

MENTAL HEALTH ISSUES: GUIDE FOR MANAGERS

**An education, training and
employment guide for careers
and advice service managers**



**This guide was produced on behalf of advice-resources by the
International Centre for Guidance Studies (iCeGS) in
association with OLM-Pavilion.**

(Last updated March 2009)





Contents

Guide for managers

	Introduction	1
1	How to develop and market services to meet the needs of clients with mental health problems	4
2	Developing work with employers	11
3	Support for staff, training and continuing professional development	14
4	References	19
5	Templates from this guide are available as separate documents in Microsoft Word	



Introduction

Guide for managers

Who is this guide for?

This guide is for those managing careers, information, advice and guidance staff (described as advisers in this guide) to support their work with adults with mental health problems. In other words, this guide is for careers and advisory service managers, team leaders, co-ordinators and others who manage and support advisers, these are also sometimes known as IAG (information, advice and guidance) services. Most managers will work in nextstep organisations and partnerships, the Careers Advice Service, higher and further education careers and advisory services, Jobcentre Plus, voluntary and community agencies, and other similar organisations.

What does the guide for managers cover?

This guide for managers complements the Mental Health Issues: Guide for Advisers. It aims to provide information for managers to enable them to develop best practice in relation to the provision of careers and advice services for clients with mental health problems. The term 'mental health problem' is used as it is the commonly accepted term currently used within the field. As there is a wide range of organisations providing careers and advice services, this guide focuses on a small range of key issues. Critical to the successful management of careers and advice services for adults with mental health problems is effective resourcing. Some organisations are able to provide in-depth services to this client group; others, with fewer resources, are only able to give superficial or referral support. This guide does not cover ways in which managers can attempt to access funding to offer enhanced services for adults with mental health problems, although further information is given in section 1 about ways to develop careers and advice services.

How should I use the guide for managers?

The guide is divided into sections on different topics, such as 'Support for staff, training and continuing professional development'. You can read the whole guide in full, or simply go to the section that you are interested in. Managers are also advised to read the relevant sections of the Mental Health Issues: Guide for Advisers. Contact details for useful organisations, networks, publications and other information are given in the Guide for Advisers. The sections of the Guide for Advisers are as follows:

What is in the guide for advisers?

- Introduction
- Mental health problems
- The relationship between learning, work and mental health
- How mental health impacts on access to careers and advice services
- The policy context
- Working with clients who have mental health problems
- Client groups with differing needs
- Specialised support – including further signposting and referrals
- Learning and working opportunities for adults with mental health problems
- Welfare benefits
- From the client's point of view
- Continuing professional development in mental health issues for advisers
- Glossary of terms and jargon buster
- Resources for further reading
- References.

Guide for clients

In addition, there is a guide to using careers and advice services for clients with mental health problems. The sections of Your Guide are as follows.

What is in the guide for clients?

- Introduction
- Glossary of terms and jargon buster
- Advice and guidance services and how they can help
- Other people's stories
- Learning, work and mental health
- Opportunities, opportunities, opportunities?
- Useful contacts
- Further reading and information

The information in this guide

The content of this guide has been informed by many individuals and expert organisations. References to many of the materials used are to be found in section 14 of the guide for advisers. The contents of this guide have been checked for accuracy. However, please note that some information may change quickly – for instance, web addresses. If you find such a change, you should inform advice-resources at ca-advice-resources@lsc.gov.uk.

Who produced this guide?

This guide was produced on behalf of advice-resources by the International Centre for Guidance Studies (iCeGS), University of Derby, in association with OLM-Pavilion. Many other organisations have been involved in the guide's development: in particular, Building Blocks Solutions Ltd, a mental health social enterprise company. This guide and the complementary guides for advisers and for clients with mental health problems will be updated regularly.

How can I give feedback?

If you have comments about this guide, please send them to:
ca-advice-resources@lsc.gov.uk.

(Last updated March 2009)



1 How to develop and market services to meet the needs of clients with mental health problems

Guide for managers

This section describes a number of strategies managers may want to use in developing their organisation to optimise its support for clients with mental health problems. It contains four parts:

- clarifying what makes clients with mental health problems distinctive
- establishing the baseline for your organisation
- developing the organisation's services for clients with mental health problems
- outline development plan.

Clarifying what makes clients with mental health problems distinctive

About a quarter of all adults experience mental health problems. Despite this fact, mental health problems are often hidden and sometimes overlooked. Adults with mental health problems often experience discrimination by others, and exclusion from services. The position of adults with mental health problems is an important part of the government's social inclusion agenda. All careers and advice services will have plenty of experience of and expertise in dealing with this client group, and examples of excellent practice abound. However, research shows that many careers and advice staff lack confidence in how to work effectively with clients with mental health problems, and feel that they lack essential knowledge and experience. Clients also report specific concerns relating to their mental health problems and careers and advice services. Some clients also experience 'double discrimination' by not only having mental health problems but also belonging to a disadvantaged group, for instance, lone parents.

In many respects the advice services available to all adults in England offer excellent support for clients who experience mental health problems. This guide aims to support managers by providing additional materials and information to inform best practice in respect to this special client group. The issues that are particularly important and sometimes distinctive to this client group include:

- confidentiality
- disclosure
- the law

- stereotyping
- clients with mental health problems often require additional and ongoing support, compared with other clients
- how and where to obtain specialist advice
- the boundaries of the adviser role.

Further information on these can be found in section 5 of the guide for advisers.

Establishing the baseline for your organisation

Policy audit

Take an audit of your organisation's policies that relate to clients and their mental health. Organisations that have recently achieved **matrix** or have undergone an inspection may find that their policies are sound; other organisations may need an update. Policies include:

- confidentiality and privacy
- compliance with relevant laws: eg. Disability Discrimination Act, health and safety, data protection
- those relating to partnership and employer networks.

Questions to consider

- Do all relevant staff (including frontline and backroom staff) understand your organisation's policies (see also section 3 of this guide, support for staff, training and continuing professional development)?
- Are there easily understood protocols for the relevant policies, for instance, about sharing information among staff, and managing information sharing with other organisations?
- Does your organisation have a confidentiality code of practice for advisers? If so, is there a similar code or protocol for other staff?
- Are existing policies fit for purpose?
- Do new policies need to be developed?
- Does your organisation have a statement of entitlement of provision or similar?
- Are your organisation's policies effectively implemented and monitored? If not, why not? How should they be monitored?

Audit of practices

Review your organisation's practices in respect of mental health issues. One way to do this is to invite a mental health specialist (possibly a client, or a member of a specialist organisation like Mind) to take a 'client journey' around your organisation. The practices you can look at might include the following:

- **Clarity** of the role of your organisation and its work for clients with mental health problems. Do staff understand their organisation's role

and their own role in relation to providing services like advocacy and counselling, as well as careers and advice services?

- **Contracting** arrangements with partner organisations.
- What **management information** do you have relating to this client group?
- **Joined-up service working** – does your organisation develop local and national networks to best serve the needs of clients with mental health problems?
- **Marketing** – does your organisation have a remit for promoting its services to specific groups of clients? If so, how does it implement this?
- **Employers** – what remit does your organisation have to work with employers to inform and develop best practice?
- **Opportunities** for clients with mental health problems. Are you and your staff aware of local and national opportunities in the voluntary sector, in social enterprises and clubhouses (see section 8 of the advisers guide for further information)?

Developing your organisation's services for clients with mental health problems

This section gives a checklist of some of the actions you can take as a manager to build the most effective service for clients with mental health difficulties. Critical to the success of activities described in this section is effective staff development and continuing professional development (CPD). Section 3 of this guide contains further information. As most managers will understand, there may be exceedingly challenging barriers related to the funding and structure of public services, but some of these can be tackled by following some of the suggestions listed in this section.

Strategic planning

- Raise issues with Learning and Skills Councils (LSCs) and management groups.
- Develop, if necessary, funding opportunities to support good practice. In essence, if you as manager want your advisers to see a client more than once, you will need to locate additional funding. In this respect, contact other similar organisations with experience of managing special mental health services for clients. It has been suggested that part of the careers and advice service manager's job is to always seek new funding.
- Explore issues with regional contacts, especially the regional development agency.
- Recruit specialist representative(s) to join the management group to steer ways forward.
- Re-assess premises, both in terms of relevant locations and client accessibility and friendliness, and also with regard to data protection legislation.
- Consider what management information your organisation has, and whether there is a need to collect more. If so, how might it be used?

- Develop relationships with specialist organisations, including the primary care trust (PCT) and mental health trusts.
- Involve clients (known as 'service users' in the mental health service) in strategic planning.

Contract development with new and existing partners

This section relates in particular to the work of the managers in nextstep organisations. At the time of updating this guide the government is working to join the services of both nextstep and the Careers Advice Service together in 2009–2010, however some of the following points will be appropriate in the short and medium term. The nextstep model in the past has focused on the development of partnerships, especially with voluntary and community organisations. In this context, managers should consider the following issues.

- Extend contracts for future years to specialist providers, allowing work in additional districts, enabling specialist organisations to provide additional staff.
- Identify and recruit new agencies that can provide specialist careers and advice services to work in partnership with your organisation. Support these new organisations and partners to achieve **matrix** where relevant.
- Consider your organisation's client referral policy in relation to specialist careers and advice service providers (if appropriate).
- Adjust your organisation's key performance indicators (KPIs) as necessary.

Resources

- Ensure that client needs for privacy can be met. This will involve developing your premises.
- Develop a workable model for adviser–client interactions. This is likely to be based on the client's need for several sessions of support from an adviser. Ensure that this delivery model is funded, as mentioned above.

Marketing

- Does your organisation have a marketing plan (or section of an organisational marketing plan) that refers to clients with mental health problems?
- Do you have a marketing pack (describing your organisation's role) for other organisations involved in mental health issues?
- Is there a marketing pack (or, perhaps, information pack) for individual clients and/or their support workers?
- Are there specific promotional materials (leaflets, fliers, website materials, or joint materials with other groups/agencies; case studies of local people, with permission) for this group?
- Have you carried out an audit of the contents of your materials, with a view to including specific support (for instance, mentioning the

possibility of client contact in a community location/home/by phone if possible and appropriate)?

- Are the organisation's materials (if any) to be found in GP surgeries and local and national mental health agencies?
- Has your organisation considered joint working with partners to produce materials that ensure potential clients know where to access support at different stages: for instance, statutory agencies, Sector Skills Councils and employer organisations?

Some safety and operational management issues

- Ensuring the safety and security of advisers and other staff is paramount. This is particularly relevant for shop front organisations. Some systems that are useful and sometimes recommended are:
 - having a chair for the adviser near to the door
 - installing a buzzer system
 - installing a panic button
 - having a code word that can be used on the phone with other staff.
- Have you considered developing a client referral card, or similar? This could have benefits for the client as an aide-memoire, but also ensures that other agencies know a little more about your work.
- The importance of regular case conferences meetings with experts and advisers.

Partnership building and mental health issues

Excellent partnerships exist nationally and locally to support clients with mental health problems. Some additional strategies to further develop such partnerships may include:

- establishing a new steering or development group, which could be related to a special initiative or change in policy. This will be particularly important in the developments in 2009 to develop the adult advancement and careers service and also strategies initiated to provide more government support for those who lose their job as a result of the 2009 recession
- further developing relationships with organisations and individuals: trade unions, business support organisations like the Institute of Directors, social service departments, specialist resources in colleges and universities, specialist services in Jobcentre Plus, like the Disability Employment Adviser (DEA), and Sector Skills Councils.

The value of personal development programmes

Many organisations have found that establishing personal development courses for adults with mental health problems who have been relatively

isolated for some time gives enormous benefits to attendees. The benefits are often:

- raised confidence, self-esteem and motivation
- making and developing relationships
- enthusiasm to take more complex learning, training and voluntary opportunities.

Outline development plan for organisations delivering careers and advice services: mental health issues

Managers may wish to use this plan, and possibly develop it further to meet local situations.

Topic	Strategic development	Marketing	Security and operational matters	Financial issues	Partnership building	Employer support	Audit policies and procedures	Contract development	Staff development	Others
What does the organisation need more of? What needs to be done?										
By whom/when?										
How to evaluate impact										



2 Developing work with employers


Guide for managers

This section focuses on some of the key issues pertinent to working with employers. It also contains an outline mental health issues action plan for employers.

Careers and advice-related organisations have different remits for work with employers. Some careers organisations:

- know which employers may be especially supportive for this client group
- know about the range of specialist employment opportunities available locally/nationally
- support clients into paid work
- support clients to continue in work
- support employers, by providing information.

Depending on their remit and resources, careers and advice organisations can:

- ensure that they have information on the  (positive about disability) employers in their area, possibly developing special projects with them
- be familiar with the specialist opportunities available (as in section 7 of the guide for advisers) for their clients
- produce a list of opportunities for clients with mental health problems (based on the information in the bullet points above); this list is likely to be available on a local basis
- have information available about specialist organisations that can support clients en route to, into and in work (as described in section 7 of the guide for advisers); many local CVS (Council for Voluntary Service) groups produce this information on a local basis
- work with local and regional business support agencies and trade unions
- develop an employers' information pack
- develop networking opportunities for their staff to meet and work with community organisations, employer groups and others; such networks can enable organisations to exchange and develop good practices
- work with employers and business support agencies to produce an action plan for employers vis-à-vis adults with mental health problems; an outline action plan is given below

- Mind produces an information pack on *Managing for Mental Health: The Mind employers' resource pack* www.mind.org.uk
- another useful source of information for employers is www.mindfulemployer.net
- establish contact with the 'Improving services for learners with mental health difficulties' regional networks (information from www.niace.org.uk/mentalhealth).

A 2008 report for the Department for Work and Pensions suggests that some employers would benefit from collecting data relevant to their own workforce on mental health issues. Support for recruitment and selection would also be useful for some employers.

Outline mental health issues action plan for employers

This is an outline plan to support developmental work with employers. It can be adapted and developed to meet local needs. A Microsoft Word template version is also available.

Topic to be addressed	Review policies and procedures, and equal opportunities statements	Raise staff awareness to the relevant legislation, including health and safety, disability discrimination, data protection	Raise awareness with all staff of important roles and responsibilities related to mental health issues	Recruiting and selection policies and practices	Induction programme for new staff	Working arrangements with individual staff	Promotion and change of role and implications	Support and management procedures	Support from other organisations	Other matters
Who is to be involved?										
What needs to be done?										
Timeline										
How should this be evaluated and reviewed?										

3 Support for staff, training and continuing professional development

Guide for managers



This section focuses on the ways in which managers can develop strong support systems for staff. It includes the following:

- clarifying the priorities
- support for the individual adviser
- training, development and continuous professional development (CPD) for advisers
- support for staff who may themselves experience mental health problems.

Clarifying the priorities

As discussed in the guide for advisers (sections 5 and 11), the following areas are particularly important for advisers.

- Be positive about clients with mental health problems, and use positive language when talking with them.
- Become familiar with some of the common mental health conditions and the common symptoms associated with them, especially those that tend to affect the client group.
- Be aware of your own organisation's policies and practices.
- Be familiar with legal and professional issues that apply to careers and advice service practice with clients with mental health difficulties, including the Disability Discrimination Act (DDA), data protection, confidentiality, disclosure.
- Develop the team's knowledge and skills on adviser/client relationships. Key issues include developing rapport, empowerment, privacy, knowing the boundaries of role, respecting the client's knowledge of their mental health problem, and action planning – but often action planning in small stages.
- Work within the boundaries of the adviser role. One area to make clear is appropriate client/adviser relationships in and out of work.
- Refer the client to others with more specialist expertise where appropriate.
- Look after yourself. It is essential that advisers have discussed and developed a range of strategies to support themselves and colleagues. These can range from finding suitable ways to express themselves

after particularly challenging client interactions (for example, take a quick walk outside) to planning strategies to meet particularly hard-to-reach clients (for example, talking to experts).

- Ensure you have the optimum type of supervisory support.

Support for the individual adviser

Organisations have different support systems. However, if people with mental health problems form a significant part of an adviser's caseload, the traditional performance management system may be insufficient to give adequate support. The following systems may be useful to supplement a conventional performance management system based (often) on six-monthly review meetings.

- Implement a supervision system for advisers. These systems may involve weekly or fortnightly supervisor/adviser meetings to discuss professional client/adviser interactions and challenges.
- Peer support systems can be useful. These can be one-to-one meetings or group support systems.
- Introduce mentoring systems, in which an adviser may have regular mentoring meetings with an experienced individual, possibly from another team or organisation.
- Organise regular case conference meetings, which may involve experts from different agencies.
- Ensure that each adviser knows who s/he can talk to prior to/following an interaction with a particularly challenging client. Advisers may need to express anger, frustration, sadness and other feelings in a supportive environment.
- Give advisers time to reflect and review their practices following any harrowing experiences.
- Consider designing and developing a basic framework of topics/questions for advisers. Most advisers do not want to be constrained by a framework of questions. There is a feeling that this would distract them from the needs of the individual client. However, some advisers may find it helpful to have a prepared list of topics to use with clients who have particular problems, for instance, clients who are reticent about talking. As an example one organisation produced a suicide awareness checklist.

Training, development and continuous professional development (CPD) for advisers

How to go about it

For the individual adviser

- Section 11 of the guide for advisers gives a CPD action plan for advisers. Managers should encourage staff to complete this, and then

work with the adviser to ensure the suggested actions can be resourced and implemented.

- Some advisers find it useful to attend counselling courses, so that they can become aware of what is 'safe' to do in practice. Advisers should not practise skills in which they are not adequately trained.
- Some adviser development can be through reading, contact with specialist organisations and by using a suitable supervision plan.

For groups of advisers

- There will be several issues on completed CPD action plans that are best developed in a group session involving several or many advisers.
- The group sessions could usefully be facilitated by experts in mental health matters from a specialist organisation.
- Training could be made compulsory for all advisers working on specific projects or contracts that involve support for adults with mental health problems.
- There could be a module on induction training for new advisers.
- One key aim of group training and development sessions could be to give staff a basic awareness of some of the key issues, like signposting opportunities and confidentiality matters, so they are reasonably confident when encountering clients with mental health problems.
- Setting professional boundaries is important and can be well-developed in a group situation. This includes developing organisational policies on adviser/client behaviour and relationships, and commitment by staff to their own CPD.
- Other critical areas for development are establishing a clear professional agreement on levels of client dependency on an adviser, and where the boundary lies between support, empowerment and dependency.

For other staff working for organisations delivering Careers Advice Services

- Managers should consider training related to mental health issues for all staff, especially frontline staff.

Content of training and development for advisers

One of the most important areas on which to develop group training and development is working with the client. This type of development training could include topics like developing rapport with clients who do not give eye contact, a review of effective motivational practices, and establishing the boundaries of the adviser role. Another topic could be how advisers can identify coping strategies, including detaching themselves from stressful situations.

Other important topics include legal issues, mental health conditions, and specialist support organisations.

A key area for managers to develop further is dealing with particularly difficult situations, such as suicide or potential suicide.

Other and non-traditional continuing professional development

Some other areas of CPD for managers to consider (sometimes involving specialist organisations) for adviser development include:

- shadowing specialists
- job swaps
- secondments
- creative use of drama
- developing new projects
- research into specific areas
- implement a working group to examine the possibility of developing a framework of topics/questions for advisers.

Support for staff who may themselves experience mental health problems

Establishing a healthy workplace is one of the key duties of a manager. Work-related ill health accounts for about 28 million working days lost per year in the UK. The Health and Safety Executive (HSE) notes that half of all work-related absences in the education sector are due to stress and mental health related issues. The mental health of all staff working in careers and advice related organisations is most important.

Managers should also ensure that their own organisation's policies are robust, and that all relevant staff are familiar with the legal position. The HSE recommends that a mental health policy should be an integral part of any organisation's health and safety at work policy.

The Social Exclusion Unit report on Mental Health and Social Exclusion notes that research in a range of companies found that only 20% managers were confident that they could manage someone with mental health problems effectively, yet 70% of managers had had to manage someone with a diagnosed mental health problem.

A 2009 report by the mental health foundation notes that most long-term sickness absence is due to mental health problems such as stress, depression and anxiety and many employers fail to support staff returning to work after suffering from depression. Line managers and HR managers were found to prefer making work adjustments for those with cancer and heart disease over those with depression, despite many of those who had experienced depression reporting high job strain and that the cause of their illness was often work related.

A useful source of further information is the CIPD information resource *Mental Health at Work*
(www.cipd.co.uk/subjects/health/mentahlth/mentalhth.htm?IsSrchRes=1)

To start to tackle this conundrum, managers may wish to:

- undertake further reading (see sections 13 and 14 of the guide for advisers)
- investigate their organisation's staff support policies and systems
- review any relevant management information
- consider their own and their fellow managers' skill levels with respect to the mental health of staff, and develop a development programme to address any weaknesses.



4 References

Guide for managers

(References are also given in the guide for advisers)

CIPD (2008) *Mental Health at Work* [online]. London: CIPD. Available from: www.cipd.co.uk/subjects/health/mentalhth/mentalhth.htm?IsSrchRes=1 [Accessed 11 March 2009].

Health and Safety Executive (2006) *Healthy Workplace, Healthy Workforce, Better Business Delivery*. [online]. London: HSE. Available from: www.hse.gov.uk/pubns/misc743.pdf [Accessed 9 May 2008].

Munir F, Yarker J, Haslam C, Kazi A, Cooper L, Mackay C and Myron R (2009) *Returning to Work: The role of depression* [online]. Loughborough: Loughborough University. Available from: <http://www.mentalhealth.org.uk/EasysiteWeb/getresource.axd?AssetID=67531&type=full&servicetype=Attachment> [Accessed 17 February 2009].

Sainsbury R, Irvine A, Aston J, Wilson S, Williams C and Sinclair A (2008) *Mental Health and Employment*. Research report No 513. London: Department for Work and Pensions.

Shift (2007) *Line Managers' Resource: A practical guide to managing and supporting people with mental health problems in the workplace* [online]. London: Shift. Available from: <http://www.shift.org.uk/employers/lmr/> [Accessed 12 March 2009].

Social Exclusion Unit (2004) *Mental Health and Social Exclusion* [online]. London: Office of the Deputy Prime Minister. Available from: <http://www.socialinclusion.org.uk/publications/SEU.pdf> [Accessed 13 February 2009].