

# Sensemaking strategies of social workers: Insights from ethnographic studies of child and family and adult social work services in England and Scotland

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## Abstract

Social workers across different contexts are tasked with making judgements in complex and uncertain conditions. There has been comparatively little research exploring how social workers make sense of information to inform their decision-making across contrasting spheres of social work practice. This article draws on data from two ethnographic studies; one study examined different forms of supervisory support in child and family social work teams in England, while the other study explored personalization in adult social care in Scotland. Drawing on interview data ( $n=32$ ) and over 350 hours of observations, this article presents findings from a reanalysis of the two studies using the notion of sensemaking as a conceptual lens. There are significant similarities in aspects of social workers' sensemaking across national and practice contexts; these are case categorization, triangulation of information, collegial challenge, and threshold decision-making and professional discretion. Practitioners move between intuitive and analytical modes of reasoning as they make sense of information, with colleagues

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offering opportunities for slower, more deliberate sensemaking. Organizations and teams should actively create and seek spaces and interactions that promote better sensemaking and encourage the creation of more robust narratives with and about the individuals and families that social workers support.

*Keywords:* discretion; ethnography; judgement; narrative; sensemaking.

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## Introduction

Social workers are tasked with making challenging decisions in highly complex environments (Taylor 2017). This is true of social workers across different practice contexts; the Child Safeguarding Practice Review Panel's (CSPRP) national report on child protection practice in England highlighted deficiencies in the quality of social workers' decision-making, including a lack of professional curiosity (CSPRP 2022). Meanwhile, an analysis of safeguarding adult reviews in England over a four-year period found shortcomings in assessment of risk, recognition of abuse, and professional curiosity (Local Government Association 2024).

There has been a burgeoning body of research internationally exploring how practitioners use professional judgement in their day-to-day practice (Lauritzen et al. 2018). Professional judgement is complex, combining intuitive and analytical cognitive processes (Helm 2022), moral reasoning (Taylor and White 2001), and team and organizational influences (Helm and Roesch-Marsh 2017). Intuitive judgements may also be influenced by emotional and relational factors, such as perceptions of an individual's openness (Cook 2017).

In the field of child and family social work, there has been increasing use of theories and models from the psychology of decision-making to better understand how social workers reach professional judgements (Whittaker 2018; Helm 2022). In adult social care, there has been interest in how practitioners use discretion to navigate organizational rules in their decision-making (Evans 2013), how interpersonal and ethical considerations influence safeguarding decisions (Braye et al. 2017), and the hidden influence of collegial case discussion in assessment decision-making (Morrow 2024).

Examining professional decision-making necessitates exploring how social workers process information in their day-to-day practice. The sense-making process that underpins professional judgement and decision-making has begun to receive more attention in the social work literature

(Avby 2015; Helm 2017; Cook and Gregory 2020; Helm 2022; Gregory 2023).

## Sensemaking and story-building

Sensemaking activity precedes the forming of a judgement (Platt and Turney 2014); a crucial aspect of sensemaking is its function in organizing experience. Weick (1995) argues that individuals and groups make sense of organizational life by constructing narratives that retrospectively explain their experiences and which are enacted through future action. Weick et al. (2005) identify three key sensemaking activities. Individuals recognize pertinent cues that require explanation (*enactment*); they gather, process, and order information to develop their narrative (*selection*); finally, the developed narrative is adopted as being explanatory and capable of informing future action (*retention*) (Weick et al. 2005).

To illustrate, a social worker receives a referral raising concerns about (self-)neglect. At first, they focus on cues within the referral that indicate that there may be (self-)neglect, such as the physical appearance and well-being of the individual or family. The social worker then gathers information to help them to understand the significance of these cues; this may include putting together a chronology, visiting the individual or family, or speaking to other professionals and family members. Decision-makers intuitively make sense of the gathered information using a repertoire of mental frames (Klein et al. 2007); for example, rapidly comparing their observations from a visit to their mental frame of 'good enough' home conditions. This information contributes to a professional narrative about what is going on, which informs subsequent decision-making.

Congruence and coherence play an important role in sensemaking. As individuals piece together their narrative, new information is made sense of in relation to how it fits with the developing narrative; the aim is to provide coherent, plausible accounts rather than to find 'the truth' (Weick et al. 2005). The more information that can be gathered and incorporated, the 'better' the narrative becomes (Weick et al. 2005).

Hall (2019) argues for adopting a narrative approach to understand how social workers make sense of and account for their work. Adopting a story-telling approach can help practitioners to avoid a rush to certainty, promoting reflexivity and ongoing engagement with individuals and families to better understand their story (Roets et al. 2017). Since narratives often convey moral tales (Hall 2019), such an approach helps to account for the use of moral reasoning in social work, where judgements about character play a role in decision-making (Taylor and White 2001).

## Sensemaking and peer discussion

Sensemaking is an inherently social process (Weick et al. 2005). Helm's (2022) model of peer-aided judgement emphasizes the role that colleagues play in supporting social workers to make sense of experience. Drawing on the work of Hammond (1996), Helm (2022) argues that collegial case discussions enable social workers to move from the rapid, intuitive thinking they employ in complex, information-dense environments such as home visits to slower, more analytical reasoning in the structured environment of the office-space.

The use of intuition helps social workers to focus on salient cues and avoid information overload when faced with complex situations (Taylor 2017; Whittaker 2018), while opportunities for case discussion enable practitioners to reflect on, work up, or amend the judgements they make intuitively (Whittaker 2018; Helm 2022). This process also relates to sensemaking as story-building; cues may be identified by colleagues looking at a new referral together (Gregory 2023); discussions with peers support social workers to process the information they gather (Avby 2015); and finally, colleagues support social workers to develop robust hypotheses that inform their decision-making (Whittaker 2018).

Helm (2022) notes that there has been limited empirical exploration of the role of collegial case discussion in social work sensemaking. The authors first met at a conference when they were in the process of collecting and analysing their ethnographic data. At a more recent conference, they discussed their findings and reflected on the lack of research on sensemaking across different practice contexts. This article uses data from the authors' ethnographic research across contrasting national and practice settings to address these gaps.

## The practice contexts

In England, child and family social work has been dominated by managerialist and technical-rational approaches to practice (Featherstone et al. 2014). This has been driven by responses to high profile child deaths, a neo-liberal political landscape, and decreased public spending meaning higher demand for services with less available resource (Parton 2014). Managerialist approaches limit scope for exercising professional judgement and reduce time spent with children and families, creating conditions in which errors are more rather than less likely (Munro 2010). More recently, the Independent Review of Children's Social Care in England has sought to refocus child and family social work on prevention and family maintenance (MacAlister 2022). Intervening earlier and keeping families together necessitates reducing bureaucracy and increasing the time that social workers spend with families (MacAlister 2022); however, time spent with

children and families makes up a minority (28 percent) of a social worker's working week (Johnson et al. 2023).

In Scotland, adult social care has been shaped by a policy context that emphasizes personalization, human rights, and partnership working. Since the introduction of the Social Care (Self-directed Support) (Scotland) Act 2013, there has been a focus on enabling people to have greater choice and control over the support they receive. This has occurred alongside efforts to integrate health and social care services through the Public Bodies (Joint Working) (Scotland) Act 2014, which established Integration Authorities responsible for planning and delivering adult health and social care services. Although these reforms are underpinned by a commitment to person-centred, outcomes-focused practice, the implementation has faced significant challenges, including variability in practice across local authorities, workforce pressures, and tensions between aspirational policy goals and the realities of constrained budgets and rising demand (Biziewska and Palattiyil 2023). Recent developments, such as the proposed creation of a National Care Service, aim to address some of these systemic issues and strengthen accountability and consistency in adult social care delivery (Feeley 2021). Nonetheless, the sector continues to grapple with workforce shortages, increasing complexity of need, and debates over the balance between local flexibility and national oversight (Feeley 2021).

Though governed by different legislation and regulatory frameworks, there are similarities between the English and Scottish context. In child and family social work, Scotland faces similar challenges of high workloads as a result of increased demand not being matched by funding for services (SASW 2025), while the creep of managerialism has led to 'eroding the social work relationship in favour of bureaucratic, procedural systems' (Smith et al. 2012: 1474). Personalization has been a cornerstone of practice in adult social care in England for some time, with the Care Act 2014 cementing person-centred approaches to service delivery. However, in common with Scotland, there are concerns about how well personalized care can be delivered when resources are increasingly scarce (Lymbery 2014). The themes of high workloads, workforce retention, and limited resources are common across the practice and national contexts discussed here. Supports available to social workers—such as monthly supervision and group case discussions—are also common across the different contexts.

At the same time, important differences remain. Risk-oriented governance and public scrutiny play a particularly salient role in shaping sensemaking in English child and family social work (Munro 2010), whereas adult social workers in Scotland more often navigate tensions between rights-based policy ambitions and the practical limits of service availability (Biziewska and Palattiyil 2023). Previous research has also shown that national practice contexts can influence the types of decisions that social

workers make (Benbenishty et al. 2015) though less is known about whether practice contexts shape *how* those decisions are reached. Risk-averse practice contexts can encourage social workers to be more risk-focused (Benbenishty et al. 2015; Leigh 2016), so an understanding of practice context is useful for considering nuances in social workers' sensemaking.

## Methods

This article draws on findings from two separate research studies. Gregory undertook an ethnography across two local authority sites in England exploring the relationship between supervision and sensemaking. Two co-located teams in each site took part in the study, meaning four teams participated in total. All the teams undertook first assessments of children and families following referral, with two teams also undertaking short-term interventions of up to six months, and the other two teams completing long-term interventions, including child in need, child protection, and court work. Approximately forty team members participated in observations, while twenty-two key participants (seventeen social workers and five practice supervisors) also took part in semi-structured interviews and had supervision sessions recorded. Case discussions in the team primarily involved triage of cases, unpicking home visits or information from other professionals, and pulling together information to inform assessment decision-making.

Data collection took place between September 2018 and March 2019, and reflexive thematic analysis (Braun and Clarke 2021) and narrative analysis (Riessman 2008) were used to interpret the data. This involved a combination of coding and iterative theme development across the data, and exploring the structure and progression of narratives in relation to particular cases. Having three types of data supported triangulation in the analysis through repeated comparison of emerging themes and patterns across the datasets. This kind of triangulation is good practice in ethnographic research (Fetterman 2010; Hammersley and Atkinson 2019).

Morrow undertook an ethnography in a Scottish local authority team which supported adults requiring social care in the community between December 2019 and January 2021. The focus of the study was exploring social workers' experiences of implementing Scotland's personalization approach to adult social care. The team comprised twenty-four social workers, five team leaders, and a service manager. The social work team undertook core statutory functions, including assessment, care coordination, and safeguarding triage. Discussions centred on decision-making related to complex assessments, care planning and review, budgetary considerations, and the management of safeguarding concerns. Over this period daily practice was observed, and informal and formal interviews

**Table 1.** Data gathered from the two studies.

Study	Observations	Interviews	Other data
Child and family	23 (approx. 92 hours)	22	17 audio recordings of supervision
Adult social care	Approx 280 hours	10	6 months of auto ethnographic reflective log

were conducted with the team. Additionally, during this year of data collection, the researcher was employed full-time for six months as a social worker and collected auto-ethnographic data.

Fieldnotes, a reflective log, and interview transcript datasets were analysed using NVivo software. Initial descriptive codes and themes were generated for each dataset. A full cross thematic analysis of all datasets enabled the progressive accumulation of inductive codes in an iterative cycle which consisted of multiple rounds of coding to refine the analysis (Braun and Clarke 2021). For further methodological detail please see Morrow and Kettle (2024).

Table 1 outlines the type and quantity of data gathered in each of the two studies.

Data from the two ethnographies were deductively reanalysed through a theoretical lens of sensemaking, particularly utilizing Weick's (1995) notion of story-building and Helm's (2022) model of peer-aided judgement. Reanalysing the data provided an opportunity to extend and move beyond the original aims of each study and to interrogate the data in new ways. As Wästerfors et al. (2014: 467) argue, the reanalysis of qualitative data 'should be at the core of qualitative research' because it enables researchers to build on earlier findings, combine data sources, and generate new insights.

Each dataset had previously been inductively coded independently by the two authors. These codes were then compared across both datasets, deductively re-interpreting the two sets of data. This led to the development of themes, which were iteratively refined through comparison and discussion between the two authors. Similar methods have been used in social work research across different national contexts in order to provide richer and deeper understandings of a particular shared phenomenon (see Critchley and Keddell 2024). This approach enabled the development of four themes related to sensemaking: case categorization, triangulation of information, collegial challenge, and professional discretion and interpreting thresholds.

### Ethical considerations and researcher positionality

Ethical approval was obtained for each study by the authors' university ethics committees, and consent was treated as an ongoing process, particularly given the observational nature of the research and the sensitivity of

case-related discussions. Opportunities to opt out were offered formally through clear processes to withdraw consent, and informally through creating distance between participants and the researcher when the discussion was intended to be confidential. All data were anonymized, with identifying details removed at the point of transcription.

Gregory practised as a child and family social worker and team manager for close to a decade. Cassell (1988) notes that ethnographic researchers require both physical and social access to participants, and common membership of the profession helped with establishing social access. A key consideration for ethnographic researchers is the extent of their participation in the observed group. Gold (1958) identifies four levels of participation, ranging from complete participant (seeking to become a full member of the group) to complete observer (seeking to maintain distance from the group). Gregory positioned themselves as an observer as participant (Gold 1958), interacting with participants for the purposes of the research and in general conversation but without engaging in participants' day-to-day work discussions.

Morrow, also a registered social worker, occupied a dual insider–outsider role during a period of employment within the team, which provided social access to participants (Cassell 1988) and proximity to everyday practice while also requiring careful management of role boundaries and analytic distance. This entailed moving between the role of complete participant and participant as observer (Gold 1958), holding in tension practising as a member of the team and observing its activities as a researcher. Reflexive journals supported continuous reflection on the authors' relationship with and impact on the research sites. Reflexive journals can also provide useful analytic insights (please see Gregory and Biggart 2024 for examples of using reflexive journals within findings).

## Findings

### Case categorization

Social workers often operate under time pressure within complex, uncertain environments where information is frequently incomplete or ambiguous. In such settings, the need to make decisions means that practitioners must engage in rapid sensemaking. One common strategy involves the categorization of cases:

You can just see it is one of those cases. Like when you read the referral and think, yep, chaotic lifestyle again. You can spot it a mile off.  
(Fieldnotes, adult study)

Drawing on familiar patterns and labels formed through prior experience, social workers use intuitive judgement to categorize cases. Such

shortcuts function as heuristic tools, enabling practitioners to make fast assessments without the need for deeper and more time-consuming analysis.

The data suggest cases are quickly labelled with terms such as ‘chaotic lifestyle’, ‘domestic violence’, ‘neglect’, ‘financial abuse’, or ‘self-neglect’. These terms serve as shorthand for clusters of behaviours and risk factors. Often, case categorization involved a rapid appraisal of referral information, at other times, judgements were made in response to situational cues during initial visits:

I went around to do a joint [visit] with the early help, I mean, that was chronic neglect. The flat was really unkempt, these two boys were running riot. (Interview, C&F study)

What appears to be taking place in these moments is a form of pattern-matching (Klein et al. 2007), in which practitioners compare the brief, fragmented data they encounter with internalized mental frames. These frames, which develop over time through accumulated experience, allow social workers to make rapid judgements about a situation and what action is required.

At times, this took place collectively within the team, reinforcing the use of such shortcutting strategies through repetition:

Sam: Right, T. S is all over the shop isn't she?

Casey: Mmm hmm. She's homeless, she's, erm, she's missed two, the last two supervised contact sessions. She's homeless and nor did she turn up for ...

Sam: (Typing) S's lifestyle is chaotic. (Supervision, C&F)

These categorizations reflect deeply embedded professional perceptions that help to organize information and guide future steps. This preliminary classification shapes the practitioner's interpretive lens and primes their expectations about what might unfold next. It sets in motion a trajectory for how the case will be approached, including the urgency with which it is treated, the resources mobilized, and the nature of any immediate intervention deemed appropriate. This can accelerate decision-making by providing a shortcut to guide next steps, which could include a decision not to proceed further:

This case is a standard self-neglect one—he's refusing support from every professional, living in absolute squalor, doesn't look well, and thinks everything's fine. You get cases like this. It's hard to know what more we can do. (Fieldnotes, adult study)

At other times, categorizing cases provided a focus for subsequent information-gathering, sensitizing social workers to look out for particular issues or patterns. In one example, the categorization prompted the social worker to approach new information with a degree of scepticism:

Most of the concerns are around disguised compliance ... I've had to investigate whether she's telling me the truth. (Interview, C&F study)

With case categorization, the data suggest conversations are focused on 'what' happened, rather than 'how' and 'why' questions which would promote deeper analysis of events and behaviour. While these shortcuts enhance the speed at which work can be done, they also have implications for how information is gathered and understood. Subsequent observations may be filtered through the initial frame, which runs the risk of oversimplification, or new evidence being interpreted in ways that support the original categorization. Given how influential early judgements can be in the life of a case (Munro 1995), opportunities for deep analysis are crucial to ensure that social workers do not become closed off to alternative explanations.

### Triangulation of information

A central part of social workers' sensemaking is the evaluation of information gathered to assess its significance within the broader context of the case. Building on their initial case categorization, practitioners critically examine information to determine whether it contributes meaningfully to the developing case narrative. This evaluative process is not static; even when social workers appear confident in their initial interpretation, they typically seek out further information to test their early judgements:

We did finally get all the information from the previous county, which takes it back to when the oldest child was first born, exactly the same concerns, you know, repeating concerns. (Interview, C&F study)

A fuller picture of the case is constructed through a process of comparison and cross-checking, in which multiple sources of information are reviewed for consistency or contradiction. Rather than relying on a single account, practitioners in both studies systematically drew on chronologies and case records to trace patterns over time and to assess the coherence and congruence of the narratives that emerged:

The chronology, case notes, and old referrals into duty tell a story. Looking back, like when you think about how many times this has already landed on the duty desk, it's hard to ignore. It tells you this isn't a one-off—there's something more going on. (Fieldnotes, adult study)

Piecing together information in this way offers social workers an opportunity to slow down their thinking and to consciously and deliberately consider the information at hand. In this way, it can act as a check and balance to prevent early case categorizations becoming determinative of decision-making. The accumulation and processing of information can also add evidential weight to the social worker's developing judgement:

[P]ulling together this health chronology really indicated the way that we would need to be looking at removing this baby as soon as she was born. (Interview, C&F study)

Social workers also draw upon a range of information from other family members and professionals to triangulate data and strengthen the reliability of their interpretations. This process of triangulation allows practitioners to compare different accounts and perspectives:

It's hard to know what to believe. She's telling me everything's fine, but it doesn't quite sit right with me. The OT flagged concerns about her mobility, and her daughter thinks she has fallen a few times and not told anyone. I think I'll need to keep an eye on this one. (Fieldnotes, adult study)

Incongruence is a key driver of deliberate sensemaking activity (Weick 1995; Klein et al. 2007), so conflicting or contradictory accounts are likely to prompt social workers to engage in slower thinking and to continue to gather information to inform their developing narrative:

The son says he's just helping with the bills, but she doesn't know what's going in or out of her account. I'm starting to wonder if it's support or control. I'll get in touch with the carers and see what they have to say. (Fieldnotes, adult study)

By contrast, when multiple sources offer similar accounts, social workers feel more confident that information is likely to be accurate. This is particularly the case where individuals at risk or in need of support provide information that is corroborated by a third party, such as another professional or family member:

Ashley: How do we know he said that? Is that coming from grandad or?

Lesley: And the children.

Ashley: Goodness me. (Supervision C&F study)

While perceptions of congruence and coherence between new information and developing narratives help to reinforce social workers' judgments, when discrepancies arise or when the information gathered lacks coherence, this often prompts further scrutiny or ongoing monitoring. Rather than accepting information at face value, social workers question, probe, and seek clarification when elements of a case appear contradictory or ambiguous.

### Collegial challenge

Within informal conversations, team discussions, and supervision, social workers engaged in respectful questioning and constructive critique when

discussing cases. This process encourages practitioners to consider different angles and explore alternative explanations:

Jackie has returned to her desk having moved round to speak to Jan. Jan says across the desk, if it was the other way round, would we open it? Jackie says, that's an interesting dilemma. (C&F Fieldnotes)

These questions are not merely rhetorical; they serve to promote deeper sensemaking and avoid overreliance on initial categorization. Future-directed questions provide one means of prompting social workers to think more deeply about the consequences of intervening or not:

Steph asks "If we were to walk away what would happen?" (C&F Fieldnotes)

Considering what would happen if no action is taken can help social workers to think more deliberately about the circumstances of the individual or family, prompting them to consider alternative explanations for their behaviour:

Is it non-engagement.... or is something else going on? I reckon it will bounce back into duty again next week, if you close it. (Fieldnotes, adult study)

Such conversations give social workers pause for thought and enable them to slow down their thinking. Helm (2022) notes that the structured environment of the office provides a valuable space for enabling this kind of peer-aided sensemaking activity. Collaborative sensemaking thrives in environments that encourage safe challenge; there was evidence in both studies that colleagues felt able to ask questions that posed a direct challenge to the social worker's thinking:

Do you think you are overestimating her ability to cope? (Fieldnotes, adult study)

The presence of this type of questioning reveals the collaborative nature of social work sensemaking. It highlights that the social work team is not a collection of individual decision-makers, but interactive groups where shared understanding is co-constructed. Within a collegial environment, challenging each other fosters a culture of professional curiosity, rather than indicating of lack of knowledge or competence. Colleagues' questions disrupt habitual thinking and encourage a slower, deeper cognitive process. Roesch-Marsh (2018: 412) characterizes this type of team discussion as a process of 'thinking it through', which helps social workers piece together different strands of evidence and make sense of information.

Practitioners valued and sought out discussions with colleagues that deliberately challenged them and encouraged them to think more deeply:

I always like talking things through with Amira. She plays devil's advocate and it really gets me to think about the case. She is so

experienced, so it helps me step back and see what I might be missing. (Fieldnotes, adult study)

The benefits of seeking out a ‘devil’s advocate’ perspective were evident across both studies:

He always plays devil’s advocate, and that’s really good because he does get me thinking. He will sit there and give a scenario, or something, ask for my views on that, and maybe look at different options that are available to me. (Interview, C&F study)

Collegial challenge encourages reflection and thus is a mechanism through which sensemaking is deepened and narratives properly tested. In both settings, colleagues played a valued role in unpicking cases. This can reduce the risk confirmation bias and promote practice that resists simplified narratives or procedural ‘tick-box’ approaches, encouraging practitioners to focus on the unique circumstances of the individual or family. Through these interactions, professional judgement is not only exercised but refined, as practitioners remain open to ambiguity, multiple perspectives, and the evolving nature of casework.

### Professional discretion and interpreting thresholds

Thresholds serve to guide social workers’ decision-making; the information they gather needs to be considered in relation to whether a service should be provided, or protective interventions initiated. Though these thresholds are usually codified in legislation and policy, how they are interpreted is far from black and white:

Courtney and Steph are talking about inconsistencies in decisions made on cases. Steph says that cases where the concerns seem to be the same often end up with different outcomes. Steph says he wonders why and whether personality comes into it. Courtney says about a family “They are workable” and will engage. (Fieldnotes, C&F study)

Where participants perceived that a family would engage, a lower level of intervention was seen as justifiable:

Chris says, it could be child in need? Toni says, it could be, I think mum would engage actually. Chris says, I know the child protection threshold is what it is, it’s significant harm or it isn’t, but if mum would engage perhaps we could help break it down, help her understand the worries. (Fieldnotes, C&F study)

On the one hand, if a family is willing to accept support, then it is reasonable to think that the prospect of a better outcome is increased. However, evidence for the relationship between parental engagement and improved outcomes for children is lacking (Platt 2012), and so threshold decisions based on a perception of likely engagement may not be sound.

Perceptions of engagement are also important for adult social workers; if an individual is unwilling to accept support, this can engender a sense of hopelessness and a reluctance to allocate scarce resources to them:

He won't let the carers in and refuses them. There is so only so much we can do. What's the point of putting in a package, if he keeps cancelling it. Whereas, if someone is engaging and seems to need and want the support, I'd really push for a big package. (Interview, adult study)

Where an individual or family is not willing to engage, this may lead to a perception that they do not deserve a service or, in some circumstances, may warrant a more intrusive level of intervention. Here the difference in practice context is relevant: child and family social workers are more likely to interpret non-engagement as a cue to intervene, whereas non-engagement in adult social care may more often be interpreted as a cue to not offer services.

A complicating factor is the risk of dishonesty from individuals or families, which may lead social workers to incorrectly assess their willingness to engage or the level of need or risk present in their lives. One supervisor in the child and family study commented that 'We, as social workers, get groomed all the time by parents', and concerns about potential manipulation were similarly evident in the adult study:

Watch they aren't just taking you for a ride. They may be out to try and get everything they can ... More than they need. (Fieldnotes, adult study)

Social workers use moral reasoning to inform their judgements, and this inherently takes account of people's perceived character (Taylor and White 2001). Whether an individual is seen to be acting in good or bad faith could be a determinant of whether they are deemed to meet a particular threshold of risk or be eligible for a service. Perceptions of intent therefore play a role in threshold decision-making. In the child and family study, the issue of the intentionality of harm was an important factor in decision-making:

[A] lot of the families that we work with the neglect is, sort of, unintentional, but a lot of the things that the dad was disclosing that day were actually really mean and that was intentional harm ... the decision on that case was made really quite quickly that he should come into foster care that day. (Interview, C&F study)

Previous research has shown that social workers consider the extent of parental responsibility for harm when making threshold decisions (Platt 2006). Where harm has been deliberately caused, or needs have been deliberately misrepresented, this can tip the balance in how threshold decisions are made.

Threshold decision-making is complex. The dispassionate language of legislation runs in contrast to the situated, contextual, and relational ways in which social workers make sense of thresholds in particular cases.

In interpreting whether an individual or family meets a threshold for support or intervention, social workers take account of inherently moral considerations, such as the deservingness of an individual, and whether harmful behaviour is directly attributable to their action or inaction. This does not mean that their judgements are not informed by the evidence they have gathered, but where decisions are finely balanced or scarce resources need to be allocated, which side of the threshold an individual or family is deemed to sit may be influenced by the moral and relational instincts of the social worker rather than purely by ‘the facts’ (Taylor and White 2001).

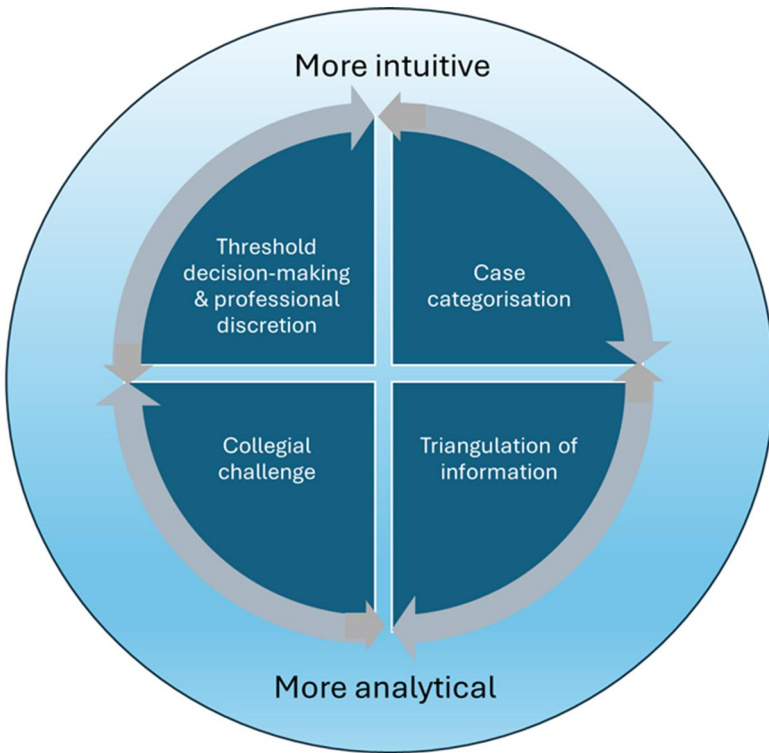
## Discussion

The findings show a range of similarities in how social workers engage in sensemaking across different national and practice contexts. Where there are differences as a result of practice contexts—for example, in how engagement and non-engagement are perceived—the underlying sensemaking process remains similar.

Although sensemaking can be seen as a staged process, it is also ongoing (Weick 1995; Weick et al. 2005), and movement between different sensemaking activities is common. Fig. 1 shows the interaction of the different aspects of sensemaking highlighted by the two studies and shows the movement between intuitive and analytic forms of reasoning as social workers engage in different sensemaking activities.

The findings in relation to case categorization add to our understanding of how professionals rapidly make sense of information to inform initial judgements. This process has parallels with Weick et al.’s (2005) notion of *enactment*. Past sensemaking feeds into case categorizations; decisions made previously act as cues to support case categorization both in terms of the specific case history and through contributing to the social worker’s repertoire of mental frames (Klein et al. 2007). Meanwhile, where the main function of a team is to rapidly triage and make decisions about new referrals, case categorization may feed directly into threshold decision-making without opportunities for slower, more analytical thinking (Kirkman and Melrose 2014).

Previous research highlights that experienced social workers are skilled in recognizing pertinent cues and use these to begin formulating an initial judgement (Whittaker 2018). However, it should be noted that experience within teams can be a source of ingrained bias where individuals or families are well-known to the team (Riemann 2005). These findings highlight that the identification of cues is an active process in which individuals or groups draw on mental frames to organize information and guide them on how to proceed (Klein et al. 2007). Though the types of cases social



**Figure 1.** Process diagram of different sensemaking activities.

workers encountered were different, this process of categorizing and having a template for how to respond was evident across both studies.

As practitioners gather information, they begin to incorporate this into their developing narrative; this is akin to the process of *selection* (Weick et al. 2005). At this stage, practitioners check for coherence between new information and the developing narrative (Gregory 2023). This was observed in both contexts through the triangulation of information—through using chronologies or comparing different accounts for congruence—which supports practitioners to slow down think more analytically (Hammond 1996).

Helm’s (2022) notion of peer-aided judgement is helpful for understanding how colleagues support this form of sensemaking through offering opportunities for reflection and providing safe challenge. Other research has similarly highlighted the ways in which colleagues contribute to the formulation of professional judgements (Helm 2017; Whittaker 2018; Gregory and Biggart 2024; Morrow 2024) but what is striking is the similarity in how this operates across different practice contexts. The case

categorization observed in both studies can run the risk of leading to formulaic responses or holding on to 'sticky' first impressions (Munro 1995) despite contrary evidence. By providing safe challenge, colleagues can help to mitigate over-reliance on professional shortcuts and support practitioners to revisit and revise their initial categorization or developing narrative, thus avoiding confirmation bias.

Collegiality can, however, in some circumstances limit rather than support curiosity, through fostering a shared scepticism of alternative viewpoints (Gregory and Biggart 2024) or through colleagues reinforcing rather than challenging thinking (Riemann 2005; Helm 2017). Some individuals may also feel unsafe to participate in collegial challenge, with power dynamics in teams and the individual biographies of social workers contributing to how willing they are to engage in sensemaking dialogue (Gregory and Biggart 2024). One upshot of this is that certain voices may not be heard or may be too readily dismissed when teams engage in case discussion (Taylor and White 2001; Gregory and Biggart 2024).

The role of professional discretion in threshold decision-making becomes pertinent as practitioners move towards forming a judgement. Weick et al. (2005) call this part of the sensemaking process *retention*. At this stage, social workers develop plausible narratives that are explanatory and support decision-making. Previous research has noted that practitioners' accounts need to be 'sold' to the organization and other stakeholders (Saltiel 2017; Gregory 2024), so it is important that narratives are robust and persuasive. Saltiel (2017) and Gregory (2024) found that supervisors and colleagues play a role in 'working up' accounts to support recommendations, demonstrating that peer discussion plays a role across all aspects of sensemaking activity.

Threshold decision-making is complex, and practitioners may choose which aspects of their narrative they wish to spotlight to inform their decision. The use of professional discretion is a key part of the process and is informed by the value-base of the practitioner (Evans 2013) and by their perceptions of deservingness, engagement, culpability, and other moral considerations (Taylor and White 2001). There is a risk, however, that positive or negative perceptions of an individual or family can skew, rather than helpfully inform, decision-making (Taylor and White 2001; Cook 2017). Peer discussion can act as an important check and balance here, however in the data, there was limited evidence of collegial discussion taking place to explicitly explore practitioners' moral reasoning.

Research on threshold decision-making suggests that practitioners perceive 'tipping points' (Kettle 2017), where identified risks accumulate until they cannot be tolerated, or they engage in 'signal detection', whereby cues that indicate risk are focused on (Turney et al. 2024). These findings highlight that perceptions of whether a tipping point has been reached, or whether identified cues justify a safeguarding response, are influenced by moral as well as evidential considerations (Taylor and White 2001;

Kettle 2017). Hall (2019) makes the case that robust, morally persuasive stories are more likely to be convincing. As Weick et al. (2005) argue, it is ultimately the plausibility and persuasiveness of a narrative that enables it to be adopted and retained.

For social workers, being mindful of the fact that they are creating professional narratives rather than offering ‘the truth’ can encourage openness to revising narratives and promote greater reflexivity (Roets et al. 2017). Taking a narrative approach also encourages the sharing of professional narratives with individuals and families, and being curious about how their own narratives align (or not) with professional narratives (Roets et al. 2017). In order to ensure that social workers create ‘better stories’ (Weick et al. 2005) about the individuals and families they support, it is vital that they have opportunities for slower, analytical, and reflective thinking, and particularly space for reflexivity to consider how their own feelings and potential biases may influence their decision-making.

## Conclusion and implications for practice

Despite differences in service user groups, legal and policy frameworks, and organizational contexts, this article highlights striking similarities in how social worker engage in sensemaking activity.

Successful implementation of policy initiatives like personalization in adult social care in Scotland and reform of children’s social care in England ultimately relies on the capacity of the workforce. Part of this is ensuring that social workers are equipped to make transparent and robust decisions that protect and empower individuals and families. Structured opportunities for reflection and collaborative reasoning—such as regular informal time together in the office-space or providing group supervision—are essential to support better sensemaking. This is particularly important in a practice landscape where hybrid working has reduced face-to-face contact between colleagues and changed the way that practitioners engage with support (Jeyasingham and Devlin 2024).

It is important that organizations are mindful of how power dynamics within social work teams and between social workers, other professionals, and the people they support may influence the sensemaking process. Some individuals may not feel able to reciprocally participate in shared sensemaking (Gregory and Biggart 2024), and additional support through supervision or mentoring may be required to encourage these individuals to engage in sensemaking opportunities. It would also be useful to understand how individuals and families who receive services are involved in the sensemaking process, particularly through sharing their own narratives and checking out the professional narratives of social workers. Developing organizational systems that prompt social workers to check

their formulations with the individuals and families they support would help to achieve this.

It is crucial to support thoroughgoing sensemaking given the weight and significance of the decisions social workers make. This is all the more important during austere times where there is a risk that decisions may be based on available resource as opposed to need (Lymbery 2014; Parton 2014). Future research should explore how organizational structures can better support reflective and reflexive processes for individuals and teams, and how they encourage collaborative sensemaking with people accessing services, helping to ensure that social workers are equipped to make decisions that are both professionally robust and morally-attuned.

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