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UNPAID CARERS PROJECT: A review of local authority websites providing Information, Advice and Assistance for unpaid carers and carers needs assessments

Association of Directors of Social Services Wales

Alyson Hoskins, Nicki Harrison, and the Local Authority Project Working Group

March 2026

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Introduction

The Welsh Government asked the Association of Directors of Social Services (ADSS) Cymru to lead a programme of work which supports national improvement in the provision of information, advice and assistance (IAA) and carers' needs assessments by local authorities. The project included the development of an Improvement Action Plan (Appendix A) to focus on the key tasks needed to bring about improvements. It did not include financial resources to implement the actions contained in the Action Plan. It builds on previous work from workshops with senior local authority leaders and conversations with colleagues from Social Care Wales, the Carers Operational Learning and Information Network and the Young Carers Professional Network. The Action Plan has also drawn on the information gathered by the Unpaid Carers Task and Finish Group through surveys with local authority staff and engagement events with unpaid carers.

The Ministerial Advisory Group for Unpaid Carers meeting in June 2025 received an update, including the key priorities that had been identified. The group acknowledged the need to establish regional representation from local authorities to take forward a range of actions and report back in due course. A Project Working Group was established and had its first meeting on 17th November 2025. This paper reports on the research carried out by this Group with key recommendations for further improvements to the information, advice and assistance provided for unpaid carers by local authorities. The project also examines what is needed to support social care practitioners who carry out the carers needs assessment process and makes recommendations and suggestions for achieving this support.

This project could not have proceeded without the commitment and support of all local authorities in Wales. The authors are grateful to everyone who gave time to contribute to the study. Special thanks are due to the members of the Project Working Group who carried out the bulk of the research and review of the priority topics, to Social Care Wales for contributing to the Project Working Group, to Carers Trust and Carers Wales who willingly gave their advice and support to this work and to the unpaid carers representatives who met with us to consider the findings of the review.

Approach

This project had several elements, all of which are dependent on the support from local authorities' care support teams. A meeting with the Carers Officers Learning and Improvement Network (COLIN), identified a willingness to support the project and work towards developing a range of improvements. The starting point was to establish a Project Working Group with representatives from the seven local authority regions (Regional Partnership Boards) in Wales. All 22 local authority social care departments engaged with the process and identified key contacts to represent them at the monthly Project Working Group meetings.

This Group reviewed the Improvement Action Plan and recognised that while it is ambitious and the timescales for this project were short, there were tasks that could be carried out to identify the improvements needed. To make the most of the resources available and to deliver by the end of March 2026, the Group identified key priority areas for further research and review. The scope of the project was restricted to adult carers on the understanding that any findings would be able to be shared with, and applied to, the young carer sector at a future date.

At the first meeting, all local authorities were asked to provide examples of what they deemed to be notable practice within their region. A summary of this notable practice is contained in Appendix B and is a useful resource for officers working in the sector. There was not enough capacity within the project to confirm whether these examples are the best in class. However, the discussions that emerged from the collation of the information identified examples of documents and signposting to other useful sources of information. Local authorities have already started to apply this sharing of information to their local arrangements to improve services.

Following discussions about notable practice and gaps in support, seven priority areas were identified as needing further research. Members of the Project Working Group volunteered to research these areas in more detail. Research questions were developed and each topic was reviewed to provide an overview of the current position in local authorities. Recommendations for actions that would bring about further improvements in the Information, Advice and Assistance provided for unpaid carers and the carers needs assessment process were also suggested.

The seven priority action topics identified for further review are:

- **Priority Topic 1: Information, Advice and Assistance:** Review of local authority websites to identify best practice for signposting carers to Information, Advice and Assistance.
- **Priority Topic 2: Review of the resources provided by the third sector in Wales,** to assist practitioners in carrying out assessments.
- **Priority Topic 3: Review the 'working with unpaid carers' resources and training materials on the Social Care Wales website** to assist practitioners in carrying out assessments
- **Priority Topic 4: Recording of information on conversations with carers**
- **Priority Topic 5: The standard terminology** currently used for carrying out a carer's needs assessment.
- **Priority Topic 6: Direct Payments for Unpaid Carers**
- **Priority Topic 7: Training and qualifications** for social care practitioners carrying out assessments.

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Table 1 sets out the seven topic areas with suggestions for the focus of the review and research. Project Working Group members were assigned a topic each and worked in pairs or threes to research the given topic in more detail.

Feedback headings were provided in advance so that the reports back followed a consistent format. Headings suggested included:

- An overview of the topic
- What works well?
- What could be better?
- Conclusions
- Recommendations for improvement.

Table 1: Prioritised topics for further research

No.	Topic	Suggested areas for the review/Task
1	Information, Advice and Assistance: Review a sample of local authority websites to identify best practice for signposting carers to Information, Advice and Assistance. A list of useful links to signpost for Adult and Young carers would be a useful product for this topic.	<p>Review social care websites, First Point of Contact to assess how easy is it to find information from a social care practitioner perspective, in signposting carers to the site.</p> <ul style="list-style-type: none"> • Is the information clear and easy to understand? • Is the carer signposted to useful resources? • What resources is the carer signposted to? • Which websites are good? What makes them good?
2	Review the resources provided on the Carers Wales website and other websites of third sector providers in Wales, to assist practitioners in carrying out assessments: [Resources include Good Practice Principles for social workers and Having Conversations with Carers]	<ul style="list-style-type: none"> • How easy are these resources to navigate? • Do they provide the information needed to help an officer carry out a Carers Need Assessment? • Are there any gaps in resources? • What else would you like to see included in good practice guidance for officers carrying out Assessments?
3	Review the Working with Unpaid Carers resources and training materials on the Social Care Wales website to assist practitioners in carrying out assessments:	<ul style="list-style-type: none"> • How easy is it to navigate? • Does it assist you with the information needed to carry out a Carers Need Assessment? • Are there any gaps? • Is there anything else you would like to see included in training resources, e.g. video examples of conversations with social care practitioners who are familiar with carrying out assessments?
4	Recording of information on Conversations with Carers:	<ul style="list-style-type: none"> • When does an Assessment start? • What should be recorded – What matters conversation/ full carers assessment or both? • Where is the information held?

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No.	Topic	Suggested areas for the review/Task
		<ul style="list-style-type: none"> Who needs to record information e.g. First Point of contact officers? Should there be a consistent format across Wales for recording information?
5	Consider the standard terminology currently used for carrying out a Carers Needs Assessment: [Information reported to the Ministerial Advisory Group by Carers Wales on Terminology may assist with this topic]	<ul style="list-style-type: none"> Review of the paper prepared by Carers Wales. What are the key phrases that would benefit from standardised terminology? Would a standardised approach be useful?
6	Direct Payments for Unpaid Carers	Review resources available to support social care staff in helping carers access Direct Payments. [Good practice information provided by local authorities will assist with this task].
7	Training and qualifications for Social Care Practitioners carrying out assessments:	<ul style="list-style-type: none"> What is the conflict between the Code of Practice and the legislation? Who needs to be trained? What do we mean by competency? What is the approach of some LA's in outsourcing to third sector assessors? Qualifications/competency? Should only level 4 officers carry out an Assessment? Are there other options, such as sign off by level 4? What type of training is best practice/ how often? What recommendations could be made to Welsh Govt to provide clarity on training, qualification, competency and proportionality?

Summary of findings from research/review of topic areas

All Project Working Group members fully embraced the review and research of each of the seven topics and provided summary reports of their findings. These full reports are contained in Appendices C to I.

A summary of the findings from the review of each topic are included in this report to assist with understanding of the key points. The paragraphs below contain overall findings for each topic, together with examples of what works well, or needs to be improved, with conclusions and specific suggestions/recommendations in line with the Project Working Group's review.

Priority Action Topic 1: Information, Advice and Assistance

The review of local authority IAA assessed the quality, clarity and accessibility of carers' information provided by all 22 Welsh local authorities. The analysis focused on navigation, assessment of the information, external signposting, tone, and overall content quality of local authority websites. The findings highlighted significant variation, with examples of strong practice alongside areas requiring substantial improvement. Appendix C contains the findings of the review of each local authority's website.

Overall Findings

Almost all councils provide some useful information for unpaid carers, but the quality, structure and accessibility of this information vary widely. While several authorities offer clear, supportive and well-organised content on their websites, others rely on outdated pages, poor navigation or minimal information. IAA across local authorities is inconsistently presented, and some carers may struggle to identify who to contact or how to access early help.

What works well?

- Several councils demonstrate strong structure and clarity, particularly **Carmarthenshire, Ceredigion, Vale of Glamorgan** and **Bridgend**.
- There are good examples of external partnership working, especially **Flintshire** and **Bridgend**.
- While this project has not specifically looked at information provided for young carers, the review found that some local authorities provide good young carers information and practical resources.
- Several councils use clear navigation menus or tile-based layouts that improve user experience.

What could be better?

The findings highlight:

- IAA visibility is inconsistent or missing in some councils, leaving carers unclear about where to seek early help.
- Navigation is a major barrier, with long, text-heavy pages or hidden content.
- Out of date information. Several councils' websites need updating, so that the IAA provided for unpaid carers is clearer and easier to navigate.
- External signposting varies significantly, with some councils offering several links and others providing minimal or repetitive lists.
- Tone and accessibility differ widely; some pages feel warm and supportive, while others feel formal or clinical.

Cross-Wales Themes

- Websites tend to focus more on assessment rather than preventative IAA.
- Limited use of visuals, making pages dense and harder to read.

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- Inconsistent terminology and duplication across pages.
- Variation in how local authorities explain external links or community resources.

Conclusions

There is strong practice across Wales in providing IAA for unpaid carers. However, there is also inconsistency in the information being shared on websites. By improving IAA visibility, navigation, content quality and external signposting, local authorities can create clearer, more supportive and more accessible information for unpaid carers. The Project Working Group considered that there may be an issue for some local authorities with the constraints applied by corporate communications standards. This limits the creativity and design of pages, so that they are not as easy to read. It may also present barriers to the quick access to updating website pages. Several suggestions for improvement have been included in this section of the report. Implementing these would help ensure that all carers receive timely, accurate and compassionate support, regardless of where they live.

Suggestions for Improvements

The Project Working Group have made the following suggestion to improve the provision of IAA for unpaid carers via local authority websites:

- Each local authority review the IAA provided for unpaid carers on their website, refer to the information contained in Appendix C and the good practice examples given in this report (Appendix B) to learn from others, promote consistency, raise standards and further improve the provision of IAA.

Other specific suggestions to assist local authorities with making improvements their websites are:

- Strengthen IAA visibility with a clear, consistent entry point and contact details on every carer page.
- Improve navigation and structure, using menus or tiles and breaking long pages into themed sections.
- Introduce visuals and accessible formatting to improve readability and engagement.
- Provide clear, up-to-date assessment information, including how to request support.
- Enhance external signposting, with context for each organisation and consistent use of key information sites such as Carers Wales, Dewis Wales.
- Implement regular content reviews to ensure accuracy and up to date information.
- Reduce duplication and improve coherence across pages.
- Adopt a warm, supportive tone that welcomes carers and encourages engagement.

Priority Action Topic 2: Review the resources of third sector providers

The review of this topic examined the resources available from major third sector organisations in Wales—primarily Carers Wales, Carers UK, Carers Trust, Carer Aware, Citizens Advice, and Age UK. This aimed to determine how effectively they support practitioners in carrying out carers needs assessments. Much of the information provided by these organisations is rightly aimed at carers, not at practitioners. That said, some of the resources available provide helpful information on carers needs assessments from the perspective of carers and the organisations that seek to represent and support them. This information is helpful for local authorities to use in the signposting on their websites, promoting IAA. Appendix D contains the table of research with more detail on the findings from this review.

Overall Findings

Across third sector organisations, resources are generally easy for carers to navigate but offer limited practical value for practitioners. The emphasis on some sites is for healthcare professionals and not social care. Some of the material provided may create unrealistic expectations by implying that certain services will automatically be provided following a carers needs assessment. For example, one factsheet lists help with getting around, taxi fares, driving lessons as potential support, which could give the impression that these services will automatically be provided by the local authority. Guidance for practitioners is not so easy to find, and often assumes assessors are qualified social workers. Carer Aware (Carers Trust Wales and Carers Wales) offers training for social care practitioners. Although the information on the website is not easy to find. In the past this has included face to face training with an unpaid carer present.

What works well?

- Most of the resources provided by third sector organisations are aimed at carers, not practitioners and this provides useful background information for social care practitioners. It is also helpful information for local authorities to signpost carers to on their websites.
- Videos and factsheets are visually engaging, easy to understand, and cover rights, processes, and available support.
- Clear explanations of assessment rights: Carers Trust and Carers UK provide straightforward descriptions of carers' entitlements and the purpose of assessments.
- There are useful elements within Carers Wales materials: The 'Good Practice Principles' and 'Having Conversations with Carers' place an emphasis on empathy, strengths-based practice, and reflective questioning giving helpful prompts for social care practitioners.

What could be better?

The findings highlight:

- There is limited information on how to conduct carers needs assessments from a practitioner's perspective. The information that is available is not easy to find. Many social care practitioners were unaware that this information is available for their use.
- There is a risk of raising unrealistic expectations due to examples of support that may not be statutory or routinely available.

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- Some materials imply that only social workers undertake carers needs assessments, which does not reflect practice across Wales and again may raise expectations on who will carry out the assessment.
- Limited Wales-specific content: Some third sector sites rely on UK-wide information, which may not directly relate to the position in Wales.

Conclusions

The third sector provides valuable, accessible information for carers, some of this information is UK-wide and may not directly relate to the position in Wales. There is limited information available for practitioners undertaking carers needs assessments and this is not easily accessible. Some materials for carers may raise expectations about what support local authorities must provide, this may not always be relevant and may make it more difficult for practitioners when they carry out the assessment. Conversations with carers support organisations have been positive and they have expressed a willingness to work with local authorities to improve the materials they use for carers needs assessments.

Suggestions for Improvements

The Project Working Group have made the following suggestions for local authorities to improve the training resources for practitioners carrying out carers needs assessments:

- Review the information contained in Appendix D and use this information on their local authority IAA webpages to signpost carers to the relevant support pages.
- Work with Social Care Wales and third sector organisations to suggest improvements in the accessibility of materials for practitioners.
- Suggest changes to the examples of support provided for carers on the third sector websites to avoid implying guaranteed service provision so that these reflect proportionality.

Priority Action Topic 3: Review the Working with Unpaid Carers resources and training materials on the Social Care Wales website

This review evaluated the Social Care Wales “Working with Unpaid Carers” resources and associated training materials to determine how effectively they support practitioners in carrying out carers needs assessments. The information reviewed covers webpages, training manuals, slide decks, self-training workbooks, practitioner toolkits, e-learning modules, and linked research documents. The research highlighted accessibility, relevance, accuracy, and practical usefulness for frontline staff. Some of the resources considered were described as ‘text heavy’ and ‘not accessible’. There were some broken links to documents and outdated content. Appendix E contains the table of research with more detail on the findings from this review.

Overall Findings

Social Care Wales provides a wide range of materials, but their quality, accessibility, and relevance vary significantly. Some resources are comprehensive and well-structured, such as the Practitioner Toolkit, while others are outdated, inaccessible, or not directly related to carers needs assessments. Several links do not work, including e-learning modules and embedded videos. Many documents were created in 2018–2019 and require updating to reflect current legislation and good practice. Navigation issues and summaries of information could be clearer to make it easier for busy practitioners to quickly locate essential guidance.

What works well?

- There are some comprehensive training materials offering detailed guidance on assessment practice, legislation, communication skills, and reflective exercises.
- Some documents have a clear structure, such as the Practitioner Toolkit with a hyperlinked index.
- There are useful context and case studies supporting practitioner understanding.
- The coverage of underpinning legislation and assessment principles is clear.
- Training slides include both English and Welsh content.

What could be better?

The findings highlight:

- Broken or inaccessible links, including e-learning modules and embedded videos.
- Outdated materials created in 2018–2019, not reflecting new legislation such as the Carer’s Leave Act 2023.
- Text-heavy and lengthy documents reducing accessibility.
- Lack of clear, practical, step-by-step carers needs assessment guidance on landing pages.
- Navigation challenges, including information posted for social workers despite many assessors not being social workers.
- The information does not reflect the role third sector organisations have in undertaking assessments on behalf of some local authorities.

Conclusions

Social Care Wales offers a substantial collection of resources for practitioners carrying out assessments. Some resources were found to be inconsistent in quality, accessibility, and relevance to carers needs assessment practice. Practitioners suggested that they found the materials difficult to use because of some broken links, outdated content, and overly long documents. The resource hub would be more useful if it was more concise, practical, and easily accessible access to the main webpage could be improved to increase its value for frontline staff.

Suggestions for Improvements

The Project Working Group have made the following suggestions to improve the training resources for practitioners carrying out carers needs assessments:

- Social Care Wales should review the information prepared by the Project Working Group and contained in Appendix E. This was prepared with a positive mindset to assist with the review that Social Care Wales is conducting.
- Specific improvements to the training resources could include:
 - Repair or remove broken links.
 - Ensure all videos and e- learning modules are working.
 - Create concise, practical carers needs assessment guidance on the main webpage.
 - Provide clear summaries and quick-read versions of lengthy documents.
 - Develop practitioner-focused videos showing real carers needs assessment conversations.
 - Include links to national initiatives such as Carer Aware and Carer Friendly.
 - Replace outdated research documents with current reports such as State of Caring.

Priority Action Topic 4: Recording of information on conversations with carers

This review explored how local authorities in Wales record information relating to conversations and assessments with unpaid carers. It examined when an assessment formally begins, what information must be recorded, where records are held, who is responsible for recording, and whether a consistent national format should be adopted. The topic is rooted in statutory duties under the Social Services and Well-being (Wales) Act 2014, which states that “*where it appears to a local authority that a carer may have needs for support, the authority must assess,*” meaning an assessment effectively begins at the first meaningful conversation. Appendix F contains more detail on the information gathered during this review.

Overall Findings

Legislation provides clear expectations for what must be recorded, including the carer’s ability and willingness to continue caring, personal outcomes, work/education considerations, information provided, and proposed support. However, practice varies across Wales. Some information is captured informally at first contact, while more recording occurs during a formal carers needs assessment. Digital recording systems differ between authorities, which adds to the complications of providing one recording solution for Wales. Some carers report not realising they have undergone an assessment and evidence from one local authority showed multiple referral routes and variable recording practices, with Care Inspectorate Wales noting that “*some carers were unaware they had undergone an assessment.*”

What works well?

- Clear legislative framework specifying required content, written records, consent, proportionality, and review processes.
- National Assessment and Eligibility Tool providing a consistent “core data set” across Wales.
- Recognition that assessment begins early, with initial “What Matters” conversations forming part of the assessment journey.
- Multiple access routes for carers, with highly motivated supporting staff including social care practitioners, community connectors and third sector staff.

What could be better?

The findings highlight:

- Inconsistent recording practices, particularly at first point of contact, leading to carers repeating their story.
- Carers not always informed that an assessment has taken place, indicating gaps in communication and documentation sharing.
- Variation in digital systems (e.g., WCCIS, Mosaic, local CRMs) limiting consistency and portability.
- Lack of clarity for carers that support may begin before a formal carers needs assessment.
- Unclear recording responsibilities among staff involved in early conversations.

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Cross-Wales Themes

- Assessment begins earlier than many practitioners realise.
- Need for consistent principles for Wales-wide recording of expectations, especially for first-contact staff.
- Carers often have to repeat their story due to gaps in information flow.
- Variation in digital systems affects continuity.
- Communication gaps mean carers may not recognise when an assessment has taken place.
- Legislative requirements are clear, but operational practice varies significantly.

Conclusions

Recording of information about carers is grounded in legislation, but its application and practice across Wales is inconsistent. Early conversations are not always captured in a way that supports continuity, and carers may be unaware that an assessment has begun. While the National Assessment and Eligibility Tool provide a foundation for consistency, variation in systems, processes, and staff responsibilities creates gaps. The most important issue in the view of the Project Working Group is the need for a clearer, more unified approach to recording across all stages of the carer journey.

Suggestions for Improvements

The Project Working Group have made the following suggestions to improve the recording of information about unpaid carers.

- Strengthen training for first-point-of-contact staff on recording responsibilities and legislative requirements.
- Produce clear guidance of what needs to be recorded in terms of a carers needs assessment to remove the inconsistencies across Wales. This guidance should include:
 - Details of the way information is recorded for all stages of the carer journey, including first contact. The recording principles will be standard, but the system used will be specific to each local authority dependent on the digital system they use to record information.
 - Clear communication to carers that support begins with early conversations.
 - A mechanism to ensure that carers receive a copy of their assessment record in all cases.
 - Information provided for carers to ensure they understand the purpose and process of carers needs assessments, including a conversation about whether the carer is willing and able to carry on with this role.

Priority Action Topic 5: The terminology used for carrying out a carers needs assessment.

This review examined the terminology used across Wales in relation to carers needs assessments, advice, and information. It identifies key terms that require standardisation, explores how inconsistent language affects carers' understanding and engagement, and considers the benefits of a unified approach. Evidence from carers, Ombudsman reports, and national organisations shows that unclear or inconsistent terminology contributes to confusion, anxiety, and a “postcode lottery” of experience. Appendix G contains more detail on the information gathered during this review.

Overall Findings

There is significant variation in how terms are used across local authorities and partner organisations. Carers often report feeling overwhelmed by jargon, unclear about processes, and unsure where to begin their journey. Some practitioners reported that the term *Carer's Needs Assessment* had been described as being judgemental or implies scrutiny of a carer's ability to provide care. Existing glossaries and guidance vary in quality and accessibility, and young carers find professional terminology off-putting. There are, however, examples of clear language and good practice across Wales. The research carried out identifies a range of terms that would benefit from explanation in a standard Glossary of Terms with a clear explanation of their meaning.

What works well?

- Recognition across organisations that terminology needs to be clearer and more consistent.
- Existing good-practice examples, including glossaries from Carers Wales and accessible materials for young carers.
- Evidence-based understanding of how language affects engagement, including findings from the Ombudsman (2024) and Track the Act (2024).
- An example from one local authority, 'The Memory Service' demonstrating how terminology can be used effectively.
- Commitment from practitioners and organisations to improve communication and reduce jargon.

What could be better?

The findings highlight:

- Significant variation in terminology between regions, services, and partner organisations.
- Carers report confusion about terms such as assessment, *support plan*, *What Matters conversation*, and *eligibility*.
- Lack of a standardised introductory information pack for new carers across Wales.
- Varied job titles (e.g., Carers Officer vs. Support Coordinator) create uncertainty about roles.
- Professional language can be inaccessible, particularly for young carers or carers unfamiliar with social care systems.

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- No single, Wales-wide glossary or terminology guide currently exists.

Cross-Wales Themes

- Carers experience a “postcode lottery” in terminology and documentation.
- Jargon and inconsistent language reduce understanding and confidence.
- Young carers are particularly affected by inaccessible terminology.
- Multiple organisations use different definitions for the same terms.
- Standardisation would support clarity and legislative compliance.
- Existing good practice can be built upon to create a national approach.

Conclusions

There is considerable evidence that terminology used in carers’ information and assessments can cause confusion and deter engagement. Clearer, more consistent terminology would improve the carer experience, reduce anxiety, and support better communication between carers and practitioners. Standardisation would also improve data quality and strengthen person-centred practice across Wales.

Suggestions for Improvements

The Project Working Group have made the following suggestions to improve the use of the terminology used in unpaid carers assessments.

Local Authorities should:

- Build on the research carried out during this review and develop a national, standardised terminology guide for use across all Welsh local authorities.
- Establish a focus group with carers to co-produce the terminology used to ensure clarity, accessibility, and relevance.
- Create a basic introductory information pack that local authorities use to assist new carers explaining key terms, roles, and processes.
- Promote simplification and reduce jargon in all public-facing materials, including the IAA provision on local authority websites.

Priority Action Topic 6: Direct Payments for Unpaid Carers

This review explores the resources, guidance, and support available to help social care practitioners assist unpaid carers in accessing Direct Payments. It examines national frameworks, local authority practice, reported barriers experienced by carers, and the clarity of information available across Wales. The evidence highlights both strong examples of flexible, person-centred practice and significant inconsistencies in how Direct Payments for carers are communicated, offered, and managed. Appendix H contains more detail on the information gathered during this review.

Overall Findings

Direct Payments for carers are well-established in legislation and supported by national guidance, including the Social Services and Well-being (Wales) Act 2014, the Code of Practice, and the Charter for Unpaid Carers. Across Wales, many local authorities provide clear information, practical tools, and dedicated support services to help carers understand and use Direct Payments.

The review has found that practice is inconsistent. Some authorities offer comprehensive guidance, welcome packs, and specialist support teams, while others provide minimal or unclear information. Carers have reported that they frequently struggle to understand eligibility, responsibilities, and the distinction between Direct Payments for themselves versus for the cared-for person. There are also inconsistencies in rules such as whether Direct Payments can be used to pay relatives. Workforce confidence varies, and practitioners report ambiguity in recording, guidance, and expectations.

Despite these challenges, strong examples from Torfaen, Flintshire, Conwy, Pembrokeshire, and others show that flexible, creative, outcomes-focused Direct Payments can significantly improve carers' wellbeing and sustain caring roles.

What works well?

- National guidance provides a clear legal foundation for offering Direct Payments.
- Several local authorities provide excellent, accessible resources (e.g., Flintshire's welcome booklet, Denbighshire offers web guidance and downloadable resources with examples of carers getting together to pool Direct Payments, Ceredigion's Direct Payment hub, Cardiff's commissioned support service, Powys's provides on-line guidance, supporting carers).
- Strong examples of flexible, creative use of Direct Payments to support carers' wellbeing (e.g., Tai Chi, leisure activities, short breaks, equipment, driving lessons).
- Both Carers Wales and Citizens Advice were found to offer clear, practical guidance on Direct Payments tailored to Wales.
- Direct Payments can reduce reliance on traditional services and improve the sustainability of caring arrangements.

What could be better?

The findings highlight:

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- Inconsistency across Wales in how Direct Payments for carers are offered, explained, and administered.
- Carers often misunderstand eligibility, responsibilities, and the difference between Direct Payments for themselves vs. the cared-for person.
- Public-facing information varies widely in quality and accessibility.
- Ambiguity around rules such as paying relatives, employer responsibilities, and demonstrating alternatives before approval.
- Practitioners report inconsistent guidance, recording expectations, and confidence in offering Direct Payments.

Cross-Wales Themes

- Strong appetite for flexible, creative use of Direct Payments.
- Significant variation in public-facing information and practitioner guidance.
- Carers experience confusion about eligibility and responsibilities.
- Workforce confidence varies, particularly around employer-related aspects.
- Inconsistencies in rules (e.g., paying relatives) create inequity.

Conclusions

Direct Payments have the potential to significantly improve carers' wellbeing, resilience, and ability to continue caring safely and sustainably. However, inconsistent practice, unclear communication, and variable guidance create barriers for practitioners. A clearer, more consistent national approach would, improve understanding, and strengthen workforce confidence.

Suggestions for Improvements

The Project Working Group have made the following suggestions to improve the Direct Payments Process for Unpaid Carers:

- Consider the development of specific national guidance for Unpaid Carers Direct Payments, including clear eligibility criteria and practical examples. This could address the areas of inconsistencies, e.g. payments for relatives.
- A plain English/Cymraeg leaflet explaining that Direct Payments are available for carers, to include how they work and typical uses, with information on how to access support. It should also be offered in other languages as required. This information would be helpful for carers and practitioners.
- The training resources for social care practitioners could include information on the offering and explaining Direct Payments for unpaid carers.
- Opportunities for pooling Direct Payments could be further explored.

Priority Topic 7: Training and qualifications for Social Care Practitioners carrying out assessments

This review examines the training, qualifications, and competency requirements for social care practitioners who carry out carers needs assessments. It explores the relationship between legislation and the Code of Practice, who should be trained, what “competency” means in practice, the role of third-sector assessors, and whether assessments should be restricted to Level 4 practitioners. The review also considers best-practice training models and identifies areas where Welsh Government could provide greater clarity. Appendix I contains more detail on the information gathered during this review.

Overall Findings

The Social Services and Well-being (Wales) Act 2014 requires assessments to be completed by someone with the “appropriate skills, knowledge and competence,” but does not specify qualification levels. In contrast, the Code of Professional Practice emphasises professional qualifications and high standards of conduct. This creates ambiguity about who is formally “competent” to undertake carers needs assessments.

Local authorities vary in their approach. Some rely on Level 4 practitioners, while others use Level 3 staff for preventative conversations or outsource assessments to third-sector organisations. Outsourcing can increase capacity but can introduce inconsistency in training standards unless robust quality assurance is in place. The complexity of carers’ circumstances also makes it difficult to pre-determine whether a case is “simple” or “complex,” limiting the usefulness of rigid level-based models on who carries out each assessment.

Best practice emphasises clear training pathways, consistent competency expectations, and strong supervision. Mandatory training on legislative duties, eligibility, safeguarding, and “What Matters” conversations is essential, alongside specialist training on carer stress, wellbeing, and risk. Regular reflective supervision and continual professional development (CPD) are also reported as being important.

What works well?

- Legislation provides a clear foundation for proportionate, strengths-based assessments.
- Many local authorities already provide structured training on the requirements in the Social Services and Well-being (Wales) Act 2014, eligibility, and “What Matters” conversations.
- Outsourcing to third-sector organisations is beneficial in some local authorities and can increase capacity and improve early intervention.
- Good practice examples highlight the value of clear competency frameworks and quality assurance processes.
- Recognition across the sector that training must be consistent, role-appropriate, and regularly refreshed.

What could be better?

The findings highlight that:

- Ambiguity between legislation and the Code of Practice creates uncertainty about who is “qualified” to assess carers.

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- Lack of clarity around the expectations for the training, qualifications and competency of practitioners carrying out assessments.
- Inconsistent training standards across local authorities and third-sector providers.
- Difficulty determining complexity at first contact, making allocation of assessments difficult to predict.

Cross-Wales Themes

- Confusion about qualification levels and competency expectations.
- Variation in training quality and frequency across local authorities.
- Outsourcing increases capacity but can introduce inconsistency without strong quality assurance.
- Strong appetite for clearer guidance and clarification at a national level.
- Need for consistent CPD and reflective supervision across all practitioner levels.

Conclusions

There is a clear need for greater national clarity on training, qualifications, and competency for practitioners completing carers needs assessments. While legislation emphasises skills, knowledge, and competence, the Code of Practice places stronger emphasis on qualifications and professional standards. This creates uncertainty for local authorities and practitioners. A consistent, Wales-wide approach would strengthen practice, improve quality, and ensure carers receive equitable, high-quality assessments regardless of where they live.

Suggestions for Improvements

The Project Working Group have made the following suggestions to improve clarity around the training, qualifications and competency requirements for practitioners carrying out assessments:

- Further guidance could be produced which would help to resolve the issues set out in Appendix I. This should include clear direction on what levels of training, qualifications or competency are acceptable for a practitioner carrying out an assessment, together with appropriate supervision or sign-off levels if this is applicable.
- There should be a minimum level of training for all practitioners carrying out assessments and this would include the Social Services and Well-being (Wales) Act 2014 duties, eligibility, “What Matters” conversations, and carer-specific needs (including ability and willingness to be an unpaid carer).
- Those local authorities that choose to outsource assessments to a third-sector organisations should have an overview of the training of the staff carrying out the assessments including qualification expectations, required training and quality assurance standards.
- Strengthen supervision systems in both local authority and third sector settings to ensure reflective, consistent practice across Wales and that practitioners are supported in this role.

Overarching Conclusions

The Unpaid Carers Project has brought together all 22 local authorities, to examine how IAA and carers needs assessments are currently delivered across Wales. The work undertaken by the Project Working Group demonstrates a strong collective commitment to improving the experience of unpaid carers and strengthening the consistency, clarity and quality of support available to them.

The Improvement Action Plan (Appendix A) was developed following extensive consultation and included a range of actions identified as needed to improve local authority Information, Advice and Assistance provision and support for social care practitioners who carry out carers needs assessments. This is an ambitious Action Plan and it was agreed that not all areas could be reviewed within the resources available for this project. Seven priority topic areas were identified for further review.

Across all seven priority topics, several clear themes emerge. While there is much good practice across Wales, local authorities vary in how they present information, how assessments are recorded, how terminology is used, and how practitioners are supported through training and resources. This variation creates what has been described as a postcode lottery for carers, who may receive different levels of clarity, support and communication depending on where they live.

This study highlights that information, advice and assistance provided by local authorities for unpaid carers can be complex, inconsistent or ambiguous. Some local authority websites have unclear structures, use inaccessible terminology, or a lack of transparency about assessment processes. It can be difficult for carers to understand where to begin, what to expect, and what their rights are. Improving clarity, accessibility and tone across all forms of communication is essential to ensuring that carers feel recognised, supported and empowered.

There are examples of notable practice across local authorities in supporting carers. There are also examples of local authorities that have good IAA provision delivered through their council websites with signposting to accurate and up to date information. This project has highlighted those areas of notable practice, and this has formed a useful basis for others who need to carry out further work to improve their IAA provision.

The findings identify a need for greater coherence and alignment between local authorities, national bodies and third sector organisations in the provision of materials to assist practitioners who are carrying out carers needs assessments. While many organisations provide valuable information, guidance and tools, these are not always easy for practitioners to locate, nor are they consistently Wales-specific. Some materials are outdated, difficult to navigate or risk raising unrealistic expectations. Strengthening collaboration between sectors will help ensure that carers and practitioners receive clear, accurate and aligned information.

The importance of early conversations and the need for consistent recording practices is also identified. Legislation is clear that an assessment begins when it appears a carer may have needs for support, yet operational practice varies widely. Carers may not always realise that an assessment has taken place, and information is not always recorded or shared consistently. A national approach to recording would support continuity, reduce repetition for carers, and improve data quality. This would include conversations at the first point of contact with local authorities.

There is considerable evidence that terminology used in carers' information and assessments can cause confusion and deter engagement. Clearer, more consistent terminology would improve the carer experience, reduce anxiety, and support better communication between carers and practitioners. Standardisation would also improve data quality and strengthen person-centred practice across Wales. The review has identified certain key words and phrases that would benefit from the use of standard terminology and a guide that clearly sets out this terminology would be

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useful, especially if it is widely adopted by practitioners across Wales. For this to be accepted and more meaningful the development of this guide should be coproduced with unpaid carers representatives.

Direct payments have the potential to significantly improve carers' wellbeing, resilience, and ability to continue caring safely and sustainably. However, inconsistent practice, unclear communication, and variable guidance create barriers for both carers and practitioners. A clearer, more consistent national approach would improve understanding, and strengthen workforce confidence. Some local authorities are already making good use of direct payments to support unpaid carers and have seen the benefits this brings. They have produced clear guidance on their use and are willing to share their experiences with others to bring about a more consistent positive approach to direct payments across local authority areas.

This project's review of the Social Care Wales website and training resources found that while it offers a substantial collection of resources for training practitioners, they are inconsistent in quality, accessibility, and relevance to practice. Practitioners face barriers to accessing information, such as broken links, outdated content, and overly long documents which are in need of a refresh. Social Care Wales have been part of the Project Working Group and welcomed the review of the website and the training resources provided for social care practitioners. They are also carrying out an internal review of these resources and this project's findings will support that review.

Finally, this study emphasises the need for clearer guidance on training, competency and the roles of practitioners involved in carers needs assessments. Current practice varies significantly, with differing expectations about who can undertake assessments, what training is required, and how competency is defined. Greater clarity from the Welsh Government and Social Care Wales would support a more confident, skilled and consistent workforce. While legislation emphasises skills, knowledge, and competence, the Code of Practice places stronger emphasis on qualifications and professional standards. Local authorities would welcome clarification on this as ambiguity creates uncertainty for local authorities and practitioners. A consistent, Wales-wide approach would strengthen practice, improve quality, and ensure carers receive equitable, high-quality assessments regardless of where they live.

Taken together, the findings of this project present a compelling case for a more unified, accessible and person-centred approach to supporting unpaid carers across Wales. By strengthening consistency, improving communication, enhancing practitioner support, updating resources and the provision of information, advice and assistance, local authorities can ensure that carers receive timely, compassionate and high-quality support regardless of where they live. The work undertaken through this project provides a strong foundation for continued improvement and collaboration in the years ahead.

It should also be noted that additional resources were identified by Welsh Government in December 2025 to deliver a small number of actions suggested in the Improvement Action Plan. These resources are being used to provide additional training resources, in the form of videos and a one page 'steps to a carer needs assessment for social care practitioners' flow chart. This document will support social care practitioners and form a useful training aid. It is included as Appendix J.

Overarching Recommendations

This report has explored seven prioritised topics taken from the Improvement Action Plan (Appendix A). Each topic has been summarised with suggestions under each heading for improvements. Whilst it is recognised that there is a lot that could be done, we are also mindful of the resources available for delivering recommendations.

In addition to the suggestions for improvements for each priority topic, a list of overarching recommendations are included in this section of the report. These recommendations are for local authorities, the Welsh Government and Social Care Wales.

Each recommendation reflects Wales- wide themes, evidenced from the seven priority research topics, and the practical improvements identified by the Project Working Group.

It is recommended that:

1. Each local authority reviews the information advice and assistance provided for unpaid carers on their website so that it has clear entry points, visible contact details, and consistent terminology. This report notes that *“IAA visibility is inconsistent or missing in some councils”* and that navigation barriers prevent carers from accessing early help. The information contained in Appendices B and C provides a useful resource to assist local authorities with this review. Councils should use intuitive layouts (e.g., tiles, menus, themed sections) and introduce visuals to improve readability.
2. Local authority websites should maximise signposting to trusted national resources that support unpaid carers, such as Carers Wales, Dewis Wales, and Carers Trust, with clear explanations of what each offers. This report highlights that *“external signposting varies significantly”* and often lacks context. Appendix D contains more detail on the information provided by these organisations.
3. Social Care Wales should take on board the findings of this review (Appendix E). The training resources available for social care practitioners carrying out carers needs assessments, should be updated broken links should be repaired and concise, step-by-step guidance for carers needs assessments should be prepared. Social Care Wales websites should host materials for training social care practitioners and align closely with third sector organisations to improve visibility and navigation of materials for practitioners.
4. Local authorities should review the recording of information for all stages of the carer journey, including first contact. This will be specific to each local authority dependent on the system they use to record information. Further work should be carried out to develop a standardised recording framework for all stages of the carer journey. This could include a Wales- wide approach to establish the principles for recording the first point of contact, What Matters conversations, formal assessments, and support planning.
5. A Wales-wide standard glossary of carer-related terminology should be coproduced with unpaid carers. It is recommended that a Focus Group is established to oversee this work and that information contained in Appendix G and the Carers Wales report to the Ministerial Advisory Group inform this shared set of terms to ensure clarity, accessibility, and relevance.
6. Welsh Government should provide further clarity on who is able to carry out carers needs assessments, to include minimum competency levels and the important role of outsourced staff. This should be aligned to the National Assessment and Eligibility Tool and will help to remove current ambiguity around what are legislative and Code of Practice requirements for skills, knowledge and competence for a person carrying out a carers needs assessment.

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7. Wales-wide sharing of good practice should be strengthened. The local authorities Carers Officers Learning and Improvement Network (COLIN) meets regularly and should continue to be supported to share examples of effective practice, updated resources, IAA and carers needs assessment processes.
8. The resources produced as additions to this project, i.e. the training videos in Welsh and English, which cover conversations with social care practitioners experienced in carrying out carers needs assessments should be published on the ADSS Cymru website and linked to the Social Care Wales website of training resources. It is anticipated that these videos will be used to build confidence in others as they carry out assessments. The one-page flow chart summary showing 'Practitioner steps to a carers needs assessment' (Appendix J) should be shared with all practitioners who carry out assessments and form part of future training for practitioners carrying out assessments.

Appendix A: Unpaid Carers Improvement Action Plan

Background

The Welsh Government asked the Association of Directors of Social Services (ADSS) Cymru to support national improvement in the provision of information, advice and assistance and carers' needs assessments by local authorities.

The work included the development and implementation of an action plan to focus on the key tasks that need to be carried out to bring about improvements. This action plan has drawn on the information gathered by the Unpaid Carers Task and Finish Group through surveys with local authority staff and engagement events with unpaid carers. It also includes data gathered from recent workshops with senior local authority leaders and conversations with colleagues from Social Care Wales, the Carers Operational Learning and Information Network and the Young Carers Professional Network.

The Ministerial Advisory Group for Unpaid Carers meeting in June 2025 received an update including the key priorities that had been identified. This group acknowledged the need to establish regional representation from local authorities to take forward a range of actions and report back in due course.

Key findings and good practice identified from consultation and engagement

The Unpaid Carers Task and Finish Group is supporting the national improvement in the provision of information, advice and assistance for carers' needs assessments by local authorities and has recently (November 2024) carried out surveys to support improvements.

The following themes were identified by **senior managers** to feel more confident that practitioners are proactive in offering a **carers' needs assessment**:

- increased/additional training for practitioners
- redesigning cared-for persons' assessment form with a mandatory field to confirm the unpaid carer has been offered a carers' needs assessment (we understand this is a mandatory field for some local authorities but not all)
- maintain accurate and up-to-date knowledge of services and benefits available to unpaid carers
- always offering a separate carers' assessment when appropriate.

The following themes were identified by **service/team managers** to feel more confident that practitioners are proactive in offering a **carers' needs assessment**:

- recording and being able to report on when an unpaid carer's support needs have been considered as well as the assessment of the person with care needs.

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- not using the term 'carers' needs assessment' when speaking to unpaid carers to give carers more assurance it is not their ability that is being assessed.
- a consistent approach to terminology and approach to assessments across all local authorities
- improved information provided by local authorities to unpaid carers to promote understanding of carers' needs assessments (including LA website information)
- improved early support and information for carers, such as written materials, training, or expert advice.
- carers officer/team at the front door could improve the quality and timeliness of carers' needs assessment.
- more face-to-face assessment interviews and fewer telephone assessments, to improve quality.
- Improved carers' needs assessment for young carers.

Examples of good practice by **local authority staff** at all levels included:

- redesigning approach to carers' assessments - they were renamed "carers' conversations" and information and guidance for staff and unpaid carers was produced
- moving the carers team to the front door, enabling an expansion of reach into the community
- working with teams in community hubs to offer a wide range of carers services
- involving unpaid carers in developing services.

Feedback from adult **unpaid carers events** included suggestions for improvements to the Information, Advice and Assistance services provided by local authorities:

- local authorities should be 'checking in' regularly with carers to see if further information or advice is required
- recognition of people's different experiences and points in their caring journey - professionals to tailor information accordingly.
- having a 'one-stop-shop' or single source of information.

Other suggestions from **unpaid carers** include ideas around improving the Carers' Needs Assessments:

- ensuring practitioners are clear about the purpose and process, and answer questions in advance.
- sending information about the assessment process in advance, prior to consideration of an assessment.
- asking questions in advance of an assessment to help carers formulate their thinking.
- checking back with what the unpaid carer has said to ensure accuracy.
- responding to carers' issues and being proactive in trying to help solve them. Not rushing, being sympathetic and non-judgmental.
- indicating wait time for an assessment to start. Suggestions for non-crisis assessments ranged from 2-8 weeks.
- not passing people between departments or separate organisations.
- transparency, being clear on what support is and isn't available and why.

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- refresh of assessments periodically.
- issue a copy (physical or digital) of the assessment to the unpaid carer promptly after its completion, within 7-10 days post-completion of the assessment.

Feedback from the **young carer event** identified that young carers would like:

- to know about what to expect and how to prepare for a carers' needs assessment.
- recognition that a carer's needs assessment is not always required to access support services.
- choice as to where assessment takes place e.g. Home or school.
- reassessment - to take account of young carers' changing circumstances.

Improvement Action Plan

The table below is an improvement action plan highlighting the key tasks identified from the consultation and engagement events, together with suggestions for who will take each action forward, within a proposed timeframe. It has not identified financial resources for delivering these activities.

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Priority Action Area 1 Local Authority Information, Advice and Assistance (IAA) – identification and engagement with carers				
Ref	Task	Who?	When?	Update
1.1	Identify a consistent approach for the recording threshold for conversations with carers through the IAA service and their first point of contact.	ADSS Cymru lead with Working Group	December 2025	Review of recording of information on conversation with carers completed (Appendix F, final report) and specific recommendations captured in the overarching report
1.2	Establish consistency in capturing the first point of contact conversation with carers and options for sign posting to further support.	ADSS Cymru lead with Working Group	December 2025	As in 1.1
1.3	Publicise information and services available to unpaid carers and how to access it through the first point of contact IAA service.	ADSS Cymru lead with Working Group	March 2026	Review of all local authorities IAA completed (Appendix B, final report) with recommendations included in the overarching report for ADSS Cymru and Welsh Government
1.4	Development of standardised terminology for unpaid carers assessments that can be rolled out across all social media platforms/local authority websites, to raise awareness of the benefits of carers' assessments.	ADSS Cymru lead with Working Group	March 2026	Review of standardised terminology (Appendix G) completed with examples of good practice captured. Recommendations included in overarching report.

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Priority Action Area 2 Carers understanding of assessments				
Ref	Task	Who?	When?	Update
2.1	Development of materials in easy read format to improve carers understanding of assessments, with an emphasis on the fact that it is not an assessment of their ability, focusing on the potential benefits and positive outcomes.	Social Care Wales/ADSS Cymru	January 2026	This work was not able to be completed within the scope of this project. However, the work on developing the flow chart will assist with this task which should be coproduced with carers.
2.2	Development of easy-to-read information for carers to support them in preparing for a carer's assessment, including recognition of the needs of young carers.	Social Care Wales ADSS Cymru	March 2026	The summary of local authority notable practice document – (Appendix B in the final report), highlights examples of good practice that should be further developed to support carers needs assessments.
2.3	Development of best practice guidance so that the carer is clear what to expect with the assessment, including: <ul style="list-style-type: none"> • Can be face to face or virtual/telephone • Receiving information in advance of the assessment to enable a carer to properly prepare for the assessment, • Giving the opportunity to check the recorded note for accuracy. • An empathetic style of assessment, actively listening to what is said and checking back on understanding • Allowing sufficient time for the assessment • Being non – judgemental • Giving the carer a copy of the assessment within a set timeframe. 	ADSS Cymru lead with Working Group/Carer representatives	March 2026	A one-page flowchart setting out: steps to a good assessment for social care practitioners has been developed. This together with the notable examples contained in Appendix b in the report will inform the development of best practice guidance.

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	<ul style="list-style-type: none"> • Strength based conversation • Clarifying the level of qualification, training or competency required by the person carrying out the assessment 			
2.4	Development of specific materials suitable and relevant for young carers	ADSS Cymru lead with Working Group/Carer representatives	March 2026	Decision taken to exclude young carers materials from the scope of this work as resources were limited. It was anticipated that findings from the general work would be able to be shared more widely in relation to young carers assessments.
Priority Action Area 3 Recording Practice: Practitioners approach to assessments				
Ref	Task	Who?	When?	Update
3.1	Establish a Working Group with regional representation from all local authorities to provide advice and guidance and assist with the implementation of identified actions	ADSS Cymru Lead	September 2025	Project working Group established with representation from each region in Wales. All local authorities have engaged with the process.
3.2	Develop All Wales Best Practice Guidance for carers assessments, with standardised terminology, based on the findings from the recent local authority surveys.	ADSS Cymru lead with Working Group	March 2026	Review of standardised terminology completed with examples of good practice captured. Recommendations

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				included in overarching report.
3.3	Establish guidance for local authority practitioners carrying out assessments on best practice for recording these sessions, including reporting performance information.	ADSS Cymru lead with Working Group	March 2026	Review of recording of information on the conversation with carers has been completed (Appendix F) and specific recommendations captured in the overarching report. Further work needed regarding capturing of performance information.
3.4	Refresh of training materials to support practitioners in carrying out unpaid carers' assessments.	Social Care Wales	February 2026	Review of training materials on Social Care Wales website completed with recommendations for improvement – Updates to the materials is on – going. Work to develop videos aimed at social care practitioners carrying out assessments is in progress.
3.5	Update the Social Care Wales resource pages with the new training materials with the option for e- learning so that local authority practitioners have access to these. This could include examples of completed carers' needs assessments.	Social Care Wales	March 2026	Work in progress based on 3.4

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3.6	Raise awareness with practitioners of the responsibility of local authorities to offer carer assessments and the learning materials available to carry out carers assessments	ADSS Cymru/Social Care Wales	March 2026	Regular updates to ADSS Cymru Leadership Group, AWASH and AWHoCS
3.7	Local authority IAA services are informed of the resources and services available for carrying out carers assessments and the importance of offering this assessment to all unpaid carers.	ADSS Cymru lead with Working Group	March 2026	Review of all local authorities IAA completed (Appendix C) with recommendations included in an overarching report for ADSS Cymru and Welsh Government. A summary of notable practice examples of IAA prepared and is Appendix B in the overarching report.
3.8	Directors of Social Services should ensure that front line practitioners are provided with relevant training and resources to carry out unpaid carers assessments.	ADSS Cymru lead with Working Group	March 2026	Regular updates to ADSS Cymru Leadership Group, AWASH and AWHoCS New training videos developed to assist practitioners carrying out assessments. One page flowchart produced containing easy read steps for a practitioner to follow in carrying out an assessment

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3.9	Universities to provide assurance that the importance of carers assessments is included on the course syllabus for social care training providers.	Social Care Wales	March 2026	Meeting to be arranged for further discussions with Universities.
Priority Action Area 4 Maintaining contact with carers/reviews				
Ref	Task	Who?	When?	Update
4.1	Development of learning resources to clearly set out information on support for carers and how to access this, including the use of direct payments.	Social Care Wales	March 2026	A review of the resources available to support social care staff in helping carers access Direct Payments has been completed and is contained in Appendix H in the final report, together with the actions needed for improvements.
4.2	Ensure that all carers' assessments are reviewed in line with personal outcomes	ADSS Cymru lead with Working Group	March 2026	Steps to a good assessment flow chart highlights the importance of personal outcomes. Training videos and other training materials focus on this need.

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Papers reviewed in the development of the action plan

Provided by Alyson Hoskins and Denise Moultrie:

- Unpaid Carers Task and Finish Group – Information Advice and Assistance and Carers’ Needs Assessments Report: Task and Finish Group - Findings and proposed next steps November 2024
- ADSSC Senior Leadership Workshop 15 May and 22 May 2025 Findings from Surveys
- PPT Presentation to AWASH Meeting 14th February 2025
- PPT Presentation to Senior Leaders 15th and 22nd May 2025
- ADSS Cymru Senior Leaders Workshop Plan

Additional papers from a desktop review:

- Welsh Government: Strategy for unpaid carers - What we will do to improve the recognition of and support of unpaid carers. Published: 23 March 2021
- Welsh Government: Strategy for unpaid carers: delivery plan 2021 The unpaid carers delivery plan supports our strategy for unpaid carers. Published: 25 November 2021
- Association of Directors of Social Services Cymru: Rapid review of how unpaid carers’ rights have been upheld during and after the Covid-19 response - June 2023
- Minutes from the Carers Ministerial Advisory Group Meeting - 19th June 2025
- Social Care Wales: Assessing Carers’ Support Needs Resource A – Training Manual - January 2019
- Social Care Wales: Assessing Carers’ Support Needs Resource B - Training Slides Pack- January 2019
- Social Care Wales: Assessing Carers’ Support Needs Resource C – Practitioner Self-Training Workbook - January 2019
- Social Care Wales: Assessing Carers’ Support Needs Resource D – Practitioner Toolkit - January 2019
- Social Care Wales and Social Care Institute for Excellence Preventative support for adult carers in Wales: rapid review 2018

Appendix B: Summary of Notable Practice Examples from Local Authorities

Topic	Local Authority	Type of Resource	Link to Resource
Information. Advice and assistance (IAA) on Council websites	Ynys Mon	Council website: Information on carers assessments Do you look after someone?	Carer's assessment Are you a carer? Do-you-look-after-someone.pdf
	Gwynedd	Council website: Looking after someone booklet How to get the best out of your assessment document?	Carers' Assessment Looking after someone? Carers-Needs-Assessment.pdf
	Flintshire	Council website: Essential Carer Guide	Help for Carers Essential Carer Guide
	Denbighshire	Link to Carers Wales Assessment Factsheet Your guide to getting an assessment in Wales	https://www.denbighshire.gov.uk/en/health-and-social-care/carers/carers-needs-assessment.aspx
	Conwy	Links to Carers Wales Videos: A Carers Guide to Assessments. What to expect. How they are done	What is a Carers Assessment? - Conwy County Borough Council
	Wrexham	What matters conversations – link to Social Care Wales website Link to Carers UK Having a Carers assessment, toolkit and video	Unpaid carers Wrexham County Borough Council Social Care Wales Carer's assessment Carers UK
	Cardiff	Request a carers needs assessment on line	Carers' needs assessment
	Vale of Glamorgan	Cardiff and Vale Unpaid Carers Charter Mental Wellbeing – Unpaid Carers Links to Carers Wales website and easy read document	https://www.valeofglamorgan.gov.uk/en/living/social_care/adult_services/Unpaid-Carers/Carers-Assessment.aspx

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Topic	Local Authority	Type of Resource	Link to Resource
			<p>Dewis Cymru https://www.carersuk.org/media/goynlvag/final-english-easy-read-guide-to-assessments-in-wales-2023-24.pdf</p>
	Pembrokeshire	<p>Carers Information Carers Wales Assessment Factsheet Carers Wales Coming Out of Hospital Factsheet Carers Wales – Looking after someone Carers Wales – Working Carers Guide Carers Wales – Being Heard – self advocacy guide</p>	<p>Help and support - Pembrokeshire County Council</p>
	Ceredigion	<p>Recently revamped website Carers Information Pack Carers Information Service Magazine A Carers guide to Planning for Emergencies - Information for small and medium businesses - Carers Wales Guides Regular Information Stands at community events. Carers Alliance (quarterly) and Forums across the County. Young carers and Adult Carers Newsletter Events for Carers Week, Young Carers Action Day and Carers Rights day. Carers Development Officers are located in the same team as Community Connectors and Ageing Well Officer which increases the reach in terms of provision of information regarding support for carers. Service Presentation – delivered to organisations and teams across Ceredigion</p>	<p>Support for Carers - Ceredigion County Council – Carers Information Service - Ceredigion County Council Carers Magazine - Winter 2025 IF YOU ARE LOOKING AFTER SOMEONE YOU MAY NEED TO READ THIS Digital Information Pack for Small and Medium Enterprises in Ceredigion Self-help Toolkit for Carers - Ceredigion County Council</p>

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Topic	Local Authority	Type of Resource	Link to Resource
	Gwent	Parent Carers Guide – Why it's never too late to plan ahead Carers Offer	Carers Guide is available as a pdf. Carers Office is available as Word document.
	Monmouthshire	Carers Online information Carers Handbook – Word doc	Welcome to Monmouthshire Carers Network - Monmouthshire
	Caerphilly	Planning for Emergencies	Caerphilly - Caerphilly County Borough
	Powys	Our commissioned provider attends daily screening meetings facilitated by ASSIST (our front door).	https://en.powys.gov.uk/article/1677/Carers-Needs-Assessment
	West Glamorgan region (Swansea and Neath Port Talbot)	Information, advice, and assistance strengthened: Swansea and Neath Port Talbot Councils have enhanced carer awareness training for staff, established Carers Development Officers, and created local Early Help Hubs to provide timely, tailored support and improve carer recognition. Neath Port Talbot has reviewed the digital online resources for carers and has created posters with QR codes for easy access to enhanced information.	
	Merthyr	Online information for Adult Carers	https://www.merthyr.gov.uk/resident/social-services-and-well-being/adult-social-care/carers/adult-carers/
Rhondda Cynon Taf	Online carers assessment information CSP promote carers' support with both Children's Service and Adult Services staff, e.g. sharing information/updates with "front door" services such as our Single Point of Access and First Response Teams This includes having in place a "Carer Call-Back request form". If a carer calls in the Council, the receiving worker at the "front door" First Response team completes a simple form that is	https://www.rctcbc.gov.uk/EN/Resident/AdultsandOlderPeople/Caringfortherpeople/Carersassessments.aspx	

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Topic	Local Authority	Type of Resource	Link to Resource
		<p>sent directly to the CSP's generic inbox which then triggers a timely response and call-back from CSP staff</p> <p>A "Welcome Call" telephone call is made to all new carer referred to the CSP and a proportionate assessment is completed</p> <p>All new carers registered with the CSP receive a "Welcome Pack" with a wealth of information which is tailored to the carer's request/situation, as identified in the "Welcome Call"</p> <p>The CSP have developed specific packs of information for specific topics, links to information/resources which they send to carers e.g. Dementia pack, Parent/Carer pack, Wellbeing and Counselling support pack</p>	
Direct Payments	Flintshire	Leaflet	Direct Payments for Carers Information Leaflet
	Cardiff	Direct Payments leaflet – Generic Guide	
	Vale of Glamorgan	Direct Payments Leaflet Direct Payments Policy Easy Read Direct Payments Policy	
	Ceredigion	Direct Payments support services - on line information	Direct Payments - Ceredigion County Council
	Gwent	Direct Payments - Guides/factsheets used across Gwent.	https://gwentrpb.wales/direct-payments

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Topic	Local Authority	Type of Resource	Link to Resource
	West Glamorgan region (Swansea and Neath Port Talbot)	Direct payments system improved: Both councils have prioritised reviewing direct payments. Swansea streamlined the application process, reducing wait times, while Neath Port Talbot is working on recommendations to improve responsiveness and creative options.	
Young Carers	Flintshire	Young Carers pre- assessment document	
	Denbighshire and Conwy	Young carers' needs assessments	
	Vales of Glamorgan	Young Carers leaflet Cardiff and Vale Young Carers Charter Young Carers in Schools Programme	
	Ceredigion	Self-help toolkit for carers - Young Carers Commissioned Service	Young Carers Area Ceredigion Carers
	Gwent	Young carers document	
	Powys	Residential respite stay for families with Neurodiverse children following an identified need.	
	Rhondda Cynon Taf	For the Young Adult Carer Service there are very effective links and transition processes in place with the Young Carer Service, which includes transition events held at least bi-monthly Young Adult Carer Service has excellent links with wellbeing support providers within local colleges to promote the service and to raise awareness	

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Topic	Local Authority	Type of Resource	Link to Resource
Carers Needs Assessment	Cardiff	Useful Services Directory Factsheet detailing what is a carer and support available Offer letter accepted – Carers Wales factsheet sent Unpaid Carers newsletter	Information only sent out when referral for assessment accepted. Link to Carers Wales Factsheet
	Vale of Glamorgan	Pre-carers needs assessment letter Post-carers needs assessment letter Practitioners good practice guide for completing Carers Needs Assessments Threshold Matrix Vale Unpaid Carer Bulletin Carer Friendly Initiative aims to improve and recognise support for unpaid carers in Cardiff and the Vale of Glamorgan, providing training, resources, and workshops	
	Powys	Carers Questionnaire self-assessment form Creative respite project – A bespoke and tailored approach to meet the persons outcomes and strengths. Powys have reset their carers Engage to Change forum following engagement with Carers of how they would like this to look with the following outcomes: <ul style="list-style-type: none"> • Carers have opportunities to feel heard and to identify priorities that matter to them. • Carers are empowered to have an equal voice to influence change through robust governance channels • All partners and agencies work together to support the health and wellbeing of the Carer and their family 	
	Pembrokeshire	Carers Wales Assessment Factsheet Carers Wales - Coming Out of Hospital factsheet Carers Wales - Looking after someone	Help and support - Pembrokeshire County Council

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Topic	Local Authority	Type of Resource	Link to Resource
		Carers Wales - Working Carers Guide Carers Wales - Being Heard – self advocacy guide	
	Ceredigion	Council webpages Carer Factsheet – preparing for Young Carer’s Needs Assessment Carers Wales Guides A Carer’s Guide: Preparing for your Carer’s Needs Assessment.	Carers Assessments - Ceredigion County Council Carer Factsheet: Preparing for your Carer's Needs Assessment
	Gwent	Guidelines for Undertaking a Carers Needs Assessment document	
	West Glamorgan region (Swansea and Neath Port Talbot)	Respite services enhanced: Swansea and Neath Port Talbot Councils have introduced more flexible respite options, allowing carers to book tailored breaks without lengthy approvals, including various residential and day opportunities. Nursing respite remains under review.	
Maintaining Contact with Carers	Ceredigion	Maintaining Contact with Carers and Review <ul style="list-style-type: none"> • Employers for Carers Membership • Carers Policy and Passport. • Carers Register and carer’s card. 	
	West Glamorgan Region (Swansea and Neath Port Talbot)	Workplace support for carers expanded: Swansea Council updated its Flexible Working Policy and raised awareness internally, while Neath Port Talbot joined the Employers for Carers Scheme to provide staff with advice and peer support. Both councils emphasise supporting employees balancing work and care. Employee/carer communication: Both Neath Port Talbot and Swansea Council have developed an initiative of staff engagement to raise the communication of information from third	

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Topic	Local Authority	Type of Resource	Link to Resource
		sector organisations to workforce delivery by using Carer Champions.	
	Merthyr	<p>Merthyr Tydfil Unpaid Carers Partnership: Until 2021, a service that meets the needs of carers regardless of any protected characteristics or the varying needs, conditions or disabilities of the person they were caring for.</p> <p>Town Centre Hub: Providing drop-in face to face support for unpaid carers 5 days a week- operating with direct links to benefits, housing and other organisations to support carers with additional needs.</p> <p>Neuro Hub/Café- Support for carers supporting an individual with a neurological condition.</p> <p>Facebook Group- Private Facebook group for unpaid carers in the area to be kept up to date on events, advice and information and activities for them.</p> <p>Carer Support Coordinator identified as a carers workplace champion within the LA, providing support, advice and information to those carers working with the LA.</p> <p>Self-referral to the CSC for unpaid carers, can directly access contact details for further advice/appointments.</p> <p>CSC regularly attend carers coffee mornings, groups, activities etc, and seek out groups that may have unidentified carers.</p> <p>CSC have regular 'drop-in' sessions at high footfall places such as community centres, the local hospital, leisure centres etc, to seek new carers.</p> <p>CSC work with the local College for carers who are 18+ to access support.</p> <p>CSC also offer carers home visits with and/or without social workers, other third sector organisations such as the Alzheimer's</p>	

Local Authority IAA and Needs Assessments for Unpaid Carers

Topic	Local Authority	Type of Resource	Link to Resource
		society etc, to highlight carers can still access support if they are unable to leave their home. Regular links with internal day centres and care homes to support the carers there.	
Recording of assessments	Ceredigion	Recording Practice (assessments) <ul style="list-style-type: none"> Quality Assurance guidance for Young Carers Assessments. Assessments delivered by commissioned service and sample QAd by Ceredigion County Council. Council Quality Assurance Framework for assessments. 	

Information provided by Members of the Project Working Group.

Appendix C: Topic 1 LA IAA

Blaenau Gwent County Borough Council

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
Is the information clear and easy to understand?	It has a mission statement and key principles which is quite different – but it's probably not more important than the information that comes after it – “how do I as a carer access help from social services?”	Homepage>Resident>Health, Wellbeing and Social Care>Social Services>LOST! It turns out you go to 'Getting the help you need' then to 'Help for Adults' then to 'Carers'. – search works but it's not easy to find if you were clicking through pages. Long single page with no navigation or contents.	Not a great example. Very limited resources and not IAA focused to focused on assessment and our principles which carers may not be looking for.	Remove principles, remove grant people can't apply for – maybe hide them behind links so they can be deactivated when not available. Add in navigation if keeping one big page and titles and explain the purpose of external links.
Is the carer signposted to useful resources?	Includes addiction in definition of why someone might need care, text feels very similar to others – was there a historic template everyone used or is this taken from the act? Unpaid carers factsheet looks nice but misses any IAA reference.	Page starts with 'Carers Support Fund Wales' and then immediately says its closed – hide it put it at the bottom – link to it – it's not great to welcome people to the page with here is something you can't have. - Carers assessment talks of 'able' again and the focus is on assessment not IAA first.		
What resources is the carer signposted to?		Some external links but no explanation on them. - Second from last part of the page is the IAA signposting it does say IAA but then points		

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		to a Duty Team. - Third sector support – 1 organisation listed makes it seem like that is all the support – nothing for dementia or condition-based charity support or more general carers charities.		
https://www.blaenau-gwent.gov.uk/resident/health-wellbeing-social-care/getting-the-help-you-need/help-for-adults/carers/				

Bridgend County Borough Council

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
Is the information clear and easy to understand?	Clear and easy to understand. Clear and comprehensive information about Carers Needs Assessments and preparing for one.	Language switches between 'carer' and 'unpaid carer'.	Clear definition of an unpaid carer and rights. Easy to understand. Links to TuVida for additional support and third sector links. Some improvements could be made.	Isolate Bridgend CC contact for assessment. Check language for consistency. Add link for young carers. Title of page is 'Carers', rather than 'Unpaid Carers' or 'Caring for someone' - could be clearer about who the page is intended for.
Is the carer signposted to useful resources?	Clear links and contacts to Bridgend Carers Wellbeing Service. Link to Unpaid Carer Booklet for signposting.	Contact details for the Council's Common Access Point is listed in the TuVida section – it isn't clear that it is the council contact or how to access assessment.		
What resources is the carer signposted to?	Visual links to TuVida - Bridgend Carers Wellbeing Service, Carers Wales, Citizens Advice Bureau, Carers Trust, Turn2Us.	Insert a link to the Young Carers information.		
https://www.bridgend.gov.uk/residents/social-care-and-wellbeing/carers/				

Caerphilly County Borough Council

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
<p>Is the information clear and easy to understand?</p>		<p>Homepage > Resident > Adults and older People (not Social Services which does have a page which then links back to the caring for someone under Adults and older people) > Caring for someone Young Carers also sites under Adults and Older People then Caring for Someone. May not always get found.</p>	<p>This is missing some aspects – it’s hard to find initially but the way different pages of the website generally link to each other you can loop back if you keep clicking links and eventually get to the information you expect. Pages need a review as some out-of-date information and the events are all in the past.</p>	<p>Overall, the content is ok but signposting to IAA is not good, the 10 first steps for carers has tips but no explicit contact details other than the generic contact us which is not clear if this is the IAA service. Only when on the assessment page does it start talking about the IAA services. When searching for a page it shows publication date but could not see that on the page, clearly it’s a function so maybe be better on the page rather than the search?</p>
<p>Is the carer signposted to useful resources?</p>	<p>Getting help and support page – 10 tips quite a nice way to do it – probably make more of the leaflet. Good quality when caring ends page. Strong section on ‘dealing with emergencies’ with an attached guide and plan for an unpaid carer to complete. Has a page for Carers Support groups which was different from others. Assessment page expressly says contact the IAA team and has an internal document to prepare for carers assessments – also mentions support to carers with learning disabilities.</p>	<p>Carers newsletter – seems inconsistent in publication, with last newsletter issued in 2025. Remove this section if this is no longer completed? Looking after yourself, attached guides goes into different areas of healthy living, but main page just covers nutrition. There is no dedicated IAA page or contact details.</p>		

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What resources is the carer signposted to?	Quite a variety including lots of internally delivered services.	There are quite a few different places to call email addresses and phone numbers. It could be quite confusing which team to call.		
https://www.caerphilly.gov.uk/carers				

Cardiff City Council

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
Is the information clear and easy to understand?	Nicely broken down into easy-to-read sections. As much as possible broken down into bullet points to make it as easy to read as possible.	Very text heavy with no images. Something to break up the text would be helpful.	Carers Section is not easy to get back to without using back button as arrows at top when in a section does not take you back to the carers section. However very easy to search in search bar for content. Especially like the 'Looking after a relative or friend' title as not everyone realises that they are a carer and opens up a conversation. And the fact that contact details are left for a coordinator so that people can have a conversation and not just sent through to a point of entry/switchboard to be passed on. Feels a little bit like carers are not the priority when getting the info on their website together. Not	Carers rights and Dewis could have a page to explain what they are before sending you straight to a website. Images to break up text, especially in the young carer section would be nice. Maybe some type of easy to navigate back to carers section. Not sure if there is a carers info service that people can join or carer card as not easy to find out even when searching.
Is the carer signposted to useful resources?	Young carers have a young carers coordinator that they have contact info for on the website in case anyone would like a chat. • Family gateway. • Cardiff YMCA Young Carers Project. • Dewis link. • Carers Rights	• Dewis section just links straight to the website. No info on what it is on council web page. • This is the same as above for Carers Rights section.		
What resources is the carer signposted to?				

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			much explanation to things or why you are being sent to other websites.	
https://www.cardiff.gov.uk/ENG/resident/Social-Services-and-Wellbeing/Carers/Pages/default.aspx				

Carmarthenshire County Council

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
Is the information clear and easy to understand?	Easy to navigate with information behind different icons/tiles - I like this visual impact. Explanation of what an unpaid carer is exists.	Could improve unpaid carer definition to include conditions, i.e. disability, additional needs etc. Could also note that unpaid carers do not get a wage for their role, but Carers Allowance doesn't count as a wage.	Page updated on: 30/10/25' at top of the page, which I like. Good practice for carers to know if the information is current or possibly not. Clear and easy to navigate to what information you require. Navigation tiles as a visual are helpful. Comprehensive IAA.	May consider the page title being 'Support for unpaid carers' instead of 'Support for carers'. Phone number for IAA and assessment is a must, and possibly postal address.
Is the carer signposted to useful resources?	Extensive information under different icons. Clear access to assessment via weblink, phone or in writing. Clear link for young carers.	Difficult to find a phone number to request an assessment or IAA. I didn't find one.		
What resources is the carer signposted to?	Adferiad. Connect Carmarthenshire. Carers Trust Crossroads West Wales. Carers Support West Wales. Breakthro. Planed. Carers Wales. Government sites. Short Break options.			
https://www.carmarthenshire.gov.wales/council-services/social-services/support-for-carers/				

Ceredigion County Council

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
Is the information clear and easy to understand?	Easy to find – Homepage> Wellbeing and Care> Support for Carers. Some pages are really simple and to the point and easy to understand like the 'Carers Assessment page' and 'Hospital Support Page' Young Carers pages are with Adult but as they are under the quite generic and broad "Wellbeing and Care" this makes sense.	The 'Gofalwyrcredigioncarers.cymru' (Credu) site comes up before the council pages on search engines. There is a page under Wellbeing and Care called 'Search for Information Advice and Support' – this has links to a variety of resources but nothing carer related and no descriptions of what's behind those links if you didn't already know. Some pages need updated and reviewed – i.e. Carers Rights.	There is lots of information available on a large variety of topics and some potential examples of best practice like the self-help toolkit and Carers Card pages.	Outdated – no 'contents' or navigation within many pages and those that have it content is hidden by 'boxes' as you move between them. Some content needs reviewed but much is up to date. There is a large amount of content however it is quite well divided and organised some improvement possible. There are limited links to third sector sites. No explicit IAA page or phone number for an IAA service listed but there is the Carers Information Service but that seems to be an email/digital updates membership list.
Is the carer signposted to useful resources?	Variety of links – bit of an outdated design style. Clear who to contact for assessment and has dedicated page but nothing for IAA. New to Caring page is a nice idea – very short practical - not too much to have to read – almost a check list – links to a carers information pack which is mostly up to date. Carers Rights – Employment and Personal Learning page is good content wise - layout	Includes references to payment rates on Money and Benefits would be better to not include so don't have to annually review. Assessment guide is Carers Wales form 2016 – needs updating or linked to current. Locally produced guides for assessments for adults and young carers. Planning Support for Carers & Law Affecting Carers page I question the purpose of. Not obvious that the "Carers in		

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Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
	could be better – info hidden when first arrive. Health and Wellbeing – Self Help Toolkit is a different idea compared to other sites reviewed – might be a good idea to implement nationally. Carers Card pages are good, easy to understand navigate and links all work to apply – local discounts.	employment” page is meant to support employers to support carers in their workforce and not directly support for carers alongside work. Young Carers page, content ok but gets hidden by the ‘drop-down boxes’ as you navigate - could be improved.		
What resources is the carer signposted to?	Good signposting to internal and carer focused services.	Does miss some links to external services. Use of some 3rd sector documents are out of date.		
https://www.ceredigion.gov.uk/resident/wellbeing-and-care/support-for-carers/				

Conwy Borough Council

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
Is the information clear and easy to understand?	Hard to find any helpful information. It's not hard to understand but doesn't feel as though anything is really there. Parent carers section is best bit on website. Everything else is like a few lines explaining as little as possible and then has contact info or links to other websites to explain/give help and support.	Putting information in there that would be helpful and easy to understand for carers so that they have one hub of information instead of lots of links to continue searching for help.	I feel like this is a very poor website and as a carer, I would not find this helpful or feel like that the council wants to support me in my caring role. Hard to navigate to find anything helpful. Thought I was looking in wrong place for a while, potentially not the councils website but it was.	A rework of all pages with focus on giving carers the help that they are looking for.
Is the carer signposted to useful resources?	Yes loads, however does feel like the other resources are being used to do the heavy lifting for the lack of work that they have put into their website.	Streamline links as it is a little overwhelming seeing a list of places when multiple links to the same org.		
What resources is the carer signposted to?	Cares Wales – various pages. Various different charities. Citizens advice.	Same as above.		
https://www.conwy.gov.uk/en/Resident/Social-Care-and-Wellbeing/Carers/Information-Advice-and-Assistance-for-Carers.aspx				

Denbighshire County Council

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
Is the information clear and easy to understand?	Young carers are given the option of a callback. Lots of external web links.	Lots of black text against a white screen, makes it hard to read / follow. An image or two and better formatting (sections page) would help.	Basic info covered and has links to Credu/Dewis but without much info on why carers need it or how to access it. Doesn't come across that carers are a priority. Feels uninviting with very formal language and no real explanation of what the benefits are to carers who follow-through with accessing support.	Info on how to register as a carer in the county with links. Add in a navigation dropdown on the page so I can see all the other pages & information available to carers (and relevant support) in one place. Use of imagery.
Is the carer signposted to useful resources?	Credu website, Telecare links.	More relevant external resources / links. (NEWCIS etc.)		
What resources is the carer signposted to?	Carer is mostly signposted to Dewis & Credu website - Young Carers Support for Young Carers.	Any digital info or resources that are specific to the area. Any social media or local support groups and initiatives.		
https://www.denbighshire.gov.uk/en/health-and-social-care/carers/carers.aspx				

Flintshire County Council

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
Is the information clear and easy to understand?	Not sure if there is a CIS for this council either. Nice Carers Guide. Does seem all info is in one place/links off to all pages that could help.	Could not find anything for young carers at all.	NEWCIS – best bit about website is linking to this. Content is created with carers in mind! They have photos, lovely colourful text breaking sections down in young carers section, useful links that you can click in text to take you to other areas of their website to further explain sections, nice photos, colourful headings to break up black text – YCN have not been made since 2022 so not sure how up to date info is, nice tiles with photos to break down sections.	More info needed instead of just linking to pages. If going to have website like this – highlight NEWCIS as it is a great b hub of info that they pay into.
Is the carer signposted to useful resources?	North East Wales info service - Extremely good carers info service.	Highlight NEWCIS more.		
What resources is the carer signposted to?	Telecare. Reablement. Dementia. Direct payments. Social services info leaflet. Carer homes. Equipment and adaptation Dewis. North East Wales info service Carers UK. Carers Week. Hafal. Alzheimer's Society for county. Nero therapy centre. Crossroads café.	Cares Wales is not even in this list.		
https://www.flintshire.gov.uk/en/Resident/Social-Services/Help-for-Carers.aspx				

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Cyngor Gwynedd

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
Is the information clear and easy to understand?	Aside from the description of who is a carer There is a clear drop-down list of further information.	Entry point to Carers info is listed under Health and Social Care. Not intuitive title for the public. Once on the page, jargon definition of a carer.	Some strong elements once the relevant page has been found. In order to navigate to the Carers page, people need to already understand that they are a Carer.	Main website menu could be written in more user- friendly terms, avoiding professional jargon.
Is the carer signposted to useful resources?	Good, easy to find link to Carers Outreach service; very clear descriptions of who is a carer and what services are provided.			
What resources is the carer signposted to?	Support, finance, travel; Contact with Carers Link Officers. Description is encouraging/ welcoming.			

<https://www.gwynedd.llyw.cymru/en/Residents/Health-and-social-care/Carers/Carers.aspx>

Isle of Anglesey County Council

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
Is the information clear and easy to understand?	Easy to find on main entry page. Easy Links to Carers Outreach service North Wales, Carers Trust North Wales.	Need to return to Carers page each time to follow new sub menu link. The language throughout is professional jargon; could be more user friendly.	Easy to access information if you already know you are an Unpaid Carer.	More user-friendly language throughout.

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Is the carer signposted to useful resources?	Yes, see above.			
What resources is the carer signposted to?	Support and info.			
https://www.anglesey.gov.wales/en/Residents/social-care-and-wellbeing/Carers/Section.aspx				

Merthyr Tydfil County Borough Council

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
Is the information clear and easy to understand?	Clear contact details on 'Adult Carers' page, including all options. Accessible video is available on 'Carer support groups and organisations' page.	Landing page 'Caring for others' is pretty blank. 'Adult Carers' page is very wordy. Top paragraph is repeated. 'Support and Advice for Young Carers' page doesn't give an age range of support. No email contact or weblink for young carers.	Clear contact details with all options - postal, email, phone. Great that Merthyr Tydfil have a Carers Strategy, which is visible, BUT it is an outdated version. I like the video as an explanation of service.	Include link to young carers from adult page. Update 'Further information' - Carers Measure (change to WG Carers Strategy) and MT Carers Strategy. Consider breaking text down into different pages with links, or breaking up with images. Consider easy read format.
Is the carer signposted to useful resources?	Clear links on 'Adult carers' page.	No link to young carers from adult page.		
What resources is the carer signposted to?	Advocacy. Age Connect. Alzheimer's Society. Benefits advice. Carers	Outdated information links Carers Strategies (Wales) Measure 2010 is linked.		

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	Wales. Carers Direct. Mind. Carers Trust.	Merthyr Tydfil Carers Strategy 2012-2017 is linked.		
https://www.merthyr.gov.uk/resident/social-services-and-well-being/adult-social-care/carers/				

Monmouthshire County Council

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
<p>Is the information clear and easy to understand?</p>	<p>Home Page > Care > Carers Network (1 of just 6 options). All on a single page. 'Important things to note' under definition of carer is a different idea.</p>	<p>All on a single webpage without navigation tools to headings. Using the heading 'Carers Network' does not suggest it is about unpaid carers (or support for them) , could be paid or voluntary service carers of many kinds, also foster, kinship etc. Heading on 'Adults Service' page is better – (Looking after someone...). No link at all in Children's Social care. Definition of carers does not include those caring for someone with problematic substance use "as to whether you are able and willing to provide care to the person you care for" – the use of the 'able' – its not an assessment of ability its an assessment of need might not be the best phrasing.</p>	<p>There is only a single page (there are a few more I found via search functions but I think they have been deliberately hidden from navigation but you can still find them via a search engine – we have this issue in Cardiff too). There is a strong focus on assessment rather than IAA as a service or standalone offer. Links need reviewing to ensure visitor is directed to pages relevant for unpaid carers through both adult and children pages.</p>	<p>It's a long page single page, quick fix would be navigable headings and contents at top. Needs updating after best practice established . Better signposting to relevant unpaid carers support needed in menus for social care in Monmouth, and Social Care for Children.</p>

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Is the carer signposted to useful resources?	Carers Allowance	The linked handbooks are interesting but are in need of a review/update – emergencies form is a good practice.		
What resources is the carer signposted to?	Locality Adult Services social work teams and Young Carers Service contact details. 'Useful information' section includes handbooks, link to Gov.uk for Carers Allowance, and mentions Monmouthshire Carers Network Facebook but no link Registration form for Monmouthshire Carers Network.	No obvious signposting to an IAA service – just locality social work teams not clear where the IAA function is.		
https://www.monmouthshire.gov.uk/social-care/carers-project/				

Neath Port Talbot Council

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
Is the information clear and easy to understand?	Homepage > All Service> Adult Social Care > Support for Carers (not the most obvious but not the worst).	Range of information is limited to Carers Assessments – Financial Support – Young Carers and Respite/Shortbreaks. No obvious IAA service promoted from carers pages. Adult and children spoc	This is quite a limited example and has a strong focus towards assessment rather than IAA.	Dedicated space for IAA more links to external 3 rd sector support and explanation of what the links are who they are for. Include information and/or links to Dewis Wales.

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		doesn't mention unpaid carers.		
Is the carer signposted to useful resources?	The carers assessment page is ok, the post assessment bits are good, honest about potential for charges for services, a little too focused on assessment and not the steps that might come before under the preventative IAA agenda.	The financial support, while limited, is a better way to present it by linking to pages that will be updated than other sites which list payment rates and need annually checking and updating.		
What resources is the carer signposted to?		Very limited – only external links are for benefits – no links to carers wales or local charities – only a small reference in the assessment section about the assessments for Parent Carers being undertaken by Neath Port Talbot Carers Service.		
https://www.npt.gov.uk/adult-social-care/support-for-carers/				

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Newport City Council

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
Is the information clear and easy to understand?	Once I got onto the right page, the explanation of who is a carer is very good; written in everyday language.	Main entry page has no direct link; not intuitive to find Carers info; I used the search button.	Once the Carers page is successfully located, the information is accessible and easy to understand.	Navigation of website requires people to know that they are Carers.
Is the carer signposted to useful resources?	Good menu on the side; links to Community Connectors and lists groups, support etc very clearly.	Link to Care Collective website not working.		
What resources is the carer signposted to?	Carers Outreach Service plus comprehensive range within and external groups.			
https://www.newport.gov.uk/en/Care-Support/Carers/Carers.aspx				

Pembrokeshire County Council

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
Is the information clear and easy to understand?	Yes – Information is clearly set out with sub-sections/quick links on different topics.	Initial landing page set out well, but the sub-topic pages are wordy.	Pathway is easy to find. Initial landing page is set out well and easy to read. Some useful resources but focussed on employment and finances.	Consider expanding the types of support and resources signposted to.
Is the carer signposted to useful resources?	Yes, under relevant links, i.e. financial support. Takes you to direct site e.g. DWP. Good information regarding types of carers.	Signposting and information given if highly focussed on employment rights or getting back into work. Could have more resources surrounding		

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		health and wellbeing, what groups are in the area etc.		
What resources is the carer signposted to?	DWP, Carers UK, Health Board resources.	Signposting and information given if highly focussed on employment rights or getting back into work. Could have more resources surrounding wellbeing.		
https://www.pembrokeshire.gov.uk/social-services-and-wellbeing/unpaid-carers				

Powys County Council

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
Is the information clear and easy to understand?	Quick links available at the top of the page (Financial support, Breaks, Assessment & Young Carers). Helpful easy to understand information about Carers Needs Assessments + clear link & contact details to request one.	Wordy, not very visual.	Took a bit of time to find the right starting point - I landed on 'Support for carers' rather than 'Help for carers' - could be confusing. Clear contact details are good.	Consider breaking text up with images, making it easier to read. Pathways seems a bit confusing.
Is the carer signposted to useful resources?	Yes, under relevant links, i.e. financial support.	Limited information re: specific conditions or carer groups, although DEWIS and Credu are signposted.		
What resources is the carer signposted to?	Clear link with Credu (Carers support org). Welsh Gov. Citizen's Advice.	Limited signposting, although some could be found through Credu.		
https://en.powys.gov.uk/article/14402/Support-for-Carers				

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Rhondda Cynon Taf County Borough Council

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
Is the information clear and easy to understand?	Clear landing page with clear options for searching. Clear Carers Needs Assessment info & how to request one		Easy to navigate under different icons/tiles. Comprehensive information broken into different sections. A few tweaks would make these webpages really good.	Add young carers support link from 'Caring for other people' page as well as 'support for carers' page. Consider adding contact details to more pages - email and phone number.
Is the carer signposted to useful resources?	Quarterly newsletters. Emergency Planning Toolkit. Clear link for young adult carers, harder to find for young carers.	Takes a bit of navigating to find contact details for RCT.		
What resources is the carer signposted to?		Couldn't find any signposting to external sources apart from via newsletters.		
https://www.rctcbc.gov.uk/EN/Resident/AdultsandOlderPeople/Caringforotherpeople/Supportforcarers/Supportforcarers.aspx				

Swansea Council

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
Is the information clear and easy to understand?	Homepage > Residents > Social Care and Wellbeing > Unpaid carers – only three clicks to navigate to page. The welcome statement 'what is an unpaid carer' is one of the better ones – very focused on the carer not the person with care and support	There is no obvious signposting to an IAA service – it mentions the Swansea Carer Centre as first place to go, if unsure, but never states that this is their IAA service. It's then listed after 'further support' and 'short breaks'. · Some confusion with	The way pages flow with simple information leading to more detail on further pages is good – some pages do need improvement the link to Swansea Carer Centre is particularly bad. Has some examples of interesting and good practice.	More explicit with the IAA service and where to go, more focus on IAA as a support not just assessment. Update out of date pages especially those relating to finances. (Outside the remit of this review but advocate for a move away from the

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	needs. Particularly like the final sentence in the statement which starts, 'These pages are intended as signposts...not a substitute for the specialist advice that individual unpaid carers may need'.	the Common Access point as that talks about "the right support at the right time" which could also be their IAA service.		pure white background on website or get the accessibility tools fixed as could not change background colour. This is the only LA website I reviewed with a pure white background and it was really noticeable). Include reference to Dewis Wales for further information on support and signposts to local and national information and support.
Is the carer signposted to useful resources?	Young Adults and Young Carers pages are good with links to both statutory support and 3rd sector – still a focus on Assessment and not IAA – small reference to you can also get support from Swansea Carers Centre	Finance and benefits for carers is out of date has wrong payment rates – would be better to signpost to other websites or services who regularly update or gov.uk to avoid errors. Carers Needs Assessments focuses on Adults caring for adults and only if you click through are you signposted for young carers or parent carers assessment, and this is at the foot of the text.		
What resources is the carer signposted to?	Further sources of advice and support for carers page and has a good variety of external support services, council services, tools like AskSARA, its laid out nicely with explanations of who/what each of the links is for.			
https://www.swansea.gov.uk/unpaidcarerssupport				

Torfaen County Borough Council

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
<p>Is the information clear and easy to understand?</p>	<p>Home > Social Care > 'Caring for Someone' (first link) - easy to find the pages – work on internal search. The 'Green links' to quick services that run across all pages are nice – could add more like a carer needs assessment request/relevant open grants etc. Each webpage displays the date the page was last modified. Carers feedback back page with digital and phone options.</p>	<p>Search engine wants to take you to 'Services for Carers' rather than 'Caring for Someone'. Adult Carers Assessments page – doesn't expressly tell you how to request one – last modified 2018 – Doesn't mention Torfaen Carers Hub which is mentioned on 'Service for Carers'. Young Carers page has no mention of assessment or how to request. There is no page dedicated to 'Information and Advice or similar – there is 'Services for Carers' – it never expressly says which services is the IAA service for carers – 'Torfaen Carers Support'. Limited information and should probably make more of the support worker as otherwise it looks like you can only get an emergency card or a library card which might put residents off asking for more help if they think that is all they will get. 'Caring for someone page' in not limited to just carers as title suggests</p>	<p>Good variety of pages, however many are from 4 years or more ago and some are very limited in scope, might be better to have less pages with a bit more information on each. Links to external sites limited, same external likes – Carers UK, Carers Wales, Carers Trust on most pages. Where a page has been recently updated it is more informative with much more content and better external links – 'Direct Payments' page is much better than most of the other pages updated in 2025. (except for the broken 'private video' embedded in the page). Carers Allowance Page is 3 years out of date – this is in my view something that would be more prudent to point to another agency – especially a Welsh Government funded one like Advice Link Cymru. Cardiff's approach is to not list any of the payment rates that change and explain it more</p>	<p>More contact details and more consistency of contact details – do only new carers call the Torfaen Carers Hub – is that the IAA service or is Call Torfaen the IAA service. It's not clear. There are examples of good pages with lots of content and a nice flow but many of the pages are limited. Links to DEWIS for local community sign posting and National support/services.</p>

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Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
		but also has carer leavers and shared lives information and living with dementia information. Blurs the lines between carers and people with support needs and conflicts with 'What is a Carer?' page.	generally so we don't have to ensure we update it yearly.	
Is the carer signposted to useful resources?	'Social Care' page signposting has good quick links – Blue Badge etc.	'What is a Carer' could do with a refresh – refers to Carers Hub but no phone number – phone number needs to be more prominent. 'Services for carers' is quite limited – maybe better it being 'Council services for carers'. Living well with dementia after diagnosis – links to a very long PDF.		
What resources is the carer signposted to?	Young Carer ID card application (for both young person and guardians). Links on Social Care Page also good – Bus Passes, Blue Badges etc. When Caring Ends Page – very straight to the point but that's recommended around death/grief and addresses both cared for and carer passing.	Your rights as a carer – no external links and it's a very basic overview – could include rights beyond those in the SSWBA (Wales) 2014 – for example Carers Leave or Flexible working legislation.		

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Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
https://www.torfaen.gov.uk/en/HealthSocialCare/Caring-for-Someone/Carerssupportservice/Carers-support-services.aspx				

Vale of Glamorgan Council

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
Is the information clear and easy to understand?	Yes, easy to follow, navigation on left-side helps. Lots of ways to contact LA.	Images would help to break up the text.	Overall easy to read and follow. Lots of links, contact info, subtle call-to-action and funnelling through use of buttons. Language is friendly and supportive. Feels like they care about carers being supported.	Use of imagery would be a good way to separate each section of info. Move the 'Other useful information..' page to the bottom of the 'Information for unpaid carers'. Avoids duplicating links / info.
Is the carer signposted to useful resources?	Yes, lots of great links to specific and wider support services, both LA and external.	External links to support services and initiatives in Vale.		
What resources is the carer signposted to?	Good video about benefits of Carers Needs Assessments. Signposted to LA support, Dewis, Learning Links, After-school support etc.	'Other useful information..' page is full of good info but easy to overlook. Short breaks could be moved to 'Looking after yourself' page.		
https://www.valeofglamorgan.gov.uk/en/living/social_care/adult_services/Unpaid-Carers/Unpaid-Carers.aspx				

Wrexham County Borough Council

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
Is the information clear and easy to understand?	Yes	Lots of information listed on one page – very wordy, not very visual.	Lots of links for extra information. Exclusive information for parent carers is helpful. Extensive information.	Consider more visuals to break up text and listed nature of information.
Is the carer signposted to useful resources?	Information on Carers Needs Assessment and how to request one. Clear link to NEWCIS (Carers support org). Comprehensive list of information.			
What resources is the carer signposted to?	Clear links with lots of external and internal services. Nice link for parent carers which is not often seen on other webpages.			

<https://www.wrexham.gov.uk/service/unpaid-carers>

Any Council in England

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
Is the information clear and easy to understand?	Yes, Information is broken into sections such as wellbeing, assessments, financial support, and local services, making it accessible for most users.	Support for young carers is included but could be more clearly highlighted.	The range of support covered reflects a strong and inclusive approach.	Improve separation of adult and young carers' information would further enhance the effectiveness of the service.
Is the carer signposted to useful resources?	The Council directs carers to organisations that can provide tailored advice and ongoing support also including council-run services.	Stronger visibility of these trusted external resources		
What resources is the carer signposted to?	Essex Wellbeing Service, Carer's Assessments, Local commissioned organisations, Online support services and Financial support information Emergency planning.	Resources are not always clearly prioritised		
https://www.essex.gov.uk/adult-social-care-and-health/caring-someone				

Any Council in Northern Ireland

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
Is the information clear and easy to understand?	Yes, Dedicated contact points (phone/email) for carers to get information directly.	Carers may have to move between trust pages and external sites to get full information.	Overall clear base information exists, but the user journey could be streamlined by creating one central page.	Navigation could be improved via a single “Carers support links” panel on all trust pages that includes contact numbers.
Is the carer signposted to useful resources?	It is as young carers signposting is integrated in several trust sites and through education authority support pages.	Sites do not prominently feature practical how to access benefits or assessment processes.		
What resources is the carer signposted to?	The inclusion of direct contact details helps carers access advice and assistance promptly.	Carer information is spread across multiple HSC Trust websites, which can make navigation confusing and inconsistent.		
https://belfasttrust.hscni.net/service/carers-services/				

Any Council in Scotland

Research points	What works well?	What could be better?	Conclusion	Suggestions for improvement
Is the information clear and easy to understand?	Yes, straightforward and to the point. Lots of bullet points.	More information and why it's relevant to carers, next steps, how to register as a carer with LA. No mention of Carers Needs Assessments.	Feels like all the statutory info is given but without much context as to why. Feels impersonal and like there is no further support available apart from the Bridgit app.	Page navigation not easy. Page navigation not easy. Some pages have nav at the bottom, others don't. Add nav to all pages. More info on what the LA is doing to support carers and how to register. Images.
Is the carer signposted to useful resources?	Only resource is the Bridgit app seems good at first glance.	More resources – specific support i.e. short breaks.		
What resources is the carer signposted to?	Bridgit app and external orgs - Bridgit Care.	More resources and links. Better explanation of how these resources will impact carers positively.		

Appendix D: Review of the Resources available on Third Sector Carer organisation websites to assist practitioners carrying out Carers Needs Assessments

Carers UK (Wales) <i>General Overview: Information is aimed at Carers, not at professionals.</i> <i>Some information needs to be checked as it may be misleading. It could raise expectations of what a carers needs assessment is e.g. service provision and check list offer, rather than a needs led discussion resulting in outcome focussed solutions.</i>		
<p>Websites and Resources Researched</p> <p>Carer's needs assessment Carers Wales assessments-wales-april-2025-26.pdf</p> <p>Assessments in Wales - An Easy Read guide</p>	<ul style="list-style-type: none"> • How easy are these resources to navigate? <p><u>Carers Assessment Video</u> Easy to access. Graphics are helpful and engaging. Outlines generic Information for carers assessments across UK Helpful for a carer to understand</p> <p><u>Written information is clear</u> Includes Young Carers & Parents Information</p> <ul style="list-style-type: none"> • <i>Do they provide the information needed to help an officer carry out a Carers Need Assessment?</i> <p>Information is directed at Carers as opposed to officers. Easy Read Factsheets are colourful, and easy to understand. Factsheet is very comprehensive</p> <ul style="list-style-type: none"> • <i>What else would you like to see included in good practice guidance for officers carrying out Assessments?</i> 	<ul style="list-style-type: none"> • Information that needs checking <p>Video Examples given of help that can be provided include “help with taxi fares”. I am not aware that LA’s are obliged to provide this. Should this be checked?</p> <p>assessments-wales-april-2025-26.pdf Page 9 – Examples of Support for Carers Full Factsheet Review The examples of support listed are very specific and may give the impression that these services will automatically be provided by the Local Authority following a carer’s needs assessment. This could create unrealistic expectations, as a needs assessment is intended to identify needs and determine appropriate outcomes — not guarantee specific services. Should we verify whether these examples are statutory requirements for Local Authorities or simply illustrative? Currently, they risk raising expectations among carers about what Local Authorities must provide, rather than focusing on the principle that support should be tailored to assessed needs.</p> <p>Excerpt from the factsheet: “Some examples of the kind of help that could be</p>

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		<p>There isn't any good practice guidance for officers. Should a link be included on this website to where it is stored e.g. Social Care Wales?</p>	<p>available for you as a carer if you are eligible for support:</p> <ul style="list-style-type: none"> • Help with getting around • Taxi fares • Driving lessons • Repairs and insurance costs for a car where transport is crucial • Technology to support you (e.g., a mobile phone or computer where access to library services is not possible) • Help with housework or gardening • Support to relieve stress, improve health, and promote well-being (e.g., gym membership) <p>Assessments in Wales - An Easy Read guide</p> <p>Similarly the easy read document gives the impression that services will automatically be provided by the Local Authority following a carer's needs assessment.</p> <p>Needs Assessment Information – P10</p> <p>Having both a needs assessment and carers needs assessment on the same sheet, may give the impression that one assessment will naturally trigger the other. Whilst in theory undertaking both assessments together is best practice it doesn't make it explicit that the cared for can refuse an assessment/support. In turn this may result in a carers needs not being able to be met.</p> <p>The example below does not make it explicit that the cared for must give consent, unless they've been assessed as not having mental capacity to having an assessment. See example below.</p> <p>P12 -</p>
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			<p>“Where it appears to a local authority that an adult may have needs for care and support, they have a duty to make an assessment regardless of the local authority’s view of the level of need for care and support or the level of financial resources that may be available to the adult.”</p>
		<p>Are there any gaps in resources?</p> <p>P14. Factsheet “Information and advice Everyone, including adults whose needs are considered not to be eligible for support, must receive information and advice from the local authority on all of the following:</p> <ul style="list-style-type: none"> • the care providers and services they can choose from their locality • how to obtain financial advice • how to raise concerns about safeguarding, i.e. what to do if there are concerns that a vulnerable person is at risk of harm or neglect • how to access preventative services that could delay or prevent their needs from increasing <p>Young Carers – p17 Explanation of YC’s assessment is very brief. Not clear enough for practitioners.</p> <p>For parent carers of disabled children p18</p>	<p>What could be done to fill those gaps? National standardised explanation of what is meant by “not to be eligible for support” and what is “eligible for support”.</p> <p>Sometimes professionals do not fully understand what falls under eligible and not eligible for support. This may explain discrepancies in support across Wales.</p> <p>Provide an explanation as to what is meant by preventative services.</p> <p>More guided support for practitioners. More information about identifying and assessing whether there is an adult in the caring network. For example, in Monmouthshire through this approach we have been identifying more adult carers, who didn’t recognise themselves as such nor did other professionals eg education recognising there might be an adult in the caring network.</p> <p>This is something that many carers assessment workers would not be qualified to undertake. They</p>

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	<p>“whether it is appropriate for the parent to provide, or continue to provide, care for the disabled child, in the light of the parent’s needs for support, other needs and wishes.”</p> <ul style="list-style-type: none"> Do they provide the information needed to help an officer carry out a Carers Need Assessment? <p>No</p>	do not have the authority or training to make this decision. The wording of this should be reviewed.
<p>Carers Trust (Wales)</p> <p>General Overview: Information is aimed at carers, not at professionals. Main page Information is UK Carers generic and Wales site is predominately resources available in Wales. It does though include YC’s information.</p>		
<p>Websites and Resources Researched</p> <p>Carer's Assessment - What is covered? Carers Trust Video – Wales</p> <p>Our work in Wales - Carers Trust Carer Services Near Me Carers Trust Local Carer Centres</p>	<p>How easy are these resources to navigate?</p> <p>Video</p> <ul style="list-style-type: none"> is visually appealing Easy to understand Helpful for carers Explains that it’s not just LA’s you need to inform Highlights Young Carers Explanations of rights are clear Explains where support can come from, e.g. third sector, community support, health professionals Rights to Carers Needs Assessment explained simply <p>Written Information</p> <ul style="list-style-type: none"> Information for professionals is available. Is quite generic and for the whole of the UK. There’s a lot of resources based around Scotland. 	<p>Information that needs checking</p> <p>When inputting a postcode or location it didn’t bring up Carers Services in different localities. Areas tested, Monmouth, Torfaen, Newport.</p>
	<p>Are there any gaps in resources?</p>	<ul style="list-style-type: none"> What could be done to fill those gaps? <p>The Wales site isn’t a page that professionals would find useful, and carers would be gaining generic</p>

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		<ul style="list-style-type: none"> Information for Wales is more about what work Carers Trust Wales do, eg grants, short breaks scheme, policy work. Not specifically targeted at carers and professionals 	information from the main Carers Trust page (apart from the video which is Wales specific).
<p>Carers: help and support - Citizens Advice</p> <p>General Overview – Easy to read and straightforward information aimed at Carers, not aimed at professionals.</p>			
<p>Websites and Resources Researched</p> <p>Carers: help and support - Citizens Advice</p>	<p>How easy are these resources to navigate?</p> <ul style="list-style-type: none"> Easy to find the page Not too much information on the page to make it overwhelming Explanations - practical help, where to get help, an assessment very straightforward Straightforward information and links to financial help Other help information useful Provides a Direct Carers Chat On line chat for Carers <p>The page whilst not visually appealing is straight forward, gives informative information with links directly to the relevant agencies.</p> <ul style="list-style-type: none"> Do they provide the information needed to help an officer carry out a Carers Need Assessment? <p>This page is aimed at carers and not professionals. No</p> <ul style="list-style-type: none"> Are there any gaps in resources? N/A What else would you like to see included in good practice guidance for officers carrying out Assessments? N/A 		

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Age UK			
<i>General Overview. Information is aimed at carers, and is more UK Carers generic.</i>			
	<p>Websites and Resources Researched</p> <p>Advice for carers downloadable information guide Age UK</p>	<p>How easy are these resources to navigate?</p> <ul style="list-style-type: none"> • Easy to find page • Well laid out • Some visuals • Information is generic and talks about providing a personal budget. This is not the case in Wales • Helpful check list • Clear side tabs to reference specific topics for a carer <p>Do they provide the information needed to help an officer carry out a Carers Need Assessment?</p> <p>This page is aimed at carers and not professionals. No</p> <p>Are there any gaps in resources? N/A</p> <ul style="list-style-type: none"> • What else would you like to see included in good practice guidance for officers carrying out Assessments? N/A 	
Carers Wales			
A Range of Resources aimed at Social Workers, Pharmacies and Hospital Discharge			
	<p>Having conversations with carers Carers Wales</p> <p>Working with Carers – A Conversation with Allison Hulmes</p>	<p>How easy are these resources to navigate?</p> <ul style="list-style-type: none"> • I didn't find this video, when I did a search. Someone else told me of the existence of this page. • The video is embedded under Carer Aware – Resources – who is an unpaid carer. 	
		<p>Do they provide the information needed to help an officer carry out a Carers Need Assessment?</p>	

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	<ul style="list-style-type: none">• The video used the voice of a carer to explain their experience of a carers needs assessment.• The terminology used “disclose the things I’m most sensitive about” and “it’s not a comfortable experience” makes it appear that a social care professional is undertaking an interrogation exercise. It’s already setting the tone that there is you and us dynamic. It appears as if a CNA could be a negative experience for the carer, with the position of power held by a social care professional.• The use of listen, empathy and acknowledged is used, which is good for social care professionals to engage in. Emphasising it’s a collaborative relationship is a positive angle too.• The example of full-time working showed the range of carers we will come into the contact with.• Goal of social workers is to be an assessor – one that helps carer to articulate their role. Good point made.• Video shows two people in masks talking over a desk. It is not a realistic image of how a CNA is undertaken. This portrays an image of a very formal discussion, not the informality yet professional approach that many assessments take.• “Miracle Question” is being posed in the video that professionals should ask. What is a	
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		<p>preferred future for you? What is a good work life balance?" Good point made.</p> <ul style="list-style-type: none"> • Carers Plan – steps to get there. Maybe this should include realistic expectations, how to work with a carer for realistic outcomes. Carers can often say I want them to get better or for them to not have X. Relooking at steps to get to a realistic future, should also include managing expectations, and being realistic about circumstances. • Points of Social Workers to consider were good. <ul style="list-style-type: none"> – Understanding your role in assessment – Discusses type of questions to use. – Focus on strengths. – Explore family situation. – Using summary and reflection. – Challenges. • Know your duties under the legislation. <ul style="list-style-type: none"> – This angle is coming from a Social Worker perspective. – Not all assessors are Social Workers or have the qualifications that necessitate them to know the legislation inside out. – This video is indicating that an assessor is a Social Worker. • Referrals do not always have enough information about a carer which hinders the Social Worker's ability to do their homework on a carers background. Many referrals just say carers needs assessment requested. 	
		<p><i>Are there any gaps in resources?</i></p>	

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		<p>Centred around an adult caring for an adult. Not a young person caring for an adult/young person.</p> <p>More work needs to be done to ensure referrals are more robust and informative. How to provide an effective carers referral.</p>	
		<p>What else would you like to see included in good practice guidance for officers carrying out Assessments?</p>	
<p>Understanding carers rights Carers Wales</p> <p>Introduction to SSWB Act</p> <p>Good Practice Principles for social workers Carers Wales</p> <p>Good Practice Principles and Tips</p>	<p>Shares Legal Information about SSWB</p> <ul style="list-style-type: none"> • Video (Good Practice) Explains its for Social Workers which is therefore explicitly saying a Carers Needs Assessment is undertaken by a Social Worker. • Some of the points being made are not achievable. Carers Wales advocate notifying carers of staffing changes – this is not attainable. • Contingency plan conversation is useful – that is not necessarily done as part of an assessment. • Using word “loved one” – in discharge process. This assumes there is a loving relationship between carer and cared for. When some instances there isn’t. • End of life care planning carers assessment. It isn’t always appropriate to do this, and who is the right person to have this conversation. This should be explored more. 	<p><i>How can changes be made</i></p> <p>It would be helpful if the organisations providing these training video could demonstrate they have been involved in Carers Needs Assessments e.g. working alongside Social Care Professionals and seeing firsthand how one is undertaken. Having a working perspective helps to shape training/information in a more informed way.</p> <p>Providing more training for social care workers on how to approach and how to encourage carers to put contingency plans into place.</p> <p>Reviewing the terminology “loved one”. This inadvertently puts a pressure on carers that do not love the person they care for, in a position that they should love them.</p> <p>This needs more work. I have seen examples where a CNA has been requested and those undertaking CNA’s are not trained to manage this process. Sometimes a CNA at this stage can be very</p>	

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			upsetting, and if not referred appropriately or managed appropriately can be very unhelpful or distressing.
		<p>What else would you like to see included in good practice guidance for officers carrying out Assessments?</p> <p>Positive videos of a Carers Needs Assessment Exploring other ways that carers can be supported by professionals. Contingency planning End of Life</p>	Videos that show carers and social care professionals talking about the positive impact of undertaking and having a carers needs assessment. I couldn't find videos of social workers talking about it from their perspective. Also talking about other ways to talk about the caring role. A carers needs assessment is the only route for support for carers. Professional helpings carers find their own network of support is equally as empowering for carers.

Summary: Carer Aware – Support for Social Care Professionals

Visibility and Accessibility

- The page was not found through the main Carers Trust website, which questions whether social care professionals would know it exists or be likely to access it.

Focus of the Training

- The Carer Aware Training video is aimed at healthcare professionals, especially *student nurses in hospital settings*.
- The Social Care training video whilst labelled “interactive,” is essentially a presentation-style video with slides and voiceover, which may reduce engagement for social care staff.

Placement of Social Care Content

- Information for social care professionals appears only partway down the page, not prominently.
- Links lead to the “Carer Aware Resources for Professionals” page, which again opens with healthcare resources first, with social care content positioned further down.

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Social Care–Specific Resources Provided

The page includes:

- *Good Practice Principles and Tips for Social Workers* (PDF)
- *Principles for carers: getting the most out of your relationship with your social worker* (PDF)
- *Good Practice Principles for Social Workers* (YouTube)
- *Working with carers – A conversation with Allison Hulmes* (YouTube)
- *Some resources link externally* (YouTube).

Overall Assessment

- The Carer Aware offer does provide some materials relevant to social care professionals, but:
 - The primary focus is clearly healthcare, not social care.
 - Social care content feels secondary, less visible, and less tailored.
 - It is unlikely that social care professionals would:
 - Know where to find these resources, or
 - Recognise the training as relevant to their role.

Conclusion

The current structure and emphasis suggest that Carer Aware does not strongly support social care professionals, as the resources are:

- Harder to locate,
- Less prominently displayed,
- Not clearly positioned as training for social workers.

Overall View

- The main third sector carer organisations cover the whole of the UK. These are limited in numbers.
- Third sector carer services are broken down into regions across the UK. Not all come under the main carer organisations, therefore some information would appear to be specific to their locality/region.

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- Some third sector information is aimed primarily for Carers with limited resources for professionals to draw upon.
 - Resources provided for professionals are more for them to share with carers, rather than aid them in how they support a carer.
- Carers Wales information for professionals is available. However, putting training for professionals under the banner of Carer Aware and Resources, doesn't make it explicit that it's training resources for professionals.
- Some of the terminology makes it appear as if certain aspects of a carers need assessment will guarantee that what a carer wants will be and must be provided by the LA e.g. taxi fares, costs towards a car.

Appendix E: Review of the Working with Unpaid Carers resources and training materials on the Social Care Wales website to assist practitioners in carrying out Assessments

(Link: [Working with unpaid carers | Social Care Wales](#))

Area of review	Research Points	Areas of best practice	Areas of improvement	Conclusion or Suggestions for improvement
<p>Main page</p> <p>(Powys)</p> <p>Web page of approx 760 words with links to other documents</p>	<p>How easy is it to navigate?</p>	<p>There are section headings and a 'contents' section which allows you to navigate to each section</p>	<p>The page sits under 'Social Workers' but it shouldn't as many doing the work will not be social workers</p> <p>The link to the e-learning does not take you to the e-learning, and the e-learning cannot be accessed. The link to SCIR practice examples doesn't work</p> <p>The web page is text heavy which may limit accessibility, particularly to those with additional needs such as dyslexia, visual impairment, neurodiversity or alternative learning preferences e.g. visual or auditory learners. There are a number of resources to click through to, some of which are lengthy</p>	<p>The page may not be easy to find for those who would find it useful. The webpage is text heavy and so may not be accessible. It also does not contain easy to read summaries – a better approach may be to have quick read summaries on the main page, with links to longer and more in depth resources as needed.</p> <p>The e-learning link does not work, meaning that this resource is not accessible. This needs reviewing and resolving</p> <p>The link to SCIR Practice Examples: Preventative support for adult carers in Wales does not take you to the correct webpage/article – it takes you to an online article titled 'Who owns standards of care – and how do we make them work?' from 11/12/2025: Who owns standards</p>

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Area of review	Research Points	Areas of best practice	Areas of improvement	Conclusion or Suggestions for improvement
				of care—and how do we make them work? - SCIE . This needs reviewing and correcting
	<p>Does it assist you with the information needed to carry out a Carers Need Assessment?</p>	<p>It contains links to resources that provide advice on assessing carer’s support needs including a training manual, training slides, self-training workbook and a practitioner toolkit.</p>	<p>These are relatively large documents and could be provided in a more accessible format. Care workers are likely to have a high case/workload and so may find the resources impractical to access and utilise.</p> <p>On the landing page, it does not give clear or step-by-step advice on how to carry out a Carers Need Assessment, and due to the accessibility issues discussed above, it may be difficult to find the information needed. To find information on how to assess carer’s needs you have to click through to the other resources.</p>	<p>Instead of having to click through to resources to find the information on how to assess carer’s needs could be better displayed in an accessible format on the landing page, with the options of video/audio information. The information should provide practical details on how to complete the assessment, and shouldn’t be too long, so that it is more likely to be used by those it is aimed at. There could then be links to further information as needed, with details of what each resource does/contains</p>
	<p>Are there any gaps?</p>			
	<p>Is there anything else you would like to see included in training resources, e.g. video examples of conversations with social care</p>			<p>More practical information available on the webpage without having to click through to links to access resources initially.</p> <p>Details on what each of the linked resources contains and when/how they can be used</p>

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Area of review	Research Points	Areas of best practice	Areas of improvement	Conclusion or Suggestions for improvement
	practitioners who are familiar with carrying out assessments?			<p>A more accessible format with summaries and structured information to provide practical guidance on how to assess carers needs, or a breakdown of what resources contain and how they will help with this</p> <p>A clearer explanation on who the resources are focussed at and how they can use them</p>
<p>Assessing Carers' Support Needs - Resource A – Training Manual</p> <p>(Cardiff and the Vale)</p>	<p>How easy is it to navigate?</p>	<p>Provides context of who the resource is aimed for - trainers of practitioners completing CAs as well as those generally working with unpaid carers. Fairly easy to navigate, table of contents given with relevant topics. Each slide is displayed with facilitator notes so full picture of what should be discussed is given.</p>	<p>Table of contents could be hyperlinked to take to your relevant section more easily as the document is large. Training manual includes links to videos that form the training material, not able to access accompanying videos due to issue with permissions. Document created in Jan 2019, so would be beneficial to review content and update, considering new legislation e.g. Carers Leave Act.</p>	<p>Table of contents hyperlinked. Content to be reviewed and updated as this was developed 7 years ago.</p> <p>Video links to be reviewed to ensure they can be accessed.</p>
	<p>Does it assist you with the information needed to carry out a Carers Need Assessment?</p>	<p>Yes, document is comprehensive and provides both how to complete a Carers Assessment, but always includes context of a caring role, underpinning legislation, how to prepare for an assessment. Training resources</p>	<p>Some hyperlinks in footnotes and toolkit are not working and take you to an error page. Very informative manual but consideration could be made as to whether it should be reduced</p>	<p>Review of hyperlinks and videos as not all are working.</p>

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Area of review	Research Points	Areas of best practice	Areas of improvement	Conclusion or Suggestions for improvement
		<p>also provides practical skills on completing a collaborative conversation and what should be considered – open questioning, reflecting.</p> <p>Good use of case studies to provide real-life context. Training manual includes exercises for participants to complete</p>	into a few manuals for specific topics e.g. young carers.	
	Are there any gaps?			
	Is there anything else you would like to see included in training resources, e.g. video examples of conversations with social care practitioners who are familiar with carrying out assessments?			As training is based on how to complete a Carers Assessment, practitioner viewpoints through videos would be beneficial. There could also be more summary 'desk aids' with main points on each topic, as manual is lengthy and text-dense.
Assessing Carers Support Needs - Resource B – Training Slides (Powys)	How easy is it to navigate?	The first slide after the title page contains a breakdown of what will be covered (aims and learning outcomes) so it is clear what the slides contain	<p>There is a large number of slides</p> <p>The Welsh and English versions are on the same slide deck – this makes the slide deck longer and more cluttered than it needs to be and it may be clearer and</p>	As the slides were created to use alongside a training course, they contain a lot of information, but a lot of it lacks sufficient detail to be useful in a practical way without the accompanying training provision. A specific tool should be created to provide the

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Area of review	Research Points	Areas of best practice	Areas of improvement	Conclusion or Suggestions for improvement
<p>57 slides, each slide half Welsh, half English, or full slides in English and Welsh consecutively</p>			<p>more accessible if separate versions were provided.</p> <p>Does have video links included to add different formats to the slide deck, but one link goes to a 'private video' on YouTube which cannot be accessed, the next goes to an error 404 page not found.</p> <p>The slide deck is long and contains a lot of info but not but also lacks some detail and/or usefulness – some of the info is useful, but it seems it would be more useful accessed as part of the relevant training course (as appears to have been originally intended) and is less useful as a standalone tool.</p> <p>The format is ok, but it may be useful to have a specific slide deck or similar tool developed separate from the training slides, so the information is easier to understand and apply.</p> <p>A lot is covered, but some context is lacking when accessed independently from the training element.</p>	<p>information independently from the training provision, which can be used in a practical way and contains a summary of relevant information, and the steps to take when assessing carer needs</p> <p>Having Welsh and English versions on the same slide deck make the deck overly long and appear cluttered</p> <p>Video links do not work</p> <p>Details of relevant resources to sign-post to for support for carers should be included e.g. Credu, Carers Trust, DEWIS</p>

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Area of review	Research Points	Areas of best practice	Areas of improvement	Conclusion or Suggestions for improvement
			<p>A clearer summary of what to do for an assessment, step by step, would be a useful inclusion, set out in a way that can be utilised in practical situations</p>	
	<p>Does it assist you with the information needed to carry out a Carers Need Assessment?</p>	<p>Yes, it does provide info on carers need assessment (assessing needs of carers, context and implications for carer support, barriers to identifying carers, carers rights to assessment, collaborative communication, recording, understanding outcomes, reviewing progress)</p>	<p>As above, a stand-alone resource not linked to a specific training course could be useful, and could be laid out in a way that provides step-by-step guidance on how to assess the needs of carers presented in a way that could be utilised in practical settings</p>	
	<p>Are there any gaps?</p>		<p>Context and relevant detail is missing, as the slides were developed to be accessed as part of a training course</p> <p>A slide mentions that, after an assessment, social services must provide carers with info and advice on local services to prevent their needs from further developing – would be good to provide details of some relevant resources such as Credu, Carers Trust and DEWIS to assist practitioners with this sign-posting</p>	

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Area of review	Research Points	Areas of best practice	Areas of improvement	Conclusion or Suggestions for improvement
	Is there anything else you would like to see included in training resources, e.g. video examples of conversations with social care practitioners who are familiar with carrying out assessments?		<p>The video links in the slides do not work – it would be good if these were accessible</p> <p>A checklist/step-by-step guide to assessing carer needs</p>	
Assessing Carers' Support Needs - Resource C – Practitioner Self-Training Workbook (Cardiff and Vale)	How easy is it to navigate?	Provides context of who the resource is aimed for, self-training manual for practitioners completing CAs as well as those generally working with unpaid carers. Fairly easy to navigate, table of contents given with relevant topics. Good use of diagrams to try and break up large portions of text.	Table of contents could be hyperlinked to take to your relevant section more easily as the document is large. Training manual includes links to videos that form the training material, not able to access accompanying videos due to issue with permissions. Document created in Jan 2019, so would be beneficial to review content and update, considering new legislation e.g. Carers Leave Act.	Table of contents hyperlinked. Content to be reviewed and updated as this was developed 7 years ago. Video links to be reviewed to ensure they can be accessed
	Does it assist you with the information needed to carry out a Carers Need Assessment?	Workbook is comprehensive and provides both how to complete a Carers Assessment, but always includes context of a caring role, underpinning legislation, how to prepare for an assessment. Good use of reflective exercises	Some hyperlinks in footnotes and toolkit are not working and take you to an error page. Very informative manual but consideration could be made as to whether it should be reduced into a few manuals for specific	Review hyperlinks included. Use of summary pages/desk aids to support onward learning.

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Area of review	Research Points	Areas of best practice	Areas of improvement	Conclusion or Suggestions for improvement
		<p>within the workbook to embed understanding and provide a practical activity to complete to break us</p> <p>Training resources also provides practical skills on completing a collaborative conversation and what should be considered – open questioning, reflecting.</p>	<p>topics e.g. young carers There could also be more summary 'desk aids' with main points on each topic, as manual is lengthy and text-dense.</p>	
	Are there any gaps?	None identified.		
	Is there anything else you would like to see included in training resources, e.g. video examples of conversations with social care practitioners who are familiar with carrying out assessments?			As training is based on how to complete a Carers Assessment, practitioner viewpoints through videos would be beneficial. There could also be more summary 'desk aids' with main points on each topic, as manual is lengthy and text-dense.
Assessing Carers' Support Needs - Resource D – Practitioner Toolkit	How easy is it to navigate?	Great index on page 2 which has automatic hyperlinks to each of the pages 😊		
<p>(Powys)</p> <p>32 page document</p>	Does it assist you with the information needed to carry	It has a link to the Carers Wales Assessments A Guide to Getting an Assessment in Wales (2016). Suggests this is a great resource setting out legal requirements for		

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Area of review	Research Points	Areas of best practice	Areas of improvement	Conclusion or Suggestions for improvement
	out a Carers Need Assessment?	assessments in a clear user-friendly fashion.		
	Are there any gaps?	Link covers both young and adult carers. And there's a document you can share with carers prior to an assessment or give you discussion points in advance of an assessment visit.		
	Is there anything else you would like to see included in training resources, e.g. video examples of conversations with social care practitioners who are familiar with carrying out assessments?			This looks to be the most comprehensive document I've looked at in this collection.
E-learning resource to help raise awareness of carers: Access the resource on the the NHS learning website (Powys)	How easy is it to navigate?		Takes you to a generic page and not the course – I couldn't find the course within 30 seconds (Nia has a link on Powys intranet) I found the training more by luck than judgement! Therefore, this definitely needs improvement.	Link from Powys intranet/training page doesn't work. It allows you to enrol from a Powys perspective, but then the link to the course doesn't allow access. Searched via main NHS page but it requires an enrolment key – the generic Powys one doesn't work. Unable to access course

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Area of review	Research Points	Areas of best practice	Areas of improvement	Conclusion or Suggestions for improvement
	Does it assist you with the information needed to carry out a Carers Need Assessment?		Doesn't mention CNA until the very end. Doesn't tell you how to carry out a CNA.	
	Are there any gaps?			
	Is there anything else you would like to see included in training resources, e.g. video examples of conversations with social care practitioners who are familiar with carrying out assessments?		Has a continue button in each of the examples of whether the person is a carer or not. But the button doesn't progress you, it just loops you back to the start of the example you are on.	
<u>Preventative support for adult carers in Wales: a rapid review (20 page report from 2018)</u> (Cardiff and the Vale)	How easy is it to navigate?	The document has a clear structure with a table of contents and provides context for this document – for this review will help inform the development of Social Care Wales's service improvement planning from 2017-2022.	This document is out of date as it is a review and next steps covering the period of 2017-2022. It does not seem to fit within the overarching topic of 'resources and training materials'. Lack of context as to who this is aimed at, what the benefits of the review are as practitioners. Report is extensive with dense paragraphs of text.	This document is out of date, not fit for purpose and does not fit within the context of training materials. Perhaps Carers Wales State of Caring Report would be more beneficial to include, as covers similar themes.

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Area of review	Research Points	Areas of best practice	Areas of improvement	Conclusion or Suggestions for improvement
	Does it assist you with the information needed to carry out a Carers Need Assessment?	The review does provide context including underpinning policy, the makeup of Carers in Wales and issues surrounding identification. Gives examples of good practice across different themes and projects implemented by other LAs.	This document is out of date, not fit for purpose and does not fit within the context of training materials. Unclear who the intended audience is, but this review does not provide much information to carry out a carers assessment, but gives themes to consider and examples of best practice – could be utilised more for LAs to consider service development, but less for day-to-day practice.	
	Are there any gaps?			
	Is there anything else you would like to see included in training resources, e.g. video examples of conversations with social care practitioners who are familiar with carrying out assessments?			This document is out of date as it is a review and next steps covering the period of 2017-2022. It does not seem to fit within the overarching topic of 'resources and training materials'. Lack of context as to who this is aimed at, what the benefits of the review are as practitioners. Report is extensive with dense paragraphs of text. could be utilised more for LAs to consider service development, but less for day-to-day practice.
SCIE Practice examples: Preventative support for adult	How easy is it to navigate? The document is text heavy – it may be	Gives a detailed overview of the carers landscape in Wales and what support they may benefit from, but only briefly mentioned	The link from the main webpage does not take you to the correct article, it takes you to 'Who owns standards of care – and how do	This is a detailed document and provides a good overview of the landscape for carers in Wales, and what support can and should

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Area of review	Research Points	Areas of best practice	Areas of improvement	Conclusion or Suggestions for improvement
<p>carers in Wales (This does not link to the right article) Have saved pdf file to SharePoint as link does not take you to the correct document Preventative-support-for-adult-carers-in-Wales SCIE.pdf</p> <p>(Powys)</p> <p>24 page document</p>	<p>useful for those looking to go into more depth about the topics covered, but does not present a practical tool for completing Carer's Needs Assessments.</p> <p>It would be easier to navigate if the contents page allowed you to click through to each section without needing to scroll through the document</p>	<p>identifying needs, and lists carer needs assessment as one type of support and intervention – it does not give any information or advice on carrying out the assessment.</p>	<p>we make them work?' from 11/12/2025 – I had to search it directly via search engine to locate it. So this article is not accessible from the main list of resources.</p> <p>From 2018 – may need reviewing to ensure content is up to date, particularly in light of changes to services since the pandemic</p>	<p>be provided, but does not provide specific practical advice on Carers Needs Assessment. It may be useful as a tool for practitioners as background to an assessment, as it highlights what support and interventions may be useful but to be of use in a practical setting a summarised and/or more accessible version may be more useful and useable</p>
	<p>Does it assist you with the information needed to carry out a Carers Need Assessment?</p>		<p>No, it does not refer to completing carers needs assessments – it gives a detailed background on the landscape of unpaid carers in Wales, discusses what support they may benefit from and covers potential outcomes if such support is provided</p>	
	<p>Are there any gaps?</p>			
	<p>Is there anything else you would like</p>			

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Area of review	Research Points	Areas of best practice	Areas of improvement	Conclusion or Suggestions for improvement
	to see included in training resources, e.g. video examples of conversations with social care practitioners who are familiar with carrying out assessments?			
<p><u>Carers and the Social Services and Well-being (Wales) Act: Working with Carers learning resource.</u> (This is massive there are 25 linked resources under this link)</p>	How easy is it to navigate?	<p>Has a reasonable contents page at the start.</p> <p>Clear page and section headings. 'Overview' includes explanation of the two elements within the page – an overview (of the Act) and resources for unpaid carers (UC).</p> <p>Links take you directly to the external web resource, with an indication of the format and size of the linked doc.</p>	<p>Few of the research links, toolkits, or guidance, have a date of publication. Most are over 10 years old, and many have been subsequently updated.</p> <p>A brief explanation of what the linked resource provides is not included.</p>	<ul style="list-style-type: none"> - Overview – training module and summary - Case Studies - Resource pk – research - Resource pk – toolkits & guidance <p>Carers Wales have a Policy and Research section on their webpages and Carers Trust Wales have a Resources section. SCW could provide a link to these rather than to individual documents.</p> <p>Add dates of publication and a brief explanation to any links.</p>
	Does it assist you with the information needed to carry	<p>Summary – 4 page doc at first glance looks terrific!</p> <p>Case Studies – 2 pages, similar format to summary above. Just</p>	Reduce the size and wordy-ness of the Research documents. Not sure a carer or professional will have time to even scan read 94 pages.	Research - 5 docs – look to be much more wordy than the summary or the Case Studies – a total of 94 pages.

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Area of review	Research Points	Areas of best practice	Areas of improvement	Conclusion or Suggestions for improvement
	<p>out a Carers Need Assessment?</p>	<p>brief descriptions of carer situations</p> <p>It provides links with research from the two major Unpaid Carer Charities in Wales. Anyone working with unpaid carers in social care and health should be aware of these two key organisations and the resources and support available from them</p>	<p>The research is old and some of it has more recent versions available.</p> <p>It doesn't provide specific information to support a CNA or its delivery but gives information on research of the impact of caring, and in generic care giving situations, e.g. dementia. It is not a comprehensive range of research examples.</p> <p>The Toolkits and guidance is a mixture of a template for a guide for UC, a report on the benefits of supporting UC by the NHS, and a service improvement scheme for organisations supporting UC. Not really toolkits to assist CNA, or guidance.</p> <p>A huge amount of information contained on the landing page – a lot to look at and not very easy to navigate – no summaries or details without clicking through to the resource, and hard to keep track of which resource you have looked at and which you haven't</p>	<p>Toolkit & Guidance – 3 docs 12pg; 28pg; 10pg.</p> <p>Perhaps providing a link to the two organisation's research pages would enable the reader to search for documents relevant to their own role or area of interest, rather than selecting from a small (and quickly out of date) sample? And/or provide a link to the main regular reports such as the State of Caring (annual), WG Charter for UC Provide information and a link to Carers Wales Carer Aware programme, for access to resources for practitioners (including good practice).</p>

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Area of review	Research Points	Areas of best practice	Areas of improvement	Conclusion or Suggestions for improvement
			Carers resources pack – factsheets and briefings – many are 10 years old and so appear somewhat outdated – may need a re-fresh and update in light of the length of time that has passed	
	Are there any gaps?		Information on schemes, programmes, tools to improve service delivery/staff skills, and awareness	Information on national initiatives such as Employers for Carers, Carer Friendly, Carer Aware, Investors in Carers, etc. so that strategic leads can gain an overview and information about ways of delivering improvements for UC
	Is there anything else you would like to see included in training resources, e.g. video examples of conversations with social care practitioners who are familiar with carrying out assessments?			Training resources showing the CNA experience from a carers point of view. Tips for delivering an effective Joint Assessment (Carer and cared for)
<u>Demonstrating care skills to carers</u> (Powys)	How easy is it to navigate?			Straightforward. The document contains an intro and overview followed by a list of resources, sessions and their associated documents.

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Area of review	Research Points	Areas of best practice	Areas of improvement	Conclusion or Suggestions for improvement
	Does it assist you with the information needed to carry out a Carers Need Assessment?			This is a 55 page training pack resource includes lesson plans, presentations, activity sheets and feedback forms. The training is about care skills and nothing to do with CNA.
	Are there any gaps?			Doesn't look to have anything about completing a Carers Needs Assessment.
	Is there anything else you would like to see included in training resources, e.g. video examples of conversations with social care practitioners who are familiar with carrying out assessments?			

Appendix F: Topic 4 - Recording of information on Conversations with Carers:

When does an Assessment start?

From legislation – Social Services and Well-being (Wales) Act 2014 Part3 S24 (1) outlines where it appears to a local authority that a carer may have needs for support, the authority must assess. Therefore, when a conversation has started with a person to establish if a carer they have needs for support, an assessment has already started.

What should be recorded?

From legislation – Social Services and Well-being (Wales) Act 2014 Part3 S24 (4) in carrying out a needs assessment the local authority must – (a) assess the extent to which the carer is able, and will continue to be able, to provide care for the person for whom the carer provides or intends to provide care. S28 (2) A local authority may not combine a needs assessment for an adult with the needs assessment for another person unless exceptions a,b,c... This legislative guidance challenges a need for carers assessments to be recorded in their own right.

From legislation - Social Services and Well-being (Wales) Act 2014, specifically *The Care and Support (Assessment) (Wales) Regulations 2015*, there are specific requirements for how carer assessments are recorded.

Key legal regulations and guidelines regarding the recording of carer assessments in Wales include:

- **Written Records Required:** Upon completion of a carer's assessment, the local authority must create a written record of the results.
- **National Minimum Core Data Set:** To ensure consistency across Wales, a National Assessment and Eligibility Tool is used, requiring that assessments record specific "core data".
- **Key Information Included in Records:** The records must include:
 - The extent to which the carer is willing and able to continue providing care.
 - The personal outcomes the carer wishes to achieve.
 - Assessment of whether the carer works, wishes to work, or participates in education, training, or leisure.
 - Information and advice provided to the carer.
 - Details of how proposed support will meet identified needs.
- **Person-Centred Recording:** The records must reflect a strengths-based, person-centred approach.
- **Sharing and Consent:** The local authority must provide a copy of the written record to the carer and, if they consent, the person they care for.
- **Reviewable Records:** The assessment, and its subsequent record, must be reviewed if there is a significant change in the carer's circumstances.
- **Proportionality:** While a record must be made, it should be proportionate to the needs and circumstances of the carer.

Where is the information held?

Social Care Wales – informs that the Local Authority Social Services: The master electronic record is maintained within the adult or children's social services department of your local council.

Social Care Wales – informs that National Assessment and Eligibility Tool: Data is recorded using a standardized national tool that includes a "core data set" to ensure information can be updated and referred to by different practitioners.

Who needs to record information e.g. First Point of contact officers?

From identification of a carer, the gathering of information starts -

Should there be a consistent format across Wales?

Legislation – states that assessment must have Portability Across Wales: If you or the person you care for moves to a different area in Wales, the original local authority must make the assessment record available to the new council to ensure continuity of support

Below are two examples from a carers perspective of that asked above and how it relates to what they could possibly understand.

Health Authority Board	Aneurin Bevan (Gwent)	
Local Authority Newport	Website link/s Home Newport City Council Carers Newport City Council	Key Contact Rebecca Wilford
What to look for	<ul style="list-style-type: none"> • Carer Assessment process descriptions • “What Matters” conversation guidance • Forms or portals that show recording practices • Pathways for First Point of Contact • Where information is stored (WCCIS mentioned? local CRM?) 	
Evidence	<p><i>The Carers Assessment process starts with a simple conversation with a trained member of staff to find out how you can be supported as a person who looks after someone else.</i></p> <p>Support also available via Community Connectors webpage. Although unsure how this is all recorded. A more formal recording of details would be held via the CNA route. Unsure what the connectors record.</p> <p>CIW report in 2021 noted WCCIS as a means of collating and storing data. CIW report in 2025 (CIW Report 2025)</p> <p><i>4.7 Most carers' needs are identified and assessed in a timely way. The majority of carers feel recognised and valued, with their contributions acknowledged and supported. Carers have access to accurate and timely information about their rights and available support services, evidenced by resources such as a carers handbook, carers directory, and monthly newsletter. Some carers were unaware they had undergone an assessment. Support for carers would be strengthened by ensuring the outcomes of assessments are shared in a timely manner and that carers are clearly informed when they have undergone an assessment.</i></p>	
Track the Act 2024	There are multiple routes into support from Newport City Council (“NCC”) and multiple outcomes open to unpaid carers, depending on their presenting	

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	<p>need. Therefore, it is challenging to describe a standard journey of an unpaid carer.</p> <p>For an adult carer, they may self-refer for support into the Duty Social Work team, or via another team, such as the Community Connectors, Home First (hospital) team or a Long-Term Social Work Team.</p> <p>Various other routes mentioned. Additionally, speaking to carers at events was notes and no further support may have been required.</p> <p>Once adult carers are referred into NCC, their case will be triaged based on their presenting need, via a Duty desk function. Depending on the presenting need, initial contact will often be made by a Social Work Assistant to complete the What Matters conversation. If necessary, their case will be passed onto a Social Worker (if it hadn't been picked up by a Social Worker initially) to complete a full Integrative assessment and possibly a Care and Support Plan. At any point during this process the carers journey may end, once their needs have been met or if they disengage with the service.</p> <p>NCC do not recruit a worker solely for carers needs assessments, which are completed by many professionals, including Occupational Therapists, Frailty Team, Hospital Discharge staff, Disabled Children's Teams, Adult Learning Disability and Mental Health Teams, as well as Managed Care Social work Teams (adults & children's services). Annual workforce fluctuates due to recruitment timetables, so full time equivalent data is not available.</p>		
Outcomes	<p>From the research it can be said unpaid carers would need to have an assessment in order to have a more in-depth what matters conversation from evidence found. There is guidance in the document Carers Assessment that relates to 'what matters' and this being important, as well as what to think about and what is discussed during an assessment. On point 6 of the document, it mentions IAA.</p>		
Recommendations	<p>Could it be clearer to an unpaid carer that any help is help?</p> <p>In its simplest form:</p> <p><i>'We are here to help and support you, you may also need to have a CNA ...'</i></p> <p>CNA are just as important but may have more formal outcomes than just a discussion, equally just as important that may provide support and help but not require a full CNA</p> <p>A discussion can also lead to a CNA, but a connector may not make notes of issues raised and only referred to the SS dept, meaning the carer will then need to repeat their story again. How do you overcome this?</p>		
Local Authority Torfaen	<table border="1"> <tr> <td data-bbox="435 1760 1187 2045"> <p>Website link/s</p> <p>https://www.torfaen.gov.uk/en/HealthSocialCare/Caring-for-Someone/What-is-a-Carer/What-is-a-Carer.aspx</p> <p>https://www.torfaen.gov.uk/en/HealthSocialCare/Caring-for-Someone/Carerssupportservice/Carers-support-services.aspx</p> </td> <td data-bbox="1187 1760 1441 2045"> <p>Key Contact</p> </td> </tr> </table>	<p>Website link/s</p> <p>https://www.torfaen.gov.uk/en/HealthSocialCare/Caring-for-Someone/What-is-a-Carer/What-is-a-Carer.aspx</p> <p>https://www.torfaen.gov.uk/en/HealthSocialCare/Caring-for-Someone/Carerssupportservice/Carers-support-services.aspx</p>	<p>Key Contact</p>
<p>Website link/s</p> <p>https://www.torfaen.gov.uk/en/HealthSocialCare/Caring-for-Someone/What-is-a-Carer/What-is-a-Carer.aspx</p> <p>https://www.torfaen.gov.uk/en/HealthSocialCare/Caring-for-Someone/Carerssupportservice/Carers-support-services.aspx</p>	<p>Key Contact</p>		

Appendix G: Review of Terminology used for carrying out a Carers Needs Assessment

Introduction / Overview

This document summarises the key terminology and considerations relating to Carers Needs Assessments and advice and information. It aims to identify terminology that would benefit from standardisation, review what currently works well, and highlight areas for improvement from a social care practitioner perspective.

Key Terminology for Standardisation

The following terms have been identified as requiring consistent definitions across services:

- Carer / Unpaid Carer
- Social Worker
- Carers Assessment (There is evidence from carers that this is not a helpful term and can give the impression that the carer's ability to provide care is being assessed, alternatives provided from carers were less formal such as "Carers Support Options").
- Carers Officer / Support Coordinator (and similar titles)
- What matters conversation
- Personal outcomes
- Support Plan
- Well-being
- 'Eligibility'
- 'Mandatory'
- Respite / Short Breaks / Breaks from Caring

Would a Standardised Approach for Terminology be useful?

A general, standardised document given to individuals at the point they become carers would be beneficial. The Ombudsman 2024 investigation "Are we caring for our carers?" found a "postcode lottery" exists, partly driven by inconsistent use of terms and documentation among local authorities, carers report feeling overwhelmed by jargon and unclear authority communications and the term "carer's needs assessment" is sometimes interpreted as judgmental which can deter engagement. The Carers Wales – Track The Act 2024 report confirmed that significant variation in how terms like "assessment", "support plan", and "What Matters conversation" are used by local authorities which creates confusion and carers find language inconsistent across services and areas, which undermines comprehension and engagement.

Additionally, The Social Care Institute for Excellence Review of evidence relating to unpaid carers' needs assessments in Wales highlighted that unclear definitions could pose a barrier to carers self-identifying so standardised clear terminology would also be of benefit before initial contact with services.

Therefore, terminology should be standardised across the following areas:

- where to begin their journey
- what support is available
- who to contact for help and advice

The benefits of standardisation are:

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- Reduces confusion
- Ensures consistency and shared language (avoids jargon)
- Fairness
- Demonstrates compliance with legislation
- Improves data collection
- Promotes person-centred practice (consistently using terms such as ‘What matters’ or ‘personal outcomes’ keeps the assessment focused on the carer’s priorities and needs.
- Accessible language

There are a number of existing terminology guides, glossaries or embedded explanations which could be assessed for best practice to develop a single reference guide to improve consistency across Wales. Examples of which include:

- Carers Cymru (Credu) offers a comprehensive “Words and Terms” glossary explaining key terms like Advocacy, Domiciliary Care, Direct Payments, Residential Respite, Replacement Care, and Safeguarding. This supports carers in understanding typical jargon. [carers.cymru]
- Most local authority guidance uses clear language (e.g., “unpaid carer”, “carer’s needs assessment”) and provides preparatory materials that define the process and context of an assessment.
- Social Care Wales and the Welsh Government Code of Practice don’t offer glossaries but define terminology contextually (e.g., “what matters conversation”, eligibility, “well-being”) within their guidance resources.
- Carers Wales/Carers UK (Wales edition) clarifies terms like “assessment”, “eligibility criteria”, “support plan”, and “What Matters conversation”, emphasising the conversation is not a test.
- Alzheimer’s Society Wales differentiates between “care assessment” (for the person with dementia) and “carer’s assessment”, and explains terms like “eligible care need”, “financial assessment”, and “respite”.
- Carers Trust Crossroads West Wales defines what a carer’s assessment involves—“conversation”, “impact on your life”, “goals”, and “well-being”—but no dedicated glossary is provided.

There is also good practice to consider in evidence from Young Carers or guidance developed to support them:

- Flintshire Young Carers and Wicked Young Carers (WCD) Young Carers have developed plain language versions of carers assessments
- WWIC Young Carers Booklet explicitly acknowledges that many young carers don’t recognise themselves as such and thus avoids formal labels by using practical examples (“help with bathing,” “doing shopping”) to make the concept accessible.
- The PLOS One study (2024), based on interviews and focus groups with 133 young carers, reveals that professional language can be off-putting. What young carers value most are supportive relationships, confidentiality, clear and simple information, and being involved in decisions—not technical terminology.

It should also be noted that any efforts to produce standard documents or online information needs to be ‘Future proof’ (consider format/longevity of information).

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What Works Well

- Existing collaboration between organisations (e.g., Carers Wales)
- Commitment to improving consistency across regions
- Guidance leaflets/website information
- Carers Wales video guides

What Could Be Better

- Terminology varies significantly between regions and services
- Less use of jargon and unclear terminology
- Carers may feel unsure where to start or who to speak with
- Inconsistent availability of a basic, standardised introductory information pack for new carers across Wales
- Varied titles for similar roles can cause confusion (e.g., Carers Officer vs. Support Coordinator)

Conclusion

There is considerable evidence that terms need to be further explained in published information and advice and evidence from carers that the terminology can cause confusion. Therefore, clearer and more consistent terminology would improve the carer experience, reduce confusion, and support better engagement with services. Standardisation would benefit both carers and practitioners by improving communication and expectations.

Recommendations for Improvement

- Consider further research on terminology usage and its impact on carers' understanding and engagement. (Focus group with carers.)
- Involve carers in language development and co-produce terminology
- Develop a **standardised terminology guide** to be used across all Welsh local authorities.
- Promote simplification
- Create a **basic introductory information document** for new carers, explaining key roles, processes, and support routes.
- Explore co-produced video guides with 'mock assessments' to help reduce anxiety and 'bust myths'

Appendix H: Review of resources available to support social care staff in helping carers access Direct Payments

National Framework and Code of Practice

The Code of Practice under the Social Services and Well-being (Wales) Act 2014: includes requirements around offering direct payments and charging policies, guiding staff on financial assessment and client choice.

The Charter for Unpaid Carers: Sets out carers' legal rights, including the right to assessment, information, advice, and choice—with practical examples of good practice for professionals supporting unpaid carers.

Good Practice, Information and Feedback from Local Authorities

Good practice and feedback has been provided from a number of areas:

Torfaen, Flintshire, Wrexham, Vale of Glamorgan, Conwy, Pembrokeshire and Merthyr learning shows that high-quality Carers Direct Payments are rooted in personalised, outcomes-focused assessments that truly explore what matters to each carer. Torfaen's flexible examples — from leisure cards and Tai Chi, to short breaks, respite, and activity-based support delivered by a care worker — illustrate how Direct Payments can sustain a caring role by meeting the carer's own wellbeing needs rather than substituting for the cared-for person's support. Flintshire's guidance reinforces the value of creativity, noting that arrangements vary widely and can include therapeutic activities, equipment, hobbies, or enabling carers to access meaningful time for themselves, with the overarching aim of maintaining resilience and independence. Pembrokeshire's feedback aligns strongly with this emphasis on flexibility enabling carers to arrange support that genuinely fits their lives.

However, feedback also highlights common barriers: many unpaid carers struggle to understand that eligibility is based on assessed need, leading to disappointment when needs fall below the threshold, or confusion when financial contributions apply to the cared-for person but not to the carer. This makes broad, generic promotion challenging and underscores the importance of targeted communication through assessments, care planning and partnership pathways. Pembrokeshire also notes that the challenges mirror those seen in Direct Payments more generally. While flexible, Direct Payments require carers to arrange and manage their own support, including sourcing suitable provision, handling responsibilities, and understanding employer-related aspects where relevant.

Additionally, research notes recording ambiguities, inconsistent guidance for practitioners, low public awareness, and increasing scrutiny around demonstrating alternatives before approval — all of which point to a need for clearer frameworks, proportionate processes, and strengthened workforce confidence.

Overall, the combined evidence highlights that the strongest practice is flexible, clearly communicated, well-guided, and grounded in enabling carers to continue caring safely, sustainably, and with dignity.

Across several Welsh local authorities, carers are supported to use Direct Payments through a mix of clear guidance, practical tools, and dedicated support services.

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For example, Flintshire provides a comprehensive offer including a carers-specific leaflet explaining how Direct Payments can fund personalised support (such as respite, social activities, and PA support), alongside a detailed welcome booklet covering employer responsibilities, budgeting, DBS checks, payroll, micro-care options, and managed accounts, all backed by a specialist support team.

Denbighshire offers web guidance and downloadable resources that encourage carers to begin with a Carer's Needs Assessment and then choose between a direct payment, council-managed, mixed, or third-party arrangement, with practical explanations on how payments are calculated and managed, including the use of PAs, agencies, and micro-providers. There are some good examples of carers getting together with other parent carers and pooling Direct Payments and even continuing and leading to the setting up of a social enterprise. Adding to the choice available and supporting the ethos of the Act.

Ceredigion supports carers through a structured Direct Payments hub that includes welcome guides, clear eligibility information and creative ways payments can be used, with handbooks and checklists aligned to statutory requirements.

Cardiff provides extensive online information explaining eligibility (including carers aged 16+), the flexibility Direct Payments offer, and how funds can be used; carers also have access to a commissioned Direct Payments Support Service for help with recruitment, payroll, training, legal setup, managed accounts, and medication support standards for PAs.

Powys outlines the core principles and conditions for Direct Payments through its online guidance and supports carers via an in-house Information, Advice and Support service that assists with employer responsibilities, DBS processes, payroll, financial management, and ongoing record-keeping.

All 22 authorities have policies or information indicating support for Direct Payments and 20 out of 22 explicitly mention unpaid carers as eligible. In a review conducted using AI across all websites for the 22 authorities comparisons were made in a number of areas which demonstrate that there are inconsistencies in the way DPs for carers are offered and the rules applying to them, an example of which is the inconsistency as to whether DPs can be used to pay relatives. Please note that the information that AI has been able to extract may not be 100% accurate, however, if AI is unable to ascertain accurate information this could indicate that carers would also find it difficult.

In recent years, Conwy has seen a significant increase in the number of Carers Direct Payments, with a 655% improvement. This growth reflects a strategic and collaborative approach to embedding Direct Payments (DP) as a core service delivery option for carers.

Key contributing factors include close working with Carers Officers and Social Work staff to ensure DP is routinely offered following holistic assessments, consistent reference to DP in public presentations to carers groups, strategic leadership through membership of the Strategic Carers Group, and direct engagement with elected members to raise awareness and advocacy.

Direct Payments have been used flexibly to provide alternative respite, enable family holidays, purchase equipment to reduce reliance on traditional services, support carers to gain driving independence, and facilitate pooling of Direct Payments across children's, adult disability and older people's services. These approaches have delivered improved wellbeing, reduced distress for cared-for individuals, and more sustainable caring arrangements.

Key learning highlights the benefits of providing Direct Payments to both carers and cared-for individuals, the need to further develop pooling opportunities, and the importance of expanding the micro-carer market to offer flexible, ad-hoc support options for carers unwilling or unable to become employers.

What Carers and organisations providing support to carers say about DPs

In the findings report from Carers Wales for the Ministerial Advisory Group Focus Groups there is no direct mention of Direct Payments. However, carers do talk about:

- Feeling that support is being “withheld”, partly due to *no PAs being available* — e.g., *“There is no money, there are no PAs, so LA staff... are putting up roadblocks...”*
- Struggles accessing consistent support across Wales (“postcode lottery”).
- Having to “fight” for services or assessments.
- Delays, lack of clarity, and inconsistent communication.

While not explicit, some of these concerns may indirectly link to experiences carers have with direct payments, especially where DPs rely on PA availability and LA processes.

Carers Wales provides one of the clearest guides on Direct Payments specifically for Wales. They explain:

- What Direct Payments are
- How they work for carers vs. for the person you care for
- How to arrange them through your local authority
- Benefits and responsibilities
- Mixed packages, assessments, and financial considerations

Citizens Advice provides clear and practical Direct Payments guidance for Wales, including:

- Eligibility
- How to use Direct Payments
- Reviews and responsibilities
- Using Direct Payments for carers, children, and adults
- Restrictions (e.g., paying family members)

Social Care Wales Direct Payments Guide (updated 2025) provides:

- National guidance for Wales
- Case studies
- Practice standards
- Myth-busting and examples of flexible use – this includes the myth that payments are only for people with a disability and states that carers 16+ are eligible

Websites for other carers organisations seem to concentrate more on carers allowance, financial hardship, other benefits and ‘small grants’ or one-off direct payments (which can be called direct payments) rather than a regular direct payments for the carer.

Recommendations

- Develop a Specific guidance for staff and carers for Carers Direct Payments including clear eligibility with examples (guidance can sometimes appear more applicable to the cared for causing confusion)
- Increase public awareness and involve third sector
- Produce a short, plain English/Cymraeg carers leaflet explaining how to access Direct Payments, typical uses (breaks, wellbeing, training), and direct contact points (using Flintshire’s leaflet as a model.)

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- Develop a consistent offer across Wales and resolve areas of ambiguity such as the payment of relatives.

Appendix I: Topic 7 – Training and Qualifications for social care practitioners carrying out assessments

What is the conflict between the Code of Practice and the legislation?

SSWBA Part 3

Local authorities must assess any carer where it appears they may have needs for support—regardless of perceived level of need or financial circumstances.

Assessments must be proportionate, focusing on **what matters** to the carer, and consider outcomes such as employment, education and wellbeing.

The **Part 3 Code of Practice** emphasises a consistent, strengths-based assessment process that applies to all people, including carers, and requires practitioners to use professional judgment.

Source - Social Care Wales - [Code of Professional Practice for Social Care Workers](#)

Codes of Professional Practice for Social Care Workers

Requires individuals to be qualified and competent, uphold safety, and maintain high standards of professional conduct.

For comparison

SSWBA	CoP
“appropriate skills, knowledge and competence”.	Emphasises that workers must be <i>properly qualified</i> , meet professional standards, and follow practice codes
The conflict	
The legislation promotes <i>skills, knowledge and competence</i> , while the Codes emphasise professional qualifications and consistently high standards—leaving ambiguity about <i>exactly who is competent</i> to undertake Carers Needs Assessments.	

Who needs to be trained?

- **Social Care Practitioners** carrying out Carers Assessments
- **Well-being/Community Support Officers** who perform “what matters” conversations
- **Third sector staff** where local authorities delegate assessments (with carer consent)
- **Level 4 assessment officers**
- **Supervising Level 4/5 practitioners or Social Workers**
[\[socialcare.wales\]](#)

What do we mean by competency?

Competency includes:

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Knowledge

- Understanding SSWBA duties for carers, including the duty to assess.
- Awareness of carer rights and equal status with the person cared for.
- Knowledge of eligibility framework and personal outcomes. [\[socialcare.wales\]](http://socialcare.wales)

Skills

- Ability to facilitate a “what matters” conversation.
- Ability to explore employment, education, wellbeing, and impact of caring.
- Ability to recognise when specialist assessments are required.

Professional Behaviours

- Ability to practice collaboratively and respectfully with carers.
- Ability to follow the Code of Professional Practice’s expectations (safety, respect, honesty).

What is the approach of some LAs in outsourcing to third sector assessors? Qualifications/competency?

Some LAs work with third-sector organisations for initial conversations, wellbeing checks, or preventative assessments. Also, some LAs commission third sector organisations to carry out full CNA both for Adults and Young Carers.

As the guidance is not clear in terms of qualifications and/or competency, some LA’s can only ensure their commissioning and quality assuring processes include what requirements are agreeable in line with legislation and guidance.

Quality assurance of the carers needs assessment if outsourced will ensure clear governance for standards.

Although, the **Challenge** is when outsourced, providers may have variable training standards, making consistency across Wales difficult.

Should only level 4 officers carry out an Assessment? Are there other options, such as sign off by level 4?

Being clear what is level 4, and what does that mean in practice is important. It’s not clear what the expectations of a Level 4 officer are.

The SSWBA requires assessments to be completed by someone with the **necessary skills, knowledge and competence**—*qualification level is not specified*.

Although research suggests the following on good practice

Level 3 practitioners:	<ul style="list-style-type: none">• Low-risk or preventative Carers Assessments• Straightforward “what matters” conversations
Level 4 practitioners:	<ul style="list-style-type: none">• More complex carer circumstances (e.g., high stress, safeguarding concerns, risk issues)
Level 5/Social Worker:	<ul style="list-style-type: none">• Complex risk, mental capacity considerations, safeguarding, intersecting care needs

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Sign off by level 4 option

Again, as can be seen, it isn't clear how can a practitioner pre-determine if a case is going to be low-risk or more complex? A conversation through what matters may start simple enough but may become more complex in nature. Therefore, the above table that includes Level 3 as an alternative is not a good fit when completing CNA but can be seen as a supportive preventative measure.

These first initial conversations can then lead to a referral to a L4 practitioner completing the full CNA.

Best practice

Ensure that there were clear programmes of study and guidance for those completing CNA to ensure they are suitably qualified with the right tools and competencies. Regardless of where they work LA or 3rd Sector, all must complete this.

Otherwise there could be a knock-on effect of the standard of those completing a CNA.

What type of training is best practice/ how often?

Mandatory Training

- **SSWBA (Part 3 & 4) duties** for carers [\[gov.wales\]](http://gov.wales)
- The **National Assessment & Eligibility Tool** (including carer-specific requirements) [\[socialcare.wales\]](http://socialcare.wales)
- Safeguarding (adult and child) – *annual*
- Mental Capacity Act – *biannually*

Specialist Training

- Strengths-based practice and person-centred communication
- “What matters” conversations [\[socialcare.wales\]](http://socialcare.wales)
- Carer-specific needs and outcomes
- Recognising carer stress, burnout, and wellbeing impacts
- Domestic abuse, hidden harm and coercive control

Supervision & CPD

- Reflective supervision monthly or bi-monthly
- Annual CPD in line with Code of Professional Practice expectations.

What recommendations could be made to the Welsh Government to provide clarity on training, qualification, competency and proportionality?

1. Produce a National Competency Framework for Carers Assessors

- Define minimum competencies for Levels 4 and outsourced staff
- Align with National Assessment & Eligibility Tool. [\[socialcare.wales\]](http://socialcare.wales)

2. Standardised national training curriculum

Should include:

- SSWBA carer duties
- “What matters” conversation techniques
- Eligibility determination
- Carer stress, wellbeing, and rights

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3. Clear guidance on delegation to third-sector organisations

- Minimum qualification requirements
- Required training modules
- Supervision and quality assurance standards

4. Mandatory CPD standards for non-registered staff

- Ensure consistency with registered practitioner expectations in the Code of Professional Practice.

Appendix J: Steps to a carer's needs assessment for Practitioners

