

CASE STUDY

Patient & Public Involvement



Clinical Audit Awareness Week, 2-6 June 2025 (#CAAW25)
featuring the *Clinical Audit Heroes Awards*

www.hqip.org.uk/clinical-audit-awareness-week

Carer Engagement Through *Triangle of Care* Shropshire, Telford & Wrekin Community Mental Health

There are an estimated seven million unpaid carers in the UK, 13% of whom support people with mental health conditions. These carers can provide vital insight into the treatment and condition of those for whom they care. The Carers Trust's *Triangle of Care* (ToC) harnesses that knowledge in an alliance between unpaid carers, those receiving care, services and mental health professionals. It is based on six principles which health and care providers can use to include and support unpaid carers, staff and those receiving care:

- Carers and the essential role they play are identified at first contact, or as soon as possible thereafter
- Staff are 'carer aware' and trained in carer engagement strategies
- Policy and practice protocols regarding confidentiality and sharing information are in place
- Defined post(s) responsible for carers are in place
- A carer introduction to the service is available, with a relevant range of information across the care pathway
- A range of carer support services is available.

This project involved an audit/self-assessment, based on ToC, to improve carer engagement and monitor compliance against Trust and ToC standards. It was led by community mental health quality leads, and supported by Clinical Audit and Involvement and Co-production Teams. Carers were also involved, predominantly as part of the scrutiny panel who discussed and validated the results of the audits, and agreed the next steps.



Beenu Chaudhry, Lisa Wilson and Adrian Hill

Project Leads

- Lisa Wilson – Quality Lead, Telford and Wrekin Community Mental Health Service, Midlands Partnership University NHS Foundation Trust (MPFT)
- Steven Hazeldine – Clinical Audit Team Leader (MPFT)
- Danielle Felix - Senior Co-production and Involvement Facilitator (MPFT)
- Jennifer Lench - Quality Standards Assurance Visits (QSAV) Programme Lead (MPFT)

Project timeline

- September - October 2023 - Data collection
- April 2024 - Scrutiny Panel discussion of results
- July 2024 - Reporting date.



The Triangle of Care transformed the care of our carers...our ongoing commitment to the Triangle of Care ensures this continues to develop and evolve going forward, keeping carers at the heart of our delivery

**Head of Carer and Relative Experience,
Lincolnshire Partnership Trust**



Audit cycle

The rollout of the *Triangle of Care* 'initiative' is linked to Trust accreditation with the Carers Trust. Maintaining levels of accreditation requires ongoing self-assessment. Regular ongoing self-assessment will continue through re-audits to continue providing assurances and improve overall compliance. These self-assessments will take the form of a soft touch assessment to reduce the burden of data collection.

How did the project work?

An audit tool based on the self-assessment tools created by the Carers Trust was adapted for ease of use, including local guidelines, to support consistent data collection and facilitate meaningful benchmarking across teams. Data was collected at the end of 2023 across CMH teams, with a scrutiny panel taking place in April 2024 to consider the results and actions.

The process started with a self-assessment/audit supported by local guidelines that were developed with staff and carers. The tool provided by the Carers Trust, suggests that teams use a simple RAG rating to assess service delivery. MPFT considered each of the standards and questions and, where possible, updated the tool to require an audit of five sets of notes. This provided further consistency across all teams and increased reliability.

Results of the audit enabled benchmarking across all teams, and were shared and discussed by a 'scrutiny panel'. The panel was made up of carers, volunteers, clinical representation, the Involvement and Co-Production Team, and the Clinical Audit Team - who gave consideration to the following:

- Key messages from the results - positive and negative
- Did the results reflect what was expected and the actual experience?
- Challenges to any data that may require further explanation or evidence
- Priorities for improvement
- Initial recommendations/actions
- Further involvement in scrutinising and monitoring progress against the agreed action plan.

Carer involvement was key to the success of the audit at various stages, including:

- Participation in the scrutiny panel
- Carer awareness training is a key standard within the audit and has been a key action throughout the implementation of ToC, with generic training being adapted to suit the specific needs of different services. Carer involvement was key to the development and delivery of this training
- Involvement in the development of carer information packs.

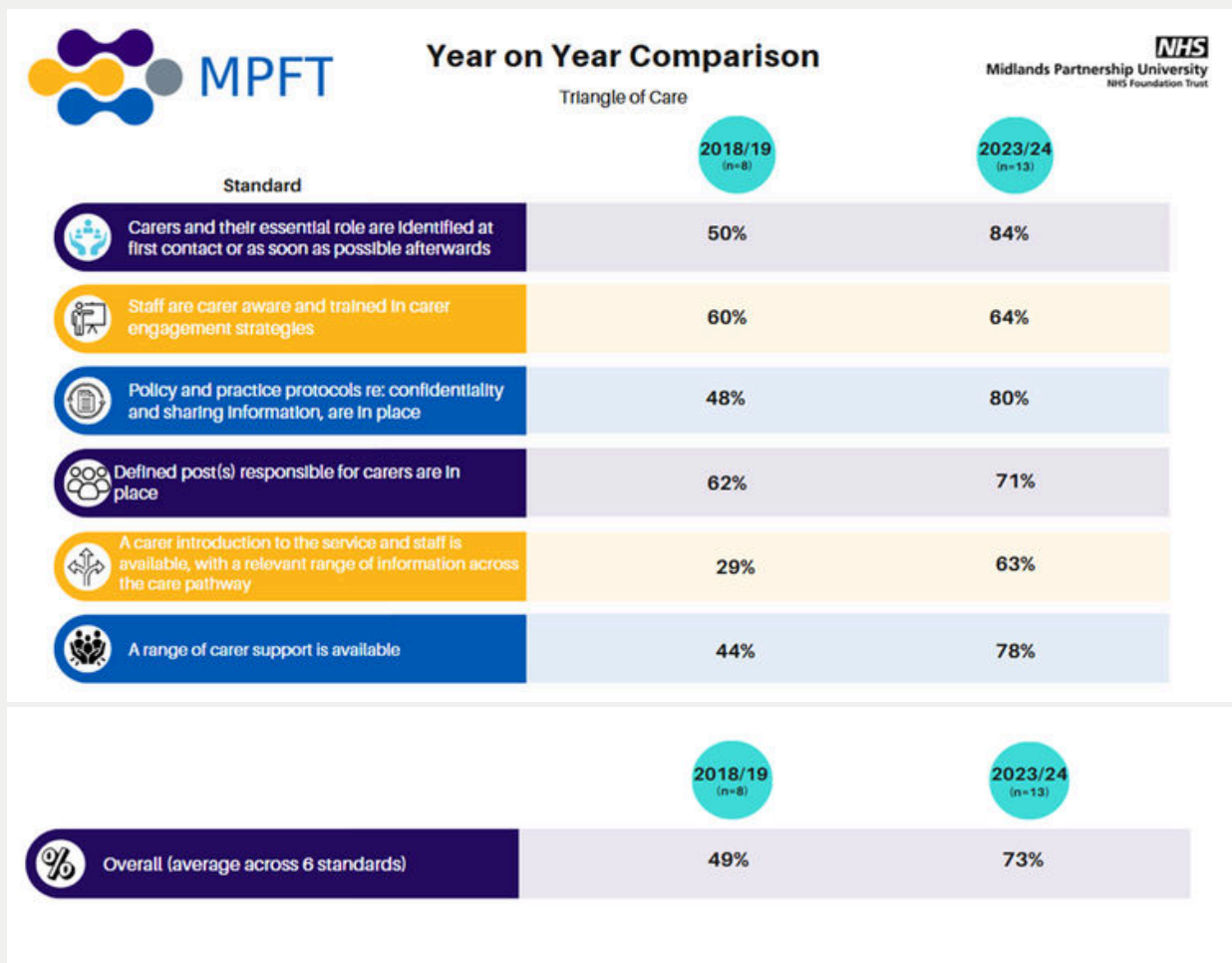
What changes to processes were implemented?

Although the audit identified good practice and provided assurance that carer engagement is a key priority for teams, areas for improvement were identified. These were discussed and addressed through an action plan. New actions/initiatives were agreed and existing practice was shared and implemented across other teams within the service. These included:

- Development of carer champion network
- Information and welcome packs for carers
- Formalising the annual carer awareness training across services
- Collaboration with local carer services
- Obtaining carer feedback – making the resource more accessible and easier to use.

The audit identified that assessment of carers' needs may be taking place but not documented. This raised questions about where information regarding carers was best to be recorded consistently across all teams, and this was also addressed in the action plan.

As with all of the *Triangle of Care* audits undertaken across MPFT, results and lessons were shared across the organisation, with actions and initiatives being adopted throughout. This was also supported by a Trust wide '*Triangle of Care Best Practice Day*', where teams shared their experiences and activities. The audit was able to demonstrate improvements against a previous audit, with overall compliance increasing from 49% to 73%. Further audit/assessment is planned to measure the impact of the latest actions and ensure carers' views and input have a positive impact on patient care.

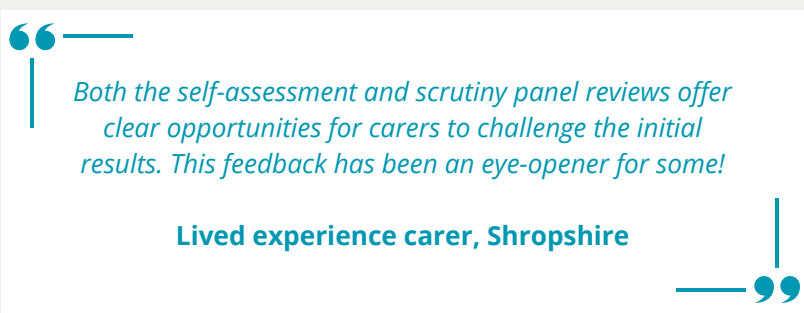


Did the project succeed and, if so, what is the evidence?

- Carers' packs are in use across the service along with feedback materials
- Carer awareness training has been updated and continues to be delivered
- A carer champion network has been established
- Work is underway to agree a standardised place for carer information to be recorded in electronic records. This action has developed to considering standardizing practice across the Trust as a whole.

A further audit/assessment is planned to take place to measure the impact of the latest actions and improvements, and ensure that carers' views and input are able to have a positive impact on patient care.

The rollout of the *Triangle of Care* 'initiative' is linked to Trust accreditation with the Carers Trust. Maintaining levels of accreditation requires ongoing self-assessment. Regular ongoing self-assessment will continue through re-audits, providing assurance and demonstrating changes in overall compliance. These self-assessments will take the form of a 'soft touch' assessment to reduce the burden of data collection, supported by agreed further ad-hoc validation of results.



Further information

- *Triangle of Care* website: <https://carers.org/triangle-of-care/the-triangle-of-care>
- Access to the full report is available internally via MPFT's Clinical Audit Platform: <https://www.mpft.nhs.uk/working-here/research-and-innovation/research-support-services/research-toolkit/my-project-research/clinical-audit>
- Further details can be obtained by contacting the project lead or the Clinical Audit Team at the following e-mail addresses:
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