**How to... Introductions**

**Introduction**

The relationships and connections we make with people are a key part of social work. Without effective working relationships with service users, their families and other professionals, achieving the best outcomes can be fraught with difficulties and barriers. First impressions, initial contacts and introductions are therefore crucial to establishing rapport and building the foundations of effective relationships. It is important to remember that you may be working with many different client groups and how you introduce yourself and explain your role will vary depending on the circumstances and the service users involved.

**Initial contact**

In most circumstances initial contact will be made by telephone or letter, to introduce who you are and to arrange a face-to-face visit. It is important to take into account the needs of the service user when making initial contact. For example, when making contact by phone do they prefer to be contacted by landline or mobile? Are they hard of hearing? Is there a preferred time to contact them? You will not always know the answers to these questions so be prepared to briefly explain why you are calling and check whether now is a convenient time to talk.

You will need to check you are talking to the right person and then explain who you are, your job title, where you are calling from and the purpose of your call. You should also have the person's contact details to hand to confirm these and be prepared to provide your contact details. It is useful if you have a number of times/dates available for when you are free to visit. Your organisation will have in place data protection procedures and policies and you should ensure you are aware of these when you are making contact.

*Example*

You: ‘Hello, is this Mrs Jones/may I speak to Mrs Jones?’

Mrs Jones: ‘Yes, this is Mrs Jones, who is calling?’

You: ‘My name is Joe Bloggs, I am a [job title] from [organisation]. Is now a good time to have a quick chat with you?

Mrs Jones: ‘Yes’

You: ‘I have received a referral [from] regarding [matter] and I would like to arrange a time to visit you to discuss the referral. Are there any times that are not suitable for you?

Mrs Jones: ‘Yes, I go shopping on Wednesday mornings, see my family on Friday afternoons and have a hospital appointment next Monday morning’

You: ‘Ok, I have some time on Tuesday afternoon, would 2pm be ok?’

Mrs Jones: ‘Yes, that is fine’

You: ‘OK, can I check the address I have for you is correct? [Confirm address]. Would you like me to send you a letter to confirm the time and date?’

Mrs Jones: ‘Yes/No’

You: ‘My telephone number is [give number] in case you need to contact me before Tuesday or need to rearrange and I look forward to meeting you then’

Mrs Jones: ‘Thank you, goodbye’.

You: ‘Goodbye’

**The first visit**

The initial visit can be quite daunting, especially as a student or newly qualified social worker. There are a number of things you can do to make sure you feel prepared and understand what your role and remit is, as well as that of other professional who may be in attendance. Always remember that, even though you may not feel like it, you are in a position of power and meeting a new social worker for the first time can be just as daunting (if not more so!) for the person you are visiting. Even if the person you are visiting has had previous social work involvement, you need to be clear about who you are, your role and the purpose of your visits and intervention.

It is important to read any referrals thoroughly so you are aware of what the presenting issues are and understand why social work involvement is required/has been requested. There may be records from previous social work/service involvement that you can access to gain a better understanding of what is happening and the background to the case. Be cautious when reading files and try not to form a judgement of the person before you meet them, the writer may have had a very good or very poor relationship with this person and this can affect the way they viewed them and their interactions with them. If a person feels pre-judged by you this may make it harder to establish rapport and build an effective working relationship with them.

You may also wish to draft a brief plan to help you structure your visit, this can help you feel less anxious about forgetting something, provide you with prompts if you get lost and help you keep the visit focused if the service user struggles to remain focused. Making notes about the case such as family members, presenting issues, previous social work/service involvement, any other professional involvement and any other factors you feel may be relevant may help. This way you can double check the information you are receiving and ask informed questions if something is not clear or does not make sense.

Don’t worry that you might not be able to answer any questions you are asked – no-one expects you to know everything, but be ready and have a response prepared such as ‘I’m afraid I don’t know [answer], however I will speak with [manager/colleague/relevant organisation] and try to find that out for you’. Don’t be tempted to try and answer something you don’t know as you may end up causing more confusion or creating expectations that cannot be met.

*Example plan*

* Introductions – self (name, title, contact details) service user, others present.
* Why you are here – referral received and purpose of the visit.
* Service user’s understanding of referral and purpose.
* Relevant legal context and terminology e.g. Child in need - Children Act, concerns re child, voluntary basis/Mental Capacity – Mental Capacity Act, level of understanding, best interest decisions.
* Working openly and honestly and the need for cooperation to achieve best outcomes; confidentiality and when disclosure may be necessary.
* Background from service user – how we reached this point.
* Recap what you have learned and reiterate your role and purpose, what you need the service user to do, what you can offer or advocate for in terms of services and supports.
* Any questions?
* Book in next visit.

Be prepared to deviate from your plan but try to ensure you cover the main points.

*Initial visit checklist*

* Create a brief plan to help you structure the visit.
* Make sure you know the name of the person you are visiting, other household members and the contact details.
* Read the case file before you visit to gain an understanding of the issues involved and the people you are likely to be meeting. Be careful not to be influenced by opinions/personal observations in case notes from other professionals but do be aware of any potential issues such as previous aggressive behaviour and discuss any such issue with your supervisor before visiting.
* Make sure you understand what your role is, how you will carry this out, what your aims are and that you can explain this in a way that makes sense to someone with no social work knowledge.
* Do not assume that if someone has had previous social work involvement they will understand why you are there, what your role is or what jargon and acronyms mean.
* Be prepared to answer questions that might not seem relevant to you – if the service user has felt the need to ask then it is clearly important to them.
* Be prepared to not know the answers but be ready and have a response prepared.

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