtained. Contacts are also logged manually in the Advice Line log book, including date of contact and other basic information. Advice Line counsellors complete a green intake form documenting the contact's identifying information and the nature of the referral. Contacts can be via the telephone, post, email or website. If the client's needs cannot be met at PAC, (s)he will be signposted to the appropriate agency. Some referrals are dealt with only through telephone contact (e.g. advice and information) and counselling.
- 5.2 The Head of Adult Services or the Deputy CEO is responsible for allocating cases from the Advice Line in-tray based on the information on the green intake form and will ensure either a) that the service can be provided within the local authority's existing subscription, or b) that there is agreement to a 'spot purchase' by the individual or Social Services to pay for counselling sessions at current PAC rates (see PAC's Schedule of Charges).
- 5.3 The Adult Counselling Service is provided by PAC permanent, sessional and placement counsellors on a weekly, fortnightly and monthly basis.
- 5.4 If there is a waiting list for allocation of counselling, the service user will be contacted either by letter or by telephone within 7 working days to inform them that there will be a delay in offering them an initial appointment.
- 5.5 Once a Counsellor is allocated a counselling referral, the Counsellor needs to arrange an appointment with the service user within 7 working days and send a Welcome Pack, to include a letter of confirmation and directions to PAC's offices in Kentish Town.
- 5.6 The date of the service user's first appointment must be entered in the relevant column of the book. This will facilitate a review of PAC service provision as well as data collection at the end of each financial year.

- 5.7 Advice Line counsellors must also respond to enquiries sent by emails or letters within 5 working days. These are logged in the same way as telephone referrals.
- 5.8 Record-keeping: The service user will be asked to complete the 10 questions on the CORE Questionnaire. The Outreach Counsellor will complete the Initial Assessment form (peach) to provide evidence for the assessment of need. The Adoption Support Therapeutic Contract is also completed and signed by the service user and counsellor at the first session. However, some service users prefer to take away this contract for consideration, returning it at a later date.
- 5.9 Subsequent sessions are currently recorded within 3 working days on the case session notes form (yellow), running contact sheets (green) for telephone and e-mail contact, and closing summary (lilac) form. Blank copies of the case forms are kept in the PAC office or can be requested from the admin staff at PAC. PAC plans a new database, and the expectation is that all contacts will be entered directly onto the database, thus moving PAC to a paperless environment during 2013-14.
- 5.10 Any supervision notes (pink for initial or ongoing consultation) on the case should be kept with the file. Counselling notes should be factual and succinct, avoiding personal judgement or value judgements. Counsellors may wish to keep working notes (white) for use in sessions with the client; these notes, however, do not form part of the permanent file. Counsellors need to be mindful that a service user may request to see the recorded notes and in some situations the notes could be called upon in a Court of Law, especially in cases relating to any form of abuse.

6 Telephone Counselling Service

- 6.1 Referrals for telephone counselling should be received via the Advice Line and recorded as a referral in the same manner as all other referrals. A leaflet detailing the telephone counselling service including how to prepare should be sent to the service user.
- 6.2 If the request is from a non-subscribing authority, staff must explain the charges associated with telephone counselling. Requests from subscribing authorities will be eligible for a telephone counselling service in the same manner as if they were to be seen face to face.
- 6.3 Staff must explain the preferred requirement to have at least one to one face to face session, but that this could be via Skype. Staff undertaking this form of service provision must have received training to undertake this service delivery. (See separate Skype Counselling Policy and Procedure).

- 6.4 Whilst the service can be provided at PAC offices, it can be undertaken by counsellors from their own premises or home after careful assessment.
- Staff undertaking this form of work need to ensure that their personal space is not compromised by undertaking the work at their homes.
 - It is important to establish very clear boundaries including a start and finish time, to avoid the session being treated too informally.
- 6.5 Staff must ensure that they have a resource bank of information and materials available to them (similar to the Advice Line) to ensure that support services can be made available should the service user require them at the end of a session e.g. Samaritans, Social Services.
- 6.6 Staff will be provided with a mobile phone in order to undertake this service in order that counsellors' personal phone details do not need to be divulged.
- 6.7 Staff must familiarise themselves with the Skype Policy and Procedure to ensure confidentiality and data protection issues are complied with.

7 Outreach Surgery Counselling Service

- 7.1 Outreach Appointments: An outreach surgery appointment is offered by the Advice Line Counsellor (see Local Authority list for exceptions) taking the initial telephone referral. The client's name, ID number, telephone number and service user status needs to be entered in the relevant Outreach Surgery appointments diary. This is shortly to become an electronic diary. Some appointments can be confirmed at the time of taking the referral, or the client may confirm at a later date. In some cases, the Outreach Counsellors will make direct contact with the client to arrange/confirm their own appointments.
- 7.2 Within 7 working days, a Welcome Pack, together with an appointment letter, with directions to the venue, has to be sent to the client, with a copy kept together with the 'green' intake form. An information leaflet for that particular Outreach Surgery should be included with the Welcome Pack, as well as information on relevant PAC services and training events and publications lists.
- 7.3 Record-keeping: The client will be asked to complete the 10 questions on the CORE Questionnaire. The Outreach Counsellor will conduct the initial assessment and complete the Initial Assessment Form (peach) to provide evidence for the assessment of need. The Adoption Support Therapeutic Contract is also

completed and signed by the client and counsellor at the first session. However, some clients prefer to take away this Contract for consideration, returning it at a later date.

- 7.4 Subsequent session records (yellow); running contact sheets (green) for telephone and e-mail contact and a typed or legibly-written closing summary (lilac/purple) form part of each file, using the appropriate coloured PAC forms. Blank copies of these are available from PAC's main office or can be requested from the administration staff at PAC. The client's name/ ID number and service user status and allocated Outreach Counsellor must be entered in the appointments book.
- 7.5 Any supervision notes (pink for initial or on-going consultation) on the case should be kept with the file. Counselling notes should be factual and succinct, avoiding personal judgement or value judgements. Counsellors may wish to keep working notes for use in sessions or over the course of a therapeutic assessment, or for the duration of contact with the client; these notes, however, do not form part of the permanent file. Counsellors need to be mindful that service users can request to see the recorded notes.
- 7.6 Outreach Counsellors may photocopy the 'green' intake form for their own use, and store it securely at all times. However, the original 'green' and case notes must be kept at all times at PAC – initially in the referral tray, which is stored in the Advice Line Room until the case is opened, and then transferred to the Adult case filing system.
- 7.7 PAC does not see children under the age of 17 in the Outreach Surgery, unless an initial assessment has been done first. In particular circumstances, they may be seen alone without parents or an appropriate adult, if an initial assessment has been done and it has been discussed and approved by the Deputy CEO or the Head of Adult Services. The exception to this is if a young person has already left home and is living independently, which applies to some adopted adults and young birth parents.
- 7.8 Outreach counsellors may need to receive regular telephone supervision in relation to this work from the Head of Adult Services or the Child and Family Service Practice Manager. Any child and family work in the Outreach surgeries may be delivered by two counsellors and may require the permission of the local authority.
- 7.9 Providing a report in relation to work in the Outreach Service or the Adult Counselling Service is not part of the service provision. If a local authority or an individual requires a report, this needs to be requested formally in writing before

the work begins. The purpose of the report needs to be clearly stated. This will incur an additional cost and the payment of this cost must be agreed in writing before the work can begin. If the report is requested by the local authority, the information shared in the report will need to be shared with the client as well as the local authority.

8 User-Focused Advice Line, Adult Counselling, Telephone Counselling and Outreach Services

- 8.1 All PAC Counsellors and Outreach Workers must provide each client with a clear explanation of what is involved in counselling service provision. They must obtain her/his informed consent to it through a therapeutic contract which should be discussed with the client at the initial assessment interview, and signed and dated by both client and counsellor.
- 8.2 The views of all service user groups including Relinquishing or Non-Consenting Birth Parents, Young Adopted Persons or Adults, Transracially Adopted Adults and Adoptive Parents/other Permanent Carers are sought as part of our monitoring of service provision.

9 Monitoring and Review of PAC Advice Line, Adult Counselling, Telephone Counselling and Outreach Services

- 9.1 PAC constantly strives to improve its services, working in partnership with clients and subscribing authorities. Feedback from users, verbal and written, during and at the end of the counselling provided should be routinely sought and needs to be carefully considered by PAC counsellors and management, when reviewing service provision.
- 9.2 Ongoing monitoring and evaluation of the service is given priority by PAC, and service users' and subscribing authorities' views are taken into account when reviewing its Advice Line, Adult Counselling, Telephone Counselling and Outreach provision. Clients are asked to complete service evaluation forms anonymously after 4 face to face counselling sessions or after closure of their file, in cases where the service user did not take up all available counselling appointments available to him/her. A summary evaluation is made with all responses for dissemination to the Board, CEO, staff, and commissioning agents. Remedial action will be taken to rectify identified weaknesses.
- 9.3 Client feedback forms for Adopted Adults, Birth Parents and Adoptive Parents/other Permanent Carers will be given to service users to complete at their

final meeting with the counsellor. These one page questionnaires are different from the service evaluation form described in 8.1 above, in that they measure the effect of providing therapeutic counselling on a numerical scale. Feedback from these forms will indicate the effectiveness of the counselling provided.

- 9.4 The CORE questionnaire will be administered at closure of each case. Comparative analysis with the initial questionnaire completed (see 4.8) will be made to assess the effect of the service.
- 9.5 These services will be reviewed annually to ensure compliance by PAC staff with prevailing legislation, regulations, standards, guidance and best practice.