



Gofal Cymdeithasol **Cymru**
Social Care **Wales**

What matters conversations and assessment

First published: 19 March 2019

Last updated: 25 September 2022

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Find out more about the importance of having what matters conversations with the individual and how those feed into the assessment process

What matters to the individual?

A 'what matters' conversation is a targeted conversation relating to any assessment process.

It refers to a skilled way of working with individuals to establish the situation, their current well-being, what can be done to support them and what can be done to promote their well-being and resilience for the better.

It's not an assessment in itself: it's a way of carrying out the assessment, with the practitioner having the right type of conversation to identify with the individual:

- how they want to live their life
- what might be preventing that
- what support might be required to overcome those barriers.

The importance of being equal partners in the conversation

A 'what matters' conversation is a discussion between equal partners (also known as 'co-production'), to identify, from the individual's lived experience and the expertise of the practitioner:

- how the individual wants to live

- what is preventing those aspirations
- what support can be put in place to make aspirations a reality.

The 'what matters' conversation between the practitioner and the individual or carer is very important.

It may be the first time that someone has been asked to think about how they would like to live their life - what matters to them - or had a conversation about barriers they may face or what support could overcome those barriers.

Some individuals and carers may be very clear about what is important to them.

Others may need support to think this through, especially if they have never accessed care and support through a local authority or have been accessing services for some time.

[Independent professional advocates](#) can play a key role in ensuring effective communication between the two parties.

It can ensure that individuals and carers understand the process and can participate as equals.

Understanding the options available for care and support

People may expect services that focus on specific times of the day and tasks of personal care because it is what they're used to or what they have seen others receiving.

They may need support to understand what their options are and to make their choices as an equal in the conversation.

Practitioners need to take time to listen, understand and support people to explore options and find solutions.

It's important to remember that for individuals, the assessment process will be the same, no matter whether they decide their needs will be met best by using direct payments or through support from the local authority.

The journey is the same but the end product will be different, depending on what matters to each individual and how they choose to arrange any care and support they need. See the section 'What can direct payments buy'.

What makes a good care and support assessment?

The Social Services and Well-being Act (Wales) 2014 (the Act) and its Codes require practitioners to work with individuals as equals – sharing power and esteem by co-producing the 'what matters' conversation.

The Co-production Network for Wales defines 'co-production' as:

An asset-based approach to public services that enables people providing and receiving services to share power and responsibility, and to work together in equal, reciprocal and caring relationships.

It creates opportunities for people to access support when they need it, and to contribute to social change.

There is also a definition of 'co-production' as a "genuine partnership" in [paragraph 4 of the Code of Practice for Part 10 of the Act](#).

The Act is a clear move away from a 'time and task', minimalist, 'personal care only' approach and encourages people to identify and insist upon whatever support they need to live the life they choose.

It is not enough for the practitioner to ask the individual "What matters to you?"

They should support people to understand what they are legally entitled to under the Act.

Preparation tips for practitioners and direct payments recipients

The practitioner and the direct payments recipient should agree a suitable time and place for the needs assessment.

This will help make it a positive experience for both parties.

Here are some preparation tips:

- All parties should be comfortable in the location
- Practitioners may need time to arrange for an independent advocate to work with the individual and attend the assessment
- To support the assessment process, the practitioner should give the individual information days or weeks in advance to consider how they want to live their lives, what support they already have in place and what barriers there are to them achieving their well-being outcomes

- In the case of joint assessments, ensure there is enough time to arrange for other people who are involved in the assessment to be present
- People may need time and prompting to consider what family or community support is available to them as well as how local authority support may further enable family or community support to happen.

Remember the ‘what matters’ conversation

The social care practitioner should have the skills to lead an outcomes-focused conversation that focuses on personal well-being outcomes when assessing whether an individual has eligible care and support needs.

The Welsh Government's [National Outcomes Framework for People Who Need Care and Support and Carers Who Need Support](#) describes personal well-being outcomes in detail.

It's important to understand not only what matters to the person but why they matter.

And also what the barriers might be and why any proposed interventions or support will improve the person's well-being, not just now but into the future.

For example, will a small intervention now prevent a larger intervention in the months or years ahead?

In a video produced by the Welsh Government, social worker Lucy Powell introduces direct payments to help meet an individual's well-being outcomes.

[View transcript](#)

A Direct Payment is a way of keeping people in control of their life and empowering them to take control of their circumstances and give them choices about who provides their support and when.

There shouldn't really be anything complicated about the conversation, I'll talk to people about whether a PA might be the right thing, employing an agency might be good for them.

We're saying to people you've got the right to choose who's your provider.

So if people want to have that choice, we make sure that they get it.

Now you need some paid support, so we need to figure out who the best person is to do that, so who's the best person to come and support you at home and what that looks like.

Now, there's different ways we can do that.

One of the ways we can do that is we can ask the local authorities brokerage services to identify an agency and they'll send somebody in.

So we figure that you need half an hour most days in the week to plan your day.

But the other way we can do it is that you can have more choice about who comes in to provide your support.

So I can choose who I can get my care from?

Absolutely, that's the whole point of doing it this way, because there's all sorts of different agencies in the locality around here,

some which you might be aware of.

You might have friends or family that have used agencies before that might have had good reviews or bad reviews.

So it might be worth you having a look around and seeing if there's any provider that would be best for you.

Okay

You could invite the providers along to have a chat with them and see if there's any that you like more than others.

I know that there are certain things that are important to you, so for example whoever comes into the house has got to like Luna the dog.

Yes of course.

Because these are really important things when we ask the provider what we want.

Some providers might be able to accommodate that, some may not.

So we can rule some out straight away.

That's it yeah.

And then we can interview the best ones perhaps.

One of the benefits of doing it this way or as a direct payment would be that if you don't use your support on a certain day, for example your mum took you out or you had a hospital appointment, you could potentially bank that time.

So if I would cancel a call if I had a hospital appointment, who would I have to contact?

So there would be no need to call me, it's about you having that relationship with the provider, so it's all about you having that control

Right.

And I know that your mum and dad have been wanting to go on holiday haven't they?

So when they go away they feel very worried about leaving you so it might be that you could use those banked times for that purpose.

So that you've got that security or safety net when they're away.

With Direct Payments how does the money side work?

OK, this is called direct payments but that sounds a little misleading because it's not all about money, it's about the choice and control that you've got.

You've agreed that you'd like the choice and you'd like the control so now we need to figure out how we work the money side of things.

Ideally we'd want to give you as much control as possible.

And what that means is the money that's allocated to you would be transferred to a bank account in your name and then you could pay the provider directly.

Some people can't manage a bank account so in those cases, perhaps the local authority would pay the provider of their choice directly.

We've got a direct payments support service locally so I'll introduce you to them and they can help you to take things forward.

Great, thank you.

For me it's really important that I offer Direct Payments.

It's a no brainer for me.

It's critical that people have choice about who comes in and supports them in their own homes.

Using a direct payment can help people build a life.

Two months ago I wouldn't have been able to get out and join a choir but now I've had help and it just gives me the confidence to do it by myself again.

Mapping individual strengths

Strengths mapping is an approach which helps practitioners to understand what support is already available for people and what is missing.

It looks at what an individual can already do and what skills they have and tries to find ways of building on this.

A practitioner will talk to a person about what support needs they have and the different ways their needs can be met.

Together, they will talk about:

- what the individual can already do for themselves and what the practitioner can do to help
- what support already exists and whether or not it's suitable
- what matters to the person in supporting them to improve their well-being.

Accessing support - what is already available to the direct payment recipient?

Friends and family networks:

- what friends, family members and networks do people already access for care and support?
- are the individual, their carers and support networks happy to continue in this way or do other forms of support need to be found?

Remember, the Act is clear that carers are only carers for as long as they are able to be and want to be.

Community-based services:

- are there any suitable activities or services that can support the well-being outcomes the individual has identified?
- is support needed to access those activities or services?

What is left that still needs support?

- this is what needs to be provided using direct payments or care and support services.

We want your feedback

Help us to improve the Direct payments resource by telling us what you think about it in our short [four question survey](#).