Advocacy QPM

Recognising quality in independent advocacy

an NDTi Programme

QPM – Remote Site Visit Preparation

This document contains information to help you prepare for your QPM site visit/s.

Following successful review of your desktop submission, your assessor will be in touch to plan the remote site visit/s to your organisation. If you are working to a particular time frame your assessor may be able to provisionally plan your site visits with you ahead of this, so do make your assessor aware of any particular needs and we will aim to accommodate these where we can.

The aim of the site visit is for your assessor to meet with key staff, volunteers and stakeholders to further understand your advocacy delivery in relation to the **advocacy charter** and the QPM indicators.

At site visit, we aim for the conversations to be friendly and informal; we want to learn more about how the advocacy organisation delivers its services and puts the principles of the **advocacy charter** into practice in the way the organisation operates.

The site visit is where the assessor can check things out and get more evidence about the information you gave us in your desktop submission, follow up any areas where they feel they need more information, as well as explore the charter principles more generally. There is further information at the end of this document about topics the assessor will want to cover in the various site visit interviews.

For organisations with under 15 advocates, we will usually need to be with you on site for one full day. For organisations of up to 30 advocates, 2 full days. For larger organisations we will plan and detail the number of site days with you using the information in your Pre-Assessment Questionnaire (PAQ). There is a draft agenda for the site visit day/s at the end of this document. Your assessor will plan with you how best to structure the day/s for your organisation.

Who do we need to see?

During the site visit, your assessor will want to meet with a range of different people, as shown below:

- CEO/Director
- A Board Member
- Advocacy Manager/s
- Supervising Advocates
- Advocates (see below)

- People who have used services
- External Stakeholders

If your organisation has a 'steering group' or involvement group of people who use your services, it can also be helpful for us to meet with a representative from this group.

For larger organisations we may also see:

- Referral team/First Point of Contact Team
- Business Development Lead
- Training Lead
- Policy Lead
- Operational Lead
- Practice or Quality Lead
- Any other relevant role

Because of the Coronavirus Pandemic, we are still operating remote site visits. We are undertaking site assessments via Microsoft Teams and/or zoom. You will need to ensure that there are confidential spaces for people to talk to your assessor and that people have internet access for the site visit. In some instances, we can speak to external stakeholders and people who have accessed the advocacy service on the phone or via WhatsApp. Please discuss this with your assessor to check this is acceptable, in advance of your site visit.

Below is some further information about the nature of the conversations your assessor hopes to have with people during the site visit. However, as stated above your assessor will want to reflect on your desktop submission and how the organisation works to the advocacy charter generally.

Meeting with CEO

Where your organisation has a CEO, who isn't directly managing advocacy services, your assessor will want to meet with them to talk about the following in relation to your advocacy delivery:

- The organisation and services delivered
- Governance
- Leadership
- Involvement of people who have used advocacy services in the organisation and the board
- Promoting and Protecting Independence
- Managing Conflicts of Interest
- Approach to Equality and Diversity
- Partnerships
- Commissioning/contract management
- Monitoring, outcomes and impact
- Raising Issues and Challenges externally
- Workforce support and development

Meeting with Board Member

- Them and their role with the organisation

- Information about the board – how they operate, numbers of board members, frequency of meetings, board's approach to governance for independent advocacy
- Protecting and promoting Independence, potential threats to independence
- Managing Conflicts of Interest
- Involvement of people who have used advocacy services in the organisation and the board
- Trustee recruitment and induction – equality and diversity

Meeting with advocacy service manager/s and supervising advocates

- The organisation and services delivered
- Leadership
- Promoting and Protecting Independence
- Managing Conflicts of Interest
- Approach to Confidentiality – information sharing/withholding information/data protection
- Approach to Equality and Diversity and Accessibility
- Partnerships
- Commissioning/contract management
- Monitoring, outcomes and impact
- Workforce support and development, maintaining Best practice
- Involvement of people who use services
- Outreach and promotion including identifying and addressing gaps, signposting
- Approach to systemic advocacy, raising challenges externally
- Getting feedback on the services delivered/managing complaints
- Case 'management' and advocacy processes, e.g. prioritisation, waiting lists, file/case audits, case closure

Meetings with advocates

Where we are meeting a range of advocates, your assessor will arrange with you whether we meet with them individually or in small groups (up to 3) where this appropriate. We may see more than one 'group' within the site visit and will plan this with you. For example, where you have distinct IMCA, IMHA, Care Act, IPA, Community Advocacy teams, we can see people in their teams. Where advocates are 'multi-skilled' we will plan with you the best way to talk to people.

Your assessor will need to meet with a minimum of 30% of advocates from your organisation. For small organisations (under 15 whole time equivalent (WTE) advocates), we may need to meet with a larger proportion of the team. For organisations with more than one day of site visits, we need to meet a minimum of 30% of advocates working under each service manager. Advocates should be representative of all types of advocacy delivery in your organisation.

Please do check with your assessor when finalising plans for your site visits.

Here are the areas we will want to cover with advocates:

- Them and their role
- Approach to Confidentiality and information sharing/withholding information
- Non-instructed advocacy

- How they explain their role to people using the service and others
- Challenges
- Codes of Practice that they work to and how these are used in practice
- Signposting
- Empowerment and promoting Self Advocacy
- Supporting people with additional needs
- Approach to equality and diversity
- Safeguarding
- Case management, beginning and ending the advocacy relationship
- Outreach and promotion
- Support, supervision, training, qualifications, induction
- Equipment and resources to support effective advocacy work
- Legal frameworks and keeping up to date
- Making complaints and challenging

Meeting with people who have accessed the service

We will be entirely led by you when it comes to speaking with people who have used the service and your assessor can provide you an information sheet for you to share to help explain the purpose of the visit and nature of the conversation we hope to have. You and your assessor can plan this part of the assessment ahead of the site visit taking place.

Conversations are very informal – more a chat over a cuppa and can be just a few minutes long, up to about 30 mins if people have more to say. We understand that people's schedules and priorities mean meetings don't always go to plan – that's ok in this instance!

We are happy to talk to people via Teams, Zoom on the phone or via WhatsApp – whatever works best for them. We're happy to talk to people in groups but are mindful of confidentiality issues and this doesn't always work unless people already know each other and are comfortable to talk in a group.

We don't need to know about the person's advocacy issues, but do want to know about their experience of using the service, including:

- How did you find out about the service?
- What was it like having an advocate?
- What was good about having an advocate?
- Did you feel the advocate respected your right to confidentiality?
- Was there anything that could have been better?
- Were you given opportunities to give feedback about the service?

Meeting with external stakeholders

For conversations with Stakeholders, we will again be led by you, but it is helpful for your assessors to meet with Commissioners, Ward or Home Managers or Mental Health or DoLS Lead, or a regular refer to the service. Do check in with your assessor if you're not sure about who might be appropriate. We are happy to talk to people via Teams, Zoom on the phone or via WhatsApp – whatever works best for them.

We want to hear about the person's relationship to you as an organistion and their experiences of working with you and your advocates, potentially including:

- Clarity of advocacy role/s and boundaries
- Maintaining independence
- Partnership working
- Addressing challenges
- Meeting needs of people who use the service/Person centredness
- Raising and resolving issues
- Ease of referring to the service
- Quality of service
- Timeliness

Draft Site Visit agenda

This gives you an idea about the amount of time we need to spend on each conversation. The running order can change around, but it's helpful for us to begin and end the day with the advocacy manager/CEO/lead for QPM. For organisations who will have more than 1 day of site visit, we will design the visits and agenda for each day with you. Please note that people don't need to be available for the whole day, just their scheduled time. As you will see it is a full day and so ensuring people are available on time will be helpful to your assessor in terms of a smoothly running site visit!

Where the size of your organisation means that we only need to see one group of advocates it's best if we have more time with them, with stakeholders and with people who have used the service.

Draft agenda

9.00-10.30	Advocacy Manager
10.35-11.05	Board member
11.10-12.10	Senior Advocates/Supervising Advocates
12.10-12.40	lunch
12.40-13.20	People who used the advocacy service
13.25-14.45	Advocates group 1
14.50-16.10	Advocates group 2
16.10-16.45	External Stakeholder/s
16.50-17.00	Feedback to Advocacy Manager/CEO
17.00	close

For each conversation, please let your Assessor know:

- The email addresses and/or phone numbers for those involved
- Preference for zoom or Microsoft teams

Your assessor will then arrange for meeting invites to be sent for each online conversation.