



Annex 1: Methodology

A1. Research design

Researchers engaged with experts in the field to refine questions and research design, alongside a thorough literature review. We are grateful to the Social Care Workforce Research Unit, Citizens Advice and Think Ahead for their initial feedback on research design.

A2. Survey of mental health practitioners

Money and Mental Health collected data through an online survey of secondary mental health professionals, carried out between 21st March and 11th May 2017. This was distributed to around 400 mental health professionals who had joined Money and Mental Health's Professional Network. It was also shared through our newsletters and on social media. The survey was also kindly distributed by relevant professional bodies via social media, including:

British Association of Counsellors and Psychotherapists
British Association of Social Workers
British Medical Association
British Psychological Society
Royal College of Nursing
Social Care Workforce Research Unit
Think Ahead
Unison
Unite the Union

The survey asked details about the person's working context, their estimation of prevalence of problem debt and mental health problems, whether they had had training on the subject, and what would be their most likely reaction to a case involving financial difficulty.

216 mental health practitioners responded, including respondents from a range of professions.

The survey was targeted at those working in secondary mental health services, to try and get an idea of how those with more severe needs are supported. Of these:

- 42% of respondents worked in community mental health teams,
- 16% in inpatient services,
- 15% in other secondary services,
- 5% in a setting where mental health is assessed but ongoing support is not provided, eg AMHP desk, place of safety, psychiatric liaison, custody suite.



The survey also included a question asking whether participants would be willing to take part in a depth interview on this topic, and was used to recruit interview participants.

A3. Interviews with mental health practitioners

The bulk of this report is based on understanding gathered from 22 interviews with mental health practitioners currently practising in secondary mental health services at the time of interview, between 24th April and 23rd May 2017. Efforts were made to include an even balance of professional background, geographical location, and type of service where the professional worked. Where this was not possible due to response rates to the survey, a snowballing technique was used to recruit, using contacts from those who had indicated an interest to recruit others. In practice, the sample included a range of professionals from different geographical areas and of different genders. Further details on sampling are available from Money and Mental Health on request.

A semi-structured interview topic guide was used, starting with a case study and asking practitioners how they would respond. It went on to ask about how practitioners would identify whether a service user was experiencing financial difficulties, what they would do to help, how they saw finances as impacting on mental health and vice versa. It then explored confidence and attitudes towards tackling financial difficulty as part of their job, practical barriers practitioners encounter and ideas for solutions.

Interview transcripts were thematically coded and analysed to answer the research questions of:

- How much do secondary mental health practitioners know about the role of finances in mental health problems?
- How well prepared are they to deal with the financial difficulties experienced by patients with mental health problems?
- What more they need to be confident in supporting people with this issue?

Emerging themes were used to formulate an understanding that was checked with other members of the research team and external experts, and cross-checked with data from both surveys and the literature. Recommendations were reached through analysing the implications of the research (eg where problems were identified, what solutions had been suggested) in conjunction with team expertise on surrounding subjects, including where there is precedent and opportunity for change, and where changes could be expected to make the most difference to outcomes.



A4. Research Community Survey

Additional data is presented from a survey of members of Money and Mental Health's Research Community to provide further context. This group of around 3,000 volunteers with experience

of mental health problems is at the heart of Money and Mental Health's work, and ensure our policy recommendations are always informed by the voice of lived experience.

The total sample size for this survey was 420 adults, all with experiences of mental health problems and financial difficulties. Of these, 325 had financial difficulties during the time they were accessing specialist mental health services. It was not possible to specify that such services were secondary. Data was collected through an online survey between 8th June and 12th July 2017. Where statistics from this survey are quoted in this report, we also provide sample size and a description of the base. This survey also contained some qualitative questions which were analysed thematically and used to illustrate the report.