

Case study – Eric Battersby

*The case study below is an example of how an assessment conversation ('the conversation') might progress using the approach advocated by Essex County Council. It also incorporates the use of powerful questions, and active listening skills.

Eric Battersby is a 46 year old man. He is partially sighted with a range other of health issues including diabetes and a heart condition. Eric is on dialysis and has a below the knee amputation to the left leg. His wife Yvonne is reportedly having great difficulty helping her husband up and down stairs and in supporting him with his personal care. The District Nurse has requested a social work assessment as she feels the relationship is at risk of breaking down.

Jo is an Newly Qualified Social Worker (NQSW) about to complete his Assisted and Supported year in Employment (ASYE). Jo's assessor has asked him if he will take this case under guidance as she feels Jo is ready to take a more complex case.

Prior to visiting Mr and Mrs Battersby Jo rings the District Nurse for some more background information. At the same time, he confirms that the couple are aware that the District Nurse has asked for a visit from a social worker. Jo then contacts the couple to clarify this with them too. When on the phone Jo can hear some tension in Mrs Battersby's voice, so checks when would be a suitable date and time to visit them both.

Jo offers to e-mail them some information about the conversation so they are aware of what to expect, for example, a checklist of questions that might be asked and the aspects of their well-being that might be affected. Mrs Battersby felt this would be helpful as would give her and her husband chance to prepare for the visit.

Prior to the visit Jo has an informal conversation with his supervisor to plan and prepare for his approach.

Jo arrives on his visit at the agreed time. As he is being shown in by Mrs Battersby he notices that Mrs Battersby is not wearing any shoes. Jo and asks her if she would like him to take his shoes off before entering the house. Mrs Battersby replies that she would appreciate this if Jo doesn't mind.

Jo introduces himself to the couple and asked them to call him Jo. He then clarifies with them how they would like to be addressed. They both indicate that they would prefer to be called by their Christian names.

Jo, waits to be offered a seat before sitting down and then starts the conversation by clarifying with both Eric and Yvonne the reason for his visit. He explains that he would like to take some notes during the conversation and will be using the same checklist of questions that he had e-mailed to them in advance. Jo reassures them that he will keep checking back to make sure her notes capture things accurately and have the important points down.

Jo can sense tension between the couple, Yvonne is perched on the edge of her chair, and Eric is sloped down in his chair with his head hanging low. Jo decides to put his notes down and focus on both Eric and Yvonne and asks a question "I'm sensing some tension in the room, can I check with you Eric why you think I am here?". Eric's responds by becoming tearful and shaking his head. Jo rephrases the question "What is really worrying you Eric?". Eric responds saying the District Nurse has said he needs to consider 24 hour care as his care needs are too much for his wife. Jo asks "What do you think Eric?". Eric says he feels too young to be in care, but will have to go if Yvonne doesn't want him. Jo hears Yvonne in a small cracked voice say "That's not true I do want you I just can't manage". Jo checks with Eric that he had heard Yvonne's response.

He shakes his head and shrugs his shoulders. Jo encourages Yvonne to repeat the first part of what she said about wanting him still at home. Jo then asks Eric "How does that make you feel hearing Yvonne saying she still wants you here in your home?". Eric says it gives him some reassurance.

Jo seeks some clarification from both Eric and Yvonne, "Here's what I am hearing, you both want to stay together in your own home but Yvonne your finding it increasingly difficult to offer the level of support Eric needs to meet his needs. Is that right"? Both state that "in a nutshell yes, that is the case".

Jo starts to find out how he can best connect them to things that will help them get on with their lives by asking them, "What was good about your lives in the past?". He encourages them to talk about themselves, their relationships, family, work, hobbies, interests and their home and neighbourhood they live in. Jo learns that they have been married 20 years and have a daughter who lives locally with two grandchildren. They moved from Cumbria, two years ago down to Essex to support their daughter in raising her two young children following the breakup of her marriage.

Both have been in reasonably good health before they moved, although Eric had been diagnosed with Type 1 diabetes, he had it under control. Eric managed to secure a job with Essex Council working in the Parks and Gardens, a job he loved. Yvonne got to spend time enjoying bowls and spending time with her grandchildren.

Jo listens actively to what they both had to say, he doesn't interrupt or offer his thoughts or opinions on the things they are telling him. He encourages them to open up about their lives by nodding, acknowledging what they are saying with her facial expressions and occasionally prompting them to continue. He is empowering the couple to be in control of the conversation. Jo clarifies this by saying "I'm hearing you have had a good marriage, work and home life, can I ask each of you how you feel that that has changed?".

Eric talks about how his diabetes worsened eight months ago - initially affecting his eye sight, but recently his left leg was affected resulting in a below the knee amputation. He has limited muscle tone in his right leg and needs walking aids to get around. Eric also receives nightly dialysis monitored by Yvonne; a kidney transplant has not been an option due to potential health complications. The impact of his combined health conditions has left him fully reliant on Yvonne for all his personal care needs, diet and nutrition and other daily living tasks. His visual impairment affects his ability to follow his interest in reading too. Jo asks "Eric what impact is your health having on your overall quality of life? How has this affected you?". Eric answers that he has become quite isolated at home as a result of issues with mobility and visual impairment. Jo deepens the conversation asking "Tell me more about that?". Eric talks about his interest in military history and his range of journals and books. He expressed that he would like to put the information that he had collected on his computer, but felt he couldn't do this alone as a result of his visual impairment, he feels as Yvonne doesn't share this interest it's not fair to ask her to help. Eric also makes reference to no longer being able to read the local newspaper and feeling detached from the community as Yvonne struggles to support him getting out and about now.

Jo asks "In what other areas has your illness and disability impacted on your life? I noticed you looked happy when you talked about your job working in the Parks and Gardens".

Eric responds saying he loved that job and misses gardening and being outside. He and Yvonne have a large garden on two levels. Maintaining this is now an issue as Yvonne has not been able to manage the upkeep on her own and it has become overgrown.

Jo says to Eric "You've explained very clearly to me the impact your illness is having on your life can I just check I've got the key points down". He reviews his notes, confirming what he has written with Eric then pauses before asking "What do you feel the impact may be having on Yvonne?".

Eric responds saying although he had become socially isolated not going out much anymore, he is actually more concerned that Yvonne has also stopped going out and pursuing her own interests. Jo makes eye contact with Yvonne and asks her "What do you think about what Eric just said?". Yvonne confirms that she too feels isolated as a result of the level of support Eric required. That she feels unable to go out for fear of him needing assistance when she isn't there. There is no one else they can call on locally, as since moving they have limited contacts. They have their daughter but she is balancing work with bringing up two young children.

Jo noticed Yvonne was becoming tearful, so he responded to Yvonne saying "Yvonne I can see this is having a real impact on you, how is that affecting how you feel in yourself?". Yvonne responds saying that she feels tired and in need of some time to herself. Jo asks her "Can you explain a bit more about what time to yourself means to you?" Yvonne responds saying that it would be nice to go out and pursue her own interests particularly bowling, where she had started to make friends. She also loved helping her daughter with the grandchildren, and was feeling very guilty about no longer being able to do that - but she also felt she should be the one supporting her husband's needs. Jo seeks clarification from Yvonne by asking "It sounds like you are feeling very torn between your responsibilities and time for yourself? Is that right?".

Yvonne nods her head and after a couple of minutes responds saying meeting Eric's needs was becoming more of a challenge due to his reduced mobility and her difficulty supporting him with moving and handling, that this was making her feel tired. She feels she can't leave him in case he falls, but also feels she should be supporting her daughter more.

Jo seeks further clarification from Yvonne "What do you really want?" Yvonne states that she needs a break from her caring role and that having the freedom to go out knowing Eric would be safe or able to get help, would provide her with reassurance. They know of no-one locally who could sit with him if she went out. Jo continues by Yvonne asking "What else do you need to continue in your caring role?". Yvonne replies she would like some time with her grandchildren and to be able to support her daughter without feeling guilty about leaving Eric.

Jo then asks Eric "Eric, Yvonne has explained to us what is important to her, what is important to you?". Eric states that staying at home is important to him and he would not want having someone sit with him as if he needed a "baby sitter". Jo says to Eric "I asked Yvonne what she really wanted, can I ask you what you really want?"

Eric tells Jo that he actually enjoys time on his own, and would like to be able to sit in his garden and read, but the garden is too overgrown and he can't see to read so what was the point. Jo notices Eric looking very dejected and say "It seems to me like you may have given up Eric am I right?". Eric looks taken a back and after a pause responds saying "I suppose so". Jo addresses them both "I think it would be good to reflect back on our conversation so far, here is what I am hearing. You both want to continue living together at home, and you both want to continue with Yvonne meeting your personal care needs Eric. It's important to you both for these things not to change, is that right?" Both say yes that's correct. Jo continues "However, for this to happen Yvonne, you need some time to yourself to pursue your own interests and support with the grandchildren. Eric you are happy to stay at home if you can find a way to pursue your interests in military history, and enjoy your garden again. Is that what your outcomes would be?"

Both are in agreement and Jo can feel a change in the atmosphere in the room. They both seem slightly relieved and more engaged.

Jo says "Well you both seem clear on what outcomes you want to achieve. What are your options to achieving these outcomes? If we take each one outcome at a time and explore what needs to happen to achieve them would that be helpful?". Both agree this would be a helpful way forward.

Jo addresses them both "What is the most important outcome for both of you at this time that will have the biggest impact on improving your lives?". Eric is clear that it is for Yvonne to be able to go out without worrying about him, whether it's to look after the grandchildren or play bowls. Yvonne too feels if she could do this she would feel less torn and guilty. Jo asks them "What can we do to make that happen, I have an idea but would be good to hear yours first?". Yvonne responds saying that when she used to go bowling there was an elderly couple she had got friendly with and had once gone back to their house for a coffee, and she was sure they had some sort of response call system as the husband was prone to falls.

Jo responds "Yes, Yvonne, great idea, I was thinking along the same lines as we have prevention services that have fall alarms and things like that. I could check whether they have an alarm device that would allow you to go out but Eric could trigger if he needed you. Would you like me to look into that?". Both Yvonne and Eric are in agreement to Jo looking into this option.

Jo turns to Eric, "So Eric what would be a most important outcome that was going to have the biggest impact on your life for you?". Eric looks a bit frustrated and snaps "I've said my garden and reading which I can't do". Jo gently challenges Eric, "I hear you Eric, so let's take your garden first. You said the maintenance of it has become a burden so now it's overgrown, what could you do to change that?". Eric responds saying that he supposed they could get someone in to maintain it for them, but wouldn't know where to start. Jo asks him "Who do you know from your work on the council, might there be any options there?". Jo stays quiet whilst Eric thinks. Eric says there were a couple of the lads that he got on well with. Yvonne interrupts laughing asking him if he is referring to Harry and George stating "they are not lads but nearly as old as him". Jo notices a twinkle in Eric's eye, something has resonated with Eric. He goes on to say, yes he knows but he got on well with them, and there had been recent redundancies from the council so they might be interested in some work.

Jo asks "How would it be if you checked that out Eric?" Eric responds saying yes he could do that as it might be good to get back in touch anyway. Jo continues the theme of the garden. "What is stopping you accessing your garden Eric?". Eric explains that it is on two tiers and he has nothing to hold onto to be able to get from the lower level to the upper level. Jo continues "Yes I can see why that would be difficult. You also mentioned at the beginning of my visit that you were struggling on the stairs and with some aspects of personal care. Is that right?". Eric and Yvonne both respond saying the stairs are a struggle but they don't want anyone to come in and support with this. Jo responds empathetically by saying "Hmmm, I can appreciate that your independence is very important to you both, but how would you feel about a visit from a colleague of mine who is an occupational therapist, she would be able to advise you of any aids, like grab rails or handrails which might support Eric to be more independent both in and outside of the house?". Yvonne and Eric respond that it sounded like a good idea but they didn't want to have to go through another assessment and cover all the same questions again. Jo reassures them by saying "I would explain to my colleague your situation, show her everything I have written down and we have agreed, so she would be aware of your situation before she came. She would be asking about in more detail about how you manage on your stairs and accessing your garden. We haven't covered those in detail. She would check if you managing with other aspects of your mobility and

discuss and support you might need with this you if you wanted. How does that sound?" Both feel this sounds fine.

Jo then picks up on Eric's frustration being unable to read. "The other important outcome you mentioned Eric was being able to see to put your information on the computer and read the newspaper?". Eric responds that yes it was but actually if Yvonne could get out and he could access and enjoy his garden again then this would have less impact as he wouldn't be so bothered. Jo responds "That's fine Eric. But I will leave you a contact number of the local library, as they have a system for e-mailing the local newspaper which you can then read in large print. They also have volunteers, who might be able to help you put your journals onto your computer". Eric takes the contact and thanks Jo.

Jo asks them "Would you like me to help you to put a plan together of the outcomes you have said are important to you and the actions we have agreed to help you achieve them? We can then be clear about who is doing what and when?".

Both Eric and Yvonne feel this would be really helpful. Jo checks if they would like a break before doing this. They agree to stop for a cup of tea.

Before Jo leaves he tells them she will send them a copy of the plan they have agreed with the actions. Jo agrees to keep in contact with them over the next few weeks to make sure everything is being put in place that is needed to support them to achieve their outcomes. They also agree a date for a formal review of the plan in a month.

Formal Review – Eric Battersby

Jo arrives at the house at the agreed time and knocks on the door. Yvonne answers the door and welcomes Jo in. Yvonne shows Jo into the living room and offers him a seat next to Eric.

Jo can sense a change in both Eric and Yvonne. Eric is sat up and Jo can see that twinkle in his eye that she got a little glimmer of last time. Yvonne is looking relaxed and Jo notices that she is wearing makeup. Jo starts the conversation "I know we have kept in touch by phone, but do you want to tell me how things have been since my last visit?"

Eric and Yvonne both respond together saying "Great" in unison then laugh. Jo joins in saying "Well, yes I can see that too". "Can I ask you first Yvonne how you are feeling since we last met?". Yvonne states that she feels a lot less tired, and less worried, as the prevention people have been and provided an alarm for Eric – he can activate this when Yvonne is out and he needs help. The alarm is linked to a response service, if Yvonne can't respond. Jo asks, "When we met last time Yvonne you said you were feeling torn between supporting Eric and your daughter with your grandchildren. How has that been?". Yvonne responds that although it was early days, it seems much better and she has been able to spend time looking after the grandchildren without worrying as much about Eric. Jo asked "Have you felt able to get back to your bowls?". Yvonne said that she hadn't yet but thought she would do as her confidence in leaving Eric grows.

Jo turns her attention to Eric, "So Eric, can I ask how you are feeling since we last met?" Eric said he was feeling really good and thanked Jo for helping him take control back of his life. He said he had contacted his colleagues from the Council and Harry had come to see him. He had agreed to take on the maintenance of the garden and had made a great start.

Jo asked him "Sarah the occupational therapist tells me she has been to visit, how do you feel that it went?". Eric said he wanted to show Jo something and led her out the backdoor into the garden. He showed Jo the handrails which enable him to access his garden. Jo responded "Wow that is fabulous Eric, and your garden is looking lovely, how does this make you feel?". Eric said he felt happier as he had really missed his garden, he has some quality of life back that and more independence. He tells Jo that Sarah had also arranged for handrails on the stairs which meant he could manage them much easier without needing Yvonne. Jo tells Eric how pleased she is to see the impact the changes have had for both him and Yvonne.

She then asks Eric, "I was wondering whether you decided to contact the library about accessing the newspapers online or getting a volunteer to help with your military history information?". Eric responds, that he hadn't but it had turned out that Harry had also an interest in military history and had been helping Eric put all his information onto his computer so there had been no need.

Jo responded to both Eric and Yvonne, "Do you feel you have met the outcomes you each wanted to achieve to support each other?". Both smile at Jo and explain yes they have, more than they thought they could have done and can't thank Jo enough. Jo replies "I only supported you to find your own solutions that's was my job. Sometimes when we are having a difficult time we can't see the wood for the trees and need someone who is outside of the situation to talk to about it. I can see a change in you both which is great to see. I am still new to social work so it's lovely to hear you feel I've helped. Do you mind if I ask you if there is anything I could have done differently that would have given you a better experience? It's good for me to know how I can improve and develop."

Yvonne says, that she felt Jo had been very polite and respectful, and it had not gone unnoticed that she had checked about taking her shoes off, waited to be seated, and

checked how they wanted to be addressed. They both had felt she had listened to them and appreciated how they were feeling. More importantly she had time to think through their options. If they were going to offer any criticism it would be around the first visit, they had found it quite tiring as they were both emotional and feeling at the end of their tether, and perhaps breaking for a cup of tea earlier would have been better.

Jo thanked them for their feedback which he said she would take on board when visting other people. Before leaving Jo agreed that he would contact them next in 6 months to review how things were going. He checked they had the right contact details for him and the office (out of hours) and made sure that they knew they could get in touch anytime if anything was to change.