CHANGING FUTURES NORTHUMBRIA

Playbook

VERSION 1 - JUNE 2025

(to share)

CHANGING FUTURES
NORTHUMBRIA

CONTENTS

INTRODUCTION

Changing Futures is a 5-year, £91.8 million programme aiming to improve outcomes for adults experiencing multiple disadvantage – including combinations of homelessness, substance misuse, mental health issues, domestic abuse and contact with the criminal justice system.

Changing Futures Northumbria is a collaboration across the six local authorities of Gateshead, Newcastle, North Tyneside, Northumberland, South Tyneside, and Sunderland. It aims to improve the lives of adults who face multiple disadvantages, transform local services, and reinvent the way the system operates.

We will do this by basing everything around each person's understanding of 'What matters to me?' and going wherever the work takes us. This involves high-intensity work with those who are among the most vulnerable in our communities with an endeavour to ensure everyone has the relationships they need to thrive.

Relational work is dynamic, messy and often unpredictable. That's why we need something that helps us stay grounded in the values while adapting to whatever the day brings. Our playbook helps us do just that.

It's not a rigid manual. It's a living, evolving guide that brings together the key tools, approaches and principles that shape our way of working. It's written by and for practitioners — a shared resource we can return to, learn from, and build on.

The playbook is shaped by lived experience, frontline insights, and collaborative learning. It grows as we grow. And because we all contribute to it, it reflects the diversity and richness of the work we do.

Having a playbook means we don't have to start from scratch every time. It helps new team members get up to speed. And it makes the invisible work of relational practice more visible, which in turn makes it easier to value and sustain. It's one of the ways we make sure that the way we work reflects what we believe.

PART ONE

The work – our mission and method

MISSION

‘Everyone has the relationships they need to thrive’

One of the resoundingly common themes that has emerged from our work is the value of strong and positive relationships and also the extent to which those relationships are absent not only in the lives of the people we seek to support but also across the system we operate in.

Building strong positive connections around an agreed purpose is at the heart of our work. This begins with competent, confident autonomous teams, it extends to the people we seek to support and to those in their unique communities of support.

Our mission is to develop and iterate a way of working that strives to build cross sector networks of support, that enable people to develop the relationships they need to thrive. This includes supporting people to build unique and bespoke communities comprising positive family and friends, community, and organisational membership. It also includes developing an environment where staff can develop the relationships they need to thrive ensuring they can respond to the diverse nature of demand, in the context of high support and high challenge.

In achieving our mission, we have a commitment to,

- Adopting an experiential learning approach,
- Learning, iteration and continuous improvement
- Placing the people we support at the centre of everything we do
- High support and high challenge

THE LIBERATED METHOD

The Liberated Method is the collection of rules and principles that guide how we engage with the people we support. These rules and principles frame our approach and should be applied in the context of what is reasonably practicable. For example, making the decision to use the welfare fund to do an initial weekly shop for a person who is in financial hardship and new to the programme is reasonable. However, making the decision to repeatedly using funds from the welfare fund to do a weekly shop for a person when they have maximised their income and have capacity to make the decision how, where and when to shop is neither reasonable or practical and arguably conflicts with the rules and principles of the Liberated Method.

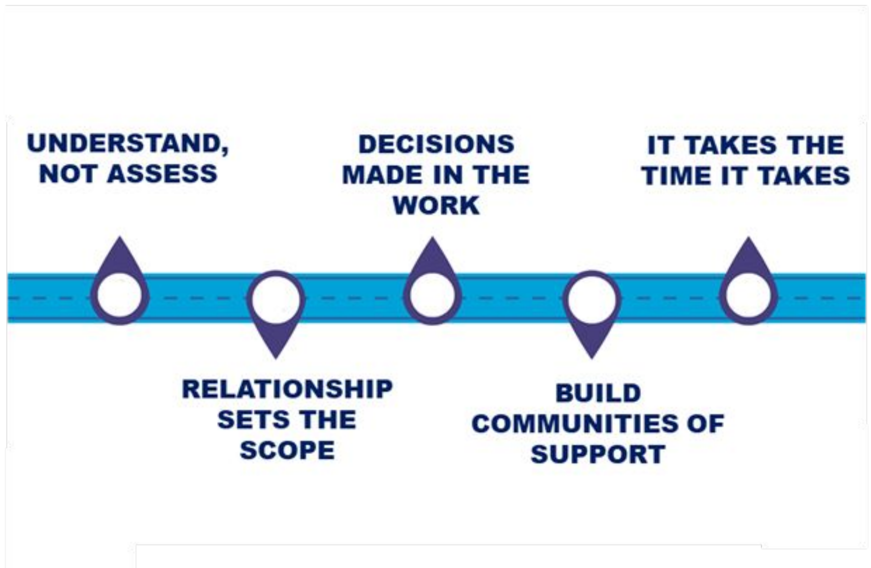
The rules and principles and are not intended for universal application, that is, they do not apply outside of the work to agree purpose and deliver the support necessary to achieve a given purpose. If you have supervision with your manager for example you cannot unilaterally decide to not attend under the principle of decisions made in the work. Rearranging supervision or any other protected time should be done in consultation with your manager and should be limited to exceptional circumstances.

The rules are mandatory, and as such non-negotiable, and the principles allow for flexibility in the work to absorb the diversity of demand the people we work with present with. There is no hierarchy within the principles, and they are not intended as a set of linear steps.

The Liberated Method

Rules

Principles



THE RULES

Agree Purpose

Work begins by identifying “what matters” to the person - both immediate needs and longer-term life goals. This shared purpose directs all future actions. For more details on how to do this please refer to section 4 of the Playbook.

Stay Legal

Besides the obvious need for all activities to fall within UK law and meet statutory and legislative requirements (like safeguarding or court orders), stay legal provides a firm basis from which to challenge policy interpretation and the resulting practice.

Do No Harm

Support must not cause physical, emotional, financial, or reputational harm. This includes avoiding unhealthy dependency, disempowerment, or loss of rights.

THE PRINCIPALS

Understand, Not Assess

Build a deep understanding of the person through conversation, observation, and reflection, rather than standardised assessments. Focus on:

- What matters right now (immediate priorities).
- What matters long-term (transformational change).

While assessments may still be required (e.g. for a medical diagnosis), they should not be the sole means by which purpose is identified and agreed. The goal is to listen, not label.

Relationship Sets the Scope

The relationship with the people we support defines the boundaries and nature of the work.

- Support is shaped with, not for, the person.
- Responsibilities may shift over time—from worker-led to person-led—as trust builds.

High support + high challenge is key to helping people move from crisis to independence.

Meetings (planned or unplanned) should always centre on the agreed purpose, while considering each person's needs, communication styles, and cognitive abilities.

Decisions in the Work

Workers are empowered to act swiftly and proportionately, without waiting for approval, when it helps achieve the agreed purpose.

- Use the 3R5P framework to guide decisions.
- The Welfare Fund can be used to remove barriers (e.g., transport, ID, basic needs). For more information on the Welfare Fund and how to use it, please see section 4 of the Playbook.
- Decisions must always comply with the three rules.

Build Communities of Support

Understanding who is involved in a person's life, family, friends, community groups and support providers and the role they play is crucial to achieving purpose. Building strong communities of support offers an opportunity to

- Bring everyone supporting the person together
- Build a consistent understanding of ‘what matters’ across the community
- Sequence support in a timely way (avoiding unnecessary referrals and assessments)
- Avoid duplication or working at cross purposes

It takes the time it takes

There are no fixed time limits for support activities, as long as they contribute to the purpose and are proportionate. This provides the flexibility to plan the frequency, duration, and length of support matching the time spent to the level of need. The time spent will ebb and flow as the relationship, and support network, grows recognising this is not a linear process.

Overall support will naturally reduce as the person grows in confidence and utilises their own support communities. Case closure should be an organic process informed by decreasing need for support around the purpose and not guided by an arbitrary deadline.

PART TWO

How we build a relationship and work with the person

BUILDING RELATIONSHIPS AND GETTING STARTED

Summary

This section describes what happens when meeting someone for the first time, and starting the relationship.

It describes what happens at each stage, the purpose, what the person should be thinking and how we want them to be feeling.

It then goes on to describe what we want the caseworkers will be doing, thinking and feeling at each stage.

Then there is a checklist for the case worker, and a description of where they can use their creativity and judgement.

After this summary, we describe the process in more detail.

THE PERSON'S EXPERIENCE

	Telephone call	First meeting (at a place comfortable for the person/worker)	Next appointment (e.g. walk or cuppa)	Purpose and planning sessions (1-3)	The sessions	Reflect and review (every 8 weeks)
Purpose	To be introduced to my workers To understand what Changing Futures is and how it can help.	What can I expect from CFN and my workers? To agree the contract and sign the consent form and privacy notice.	To get to know my workers and learn about Signal. To do Signal if appropriate.	Use Signal to help me decide where I want to focus and identify purpose. To agree on the short and possibly longer term goals of the work together. I decide what 10 looks like and where I am now. To look at possibilities and which one could work for me. I know who is involved in my support and consent to them meeting regularly.	To move towards the purpose in the ways we have agreed. Remain engaged and committed to the process.	To reflect on progress and where I am on the scale of 1 - 10 that I did. To review what is working and not working from my perspective and what to change/do next. To redo my lifemap to see what else I want to focus on.
Think	This is worth a shot - it is different to everything I have had before	I know what I need to agree to, and what I can expect.	This is someone I can trust who cares about me and it is different to what I have experienced before	I have a sense of direction and know what I need to do next.	I can see a bit of progress - I am moving forward	I can see the progress I have made and what to do next
Feel	A tiny bit of hope	Clear	Listened to and comfortable	Clearer	Bit more hope and excitement	Excited about the progress I have made. Hopeful.
Do	Open to arranging to meet in person.	Sign the forms	Commit to next meetings and to start opening up.	Commit to my part and our next meetings	Commit to my part and the sessions	Commit to next steps

THE CASE WORKER'S EXPERIENCE

Purpose	To introduce ourselves. To explain what Changing Futures is and how we can help. Do initial risk management plan. Consider any safeguarding.	Clarify expectations of both CFN workers and the person they will be supporting. Get the contract, privacy notice and consent form agreed and signed. Update risk management plan.	To start to create a trusting environment and start to get to know the person they are supporting and how they will best work with them. To introduce Signal.	Use Signal to help to understand the person better and identify purpose. To agree on the short and possibly longer term goals of the work together. Decide what 10 looks like and where the person is now.	To move towards the purpose in the ways we have agreed. Remain engaged and committed to the process.	To redo Signal. To review purpose and the 1-10 scales. To review the risk management plan.
Think	Confident that the person understood what I was saying, they could benefit from our support, and they are up for it	The person had the capacity to understand what was agreed to and has willingly given consent.	The person is open to this relationship and is committed to going forward.	The person is engaged in the process and wants to make positive steps towards change.	There is momentum to the work, things are progressing. We are seeing internal change.	Progress has been made and can be evidenced.
Feel	Positive and confident	Hopeful and confident that the person is on board.	Hopeful and empathic towards the person.	Confident, clear, like the relationship is building.	Positive about the work.	Clear and a sense of achievement. Ready and prepared for the case review.

THE CASE WORKER'S EXPERIENCE

Do	Arranging the face-to-face appointment. Talk through with colleagues if concerned about whether this person is up for this. Complete initial risk management plan on the digital platform. Ensure safeguarding policy is followed. Update the Journal on the digital platform.	Have the consent, privacy notice and contract agreements signed and uploaded to the digital platform. Update the risk management plan on the digital platform. Ensure safeguarding policy is followed. Update the Journal on the digital platform.	Start to understand the person and discuss Signal. Ensure safeguarding policy is followed. Update the Journal on the digital platform.	Complete Signal Complete the purpose plan and update it on the digital platform. Ensure safeguarding policy is followed. Know what other professionals are involved and have a network meeting in place. Update the Journal on the digital platform.	Update risk management plans where appropriate. Revisit purpose regularly to ensure staying on track. Ensure safeguarding policy is followed. Update the Journal on the digital platform.	Update Signal Update the purpose plan on the digital platform. Update the risk management plan on the digital platform. Attend a case review. Ensure safeguarding policy is followed. Update the Journal on the digital platform.

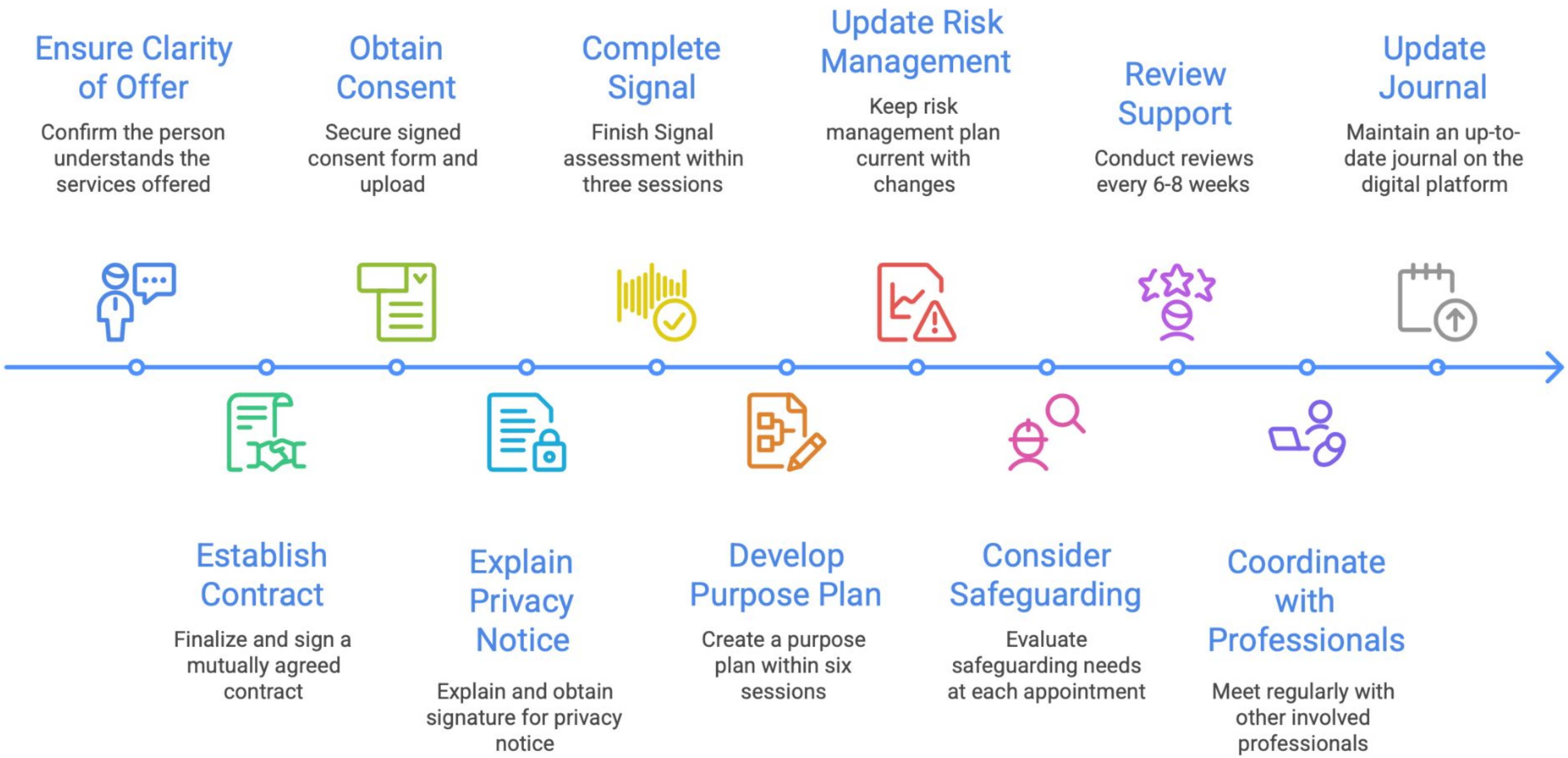
CHECKLIST - CORE RESPONSIBILITIES

This is the checklist for case workers to use at the end of the third session with each person, to reflect on their progress.

The 'must do's.

- I am confident that the person is clear about what we can offer
- I have a contract that has been mutually agreed and signed
- I have a consent form that has been signed and uploaded to the digital platform
- I have a privacy notice that has been explained and signed and uploaded to the digital platform
- I completed Signal within the first 3 sessions
- I completed a purpose plan within the first 6 sessions
- My risk management plan is kept up to date when there is any change.
- I consider safeguarding at every appointment and make referrals when necessary.
- I review each of the people I am supporting every 6-8 weeks.
- I know which other professionals are involved and we meet on a regular basis (network meeting)
- The journal up to date on the digital platform

Case Worker Checklist



Where I can use creativity and judgement:

This is where case workers can use their judgement and be creative

- I can negotiate with the person where and when to meet people
- I can be creative in my approach to agreeing purpose and what we need to do to achieve it
- I can be creative and innovative when deciding what the support will look like
- I can decide with the person I am supporting how often we will meet
- I can use my own style when facilitating Signal

Now each part in more detail

IDENTIFYING WHO WE WORK WITH

In Changing Futures Northumbria there is no referral pathway. The people we support are identified through agreed-upon points of the system where demand is high and need is not being met. We then working across silos and geographies and deploy High-Intensity Generalist practitioners in these specific service settings, such as Emergency Departments, to proactively approach the individuals with an offer of support based on the CFN relational working model. This removes the need for referrals, assessment and eligibility criteria and it meets individuals whee they are and builds relationships based on 'what matters?'.

Once someone has been identified the following process will then be followed:

The service that has identified the named individual will ask for permission to give CFN their details.
The person will be allocated to a CFN High Intensity working pair, which comprises of a High Intensity Caseworker and a High Intensity Lived-Experience Worker.
The allocated pair will actively try to engage with the person by approaching them in the setting that they regularly attend, i.e Emergency Department/Homeless Drop in, or via any contact details provided to us.
At the first appointment, the workers will explain what CFN is, how we can support and ask if they would like to join the programme.
If the person is willing to engage, then they need to sign the:
CONSENT FORM, **PRIVACY NOTICE** and a bespoke **CONTRACT** will be agreed between the CFN caseworkers and the person receiving support. This will be completed at the first or second appointment. No work can be carried out on behalf of the person until we have a signed consent form and contract agreement.

In the first 3 weeks of support, an initial Signal Lifemap will be completed, and in the first 6 weeks purpose will be agreed and there will be a clear action plan in place to work towards. (see 4 for guidance).
Purpose will be reviewed every 8 weeks in case management review.

INITIAL CONVERSATION

Purpose

The initial conversation provides an opportunity to set out what Changing Futures Northumbria is, and isn't, with someone who has expressed an interest in the programme. This is where the scope of the programme can be explained, and clarity can be provided on what level of commitment is expected both from the person and the staff.

The initial conversation allows for next step to be outlined and the notion of an agreement, based around purpose, can be introduced. It also provides the opportunity for people to ask questions about the programme, the type of support offered and anything else they may be curious about.

Example Conversation

Hi this is **'caseworker name'** calling from Changing Futures Northumbria. Your name has been given to us by **'insert referral team name'**, do you remember having that conversation? Is this something you're still interested in as I can tell you a bit about us and how we work.

Our work is about 'what matters to you' and understanding where you're at and what support you need. And we can work together to figure that out.

We work in pairs, my colleague is called **'insert caseworker name'**.

If you have any other professionals involved we will work alongside them and we can talk about this when we first meet. We'd like to meet you somewhere you'd be comfortable, this could be a coffee shop or somewhere in the community, so we can get to know each other, We have a consent form and privacy notice we will need you to sign. We'll bring it along with us.

Do you have somewhere in mind you'd like to meet? Anywhere close like a coffee shop or a community hub place that you use regularly. If not we can suggest somewhere and meet you there. **(Look this up prior to the call)**

Is there anything we need to be aware of in terms of any harmful habits, health conditions or accessibility needs (ie if you need to have a drink every day, take medication or need support with reading/writing)

We understand you may need to ‘have a drink/take your medication’ before we meet however we would ask that you weren’t intoxicated during our appointments. If there is anything we can support you with in terms of getting the best out of your appointment then please let us know. If you did need to cancel this appointment, please let us know and try and give us a day’s notice either by ringing or texting as you now have my number. You have my number now and can save this in your phone.

Do you have any questions?

AGREEING PURPOSE

Why do we need purpose?

Agree the purpose is one of the rules of the work. Agreeing on the purpose of the work with the person that you are supporting enables you to identify goals and aspirations to work towards. It ensures that the work you do has meaning and value and keeps things on track. Agreeing on the purpose helps to avoid confusion and ensures the support you are offering is helpful and aligned with the person's needs. It shows respect for the person's own goals and choices and gives ownership to the person. A clear purpose provides a tool to measure progress. It sets the boundaries of the work by helping to define what your role is and what their role is and can prevent any misunderstandings.

What tools can be used to identify purpose?

• Initial conversations/active listening – Get to know the person and use open-ended questions to explore what they want. Reflect back what the person says and summarise to check understanding.

• SMART goals – Specific, Measurable, Achievable, Relevant, Timebound.

• SIGNAL – helps to identify goals, set priorities and can be a visual tool to help motivate/measure progress.

• Strength-Based Conversations – Focus on what the person can do, build on their strengths and their interests.

THE PROCESS

a) Understand What Matters

- Complete a SIGNAL Lifemap
- What matters most to the person right now?
- What's not working in their life?
- What would they like to change?

b) Agree the Purpose

Work together to write a clear purpose statement: "The purpose of our work together is to…"
Can we measure progress against it?
Does it directly address what's not working?
Is it written in everyday language?

c) Define Success

Ask the person: "On a scale of 1 to 10, what would 10 look like if we successfully achieved this purpose?"
Write down what 10 looks like: ***10 means…***

d) Identify the Starting Point

Ask: "Where are you now on that scale?" (e.g. the person might say 2)
Write that number down as the starting point

e) Plan the Journey Together

Explore together how to make progress using the support sequence:

What can the person do themselves?

Can technology help?

Any home changes, equipment, or adaptations needed?

Are there friends, family, or neighbours who could support?

Are there local community or online groups that could help?

Are changes needed in universal services?

Do we need to explore specialist support?

You can use AI to support this plan and act as a research assistant. Please see section 4d for more details around using AI as a thinking partner. AI can also develop a draft 6 month support plan to review with the person and make decisions together.

f) Create a 6-Month Support Plan

Based on your discussion, sketch out a timeline for working together:

Month	Plan of Action
Month 1	
Month 2	
Month 3 - Let's check progress	
Month 4	
Month 5	
Month 6 - Let's check progress	

USING AI AS A THINKING PARTNER

Purpose

Using AI to Co-Produce Person-Centred Outcomes in Health and Social Care Purpose is something we are experimenting with in Changing Futures Northumbria. We will be using AI responsibly to co-develop meaningful, personalised outcomes with people they support, balancing data protection obligations with the need for specific information to develop helpful outcomes and goals.

Key Principles

- Person-Centred First
- AI is a tool to support—not replace—conversations and collaboration.
- Ensure outcomes reflect what matters to the person about the change they want to make, not just what's easy to record.

Ethical AI Use

- Be transparent: If you are using AI, let the person and/or their family/advocate know AI is being used and how it helps.
- Privacy: Never input personal data or identifiable information.
- Human Judgment: Treat AI suggestions as starting points, not final answers.
- Collaboration: Use AI to enhance, not replace, collaboration with colleagues, families and the person themselves.

Balancing Detail with Data Protection GDPR & Safeguarding Compliance

- Anonymise or pseudonymise personal details before inputting into AI tools.
- Do not share names, addresses, birthdates, NHS numbers, or any identifiers.
- Use initials or general descriptors (e.g., "a woman aged between 79 and 89 with mobility issues").

TIPS FOR SAFE AND EFFECTIVE USE OF AI

DO:

- ✔ Use pseudonyms, anonymised, narrative descriptions
- ✔ Involve the person and/or their family/advocate in refining outcomes and agreeing solutions.
- ✔ Double-check AI outputs for relevance and tone.
- ✔ Check AI outputs for quality in line with best practice when developing person centred outcomes.
- ✔ Ensure that AI output is not used to make inaccurate or misleading statements about individuals.

DON'T:

- Share any personally sensitive content
- Input identifiable information
- Upload any documents such as assessments or support plans
- Assume AI is always right
- Let AI define outcomes or goals without consultation

USING AI TO HELP CLARIFY PURPOSE AND TO SUGGEST OPTIONS FOR SUPPORT

Please note, this is a research tool and would not usually be done with the person.

1. Take the change the person wants to make (section 4d) and use AI to develop the specific outcome using the information you have.
2. Personalise the prompts for The Support Sequence without using identifiable information.
3. Use The Support Sequence prompt to generate ideas.
4. Use AI with the prompt provided, to evaluate and rank the suggestions with evidence/research if available, about what is most likely to make the most difference to the person in achieving the outcome.
5. Do any of these options need to be ruled out because of unintended consequences such as getting in the way of what's working, or are they unaffordable?

Explore the options with the person.

- What have they tried already that we can rule out?
- Which options are they most interested to try?
- Double check that the options the person wants to try for accuracy (e.g use google to check if and when venues are open)
- Agree when to review progress together (based on what the person wants to try e.g. this might be 3 months or 3 weeks).

Develop an implementation plan (6-month progress plan) using AI and the prompt.

Review progress within the agreed timeframe

- what's worked and not worked about what we have tried?
- What options generated at step 7 does the person want to try next?
- Set the next review date (this should be dependent on what you are trying.

For full access to the prompts that changing futures use, please see appendix

JOURNALING

Why do we journal?

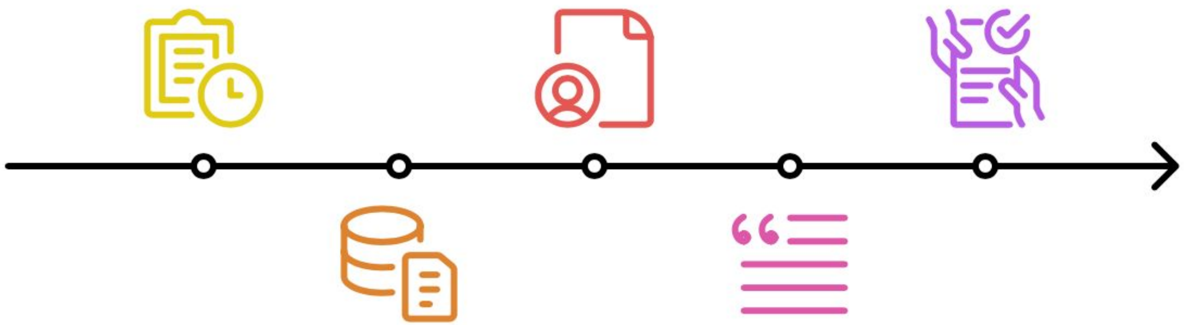
Journaling has a dual purpose in Changing Futures Northumbria. It not only serves as a way to record all contact with the people we support but it is a way of capturing what we are learning in real time. Journaling allows us to document all activity with a person and to track their progress. It provides a record of actions taken, decisions made and concerns raised which is crucial for protecting both the individual and the worker. Journaling allows you to track the person's journey over time, showing what has worked, what hasn't worked and how goals are being met. It also allows us to reflect on what we have learned and how we are feeling about the work.

Things to consider when doing your journal entries

- Journals should be completed promptly, as soon after the contact as possible. This is to ensure that records are accurate and to support time management.
- Ensure accurate recording of dates, times, names and places.
- You should record every contact that you have with a person or regarding a person. This includes face-to-face contacts, telephone calls, emails, meetings with professionals and text messages.
- When recording details of the direct contact, ensure the entry is factual and free of jargon/abbreviations.

- **Use FACTUAL**:
  - F Factual
  - A Accurate
  - C Clear
  - T Timely
  - U Understandable
  - A Avoid assumptions
  - L Legible/Logical

Journal Entry Process



Complete Journal Promptly

Ensure timely completion of journal entries

Record Accurate Details

Accurately document dates, times, names, and places

Document All Contacts

Record every contact made with or about a person

Use Factual Language

Maintain factual and clear language in entries

Apply FACTUAL Principles

Adhere to the FACTUAL guidelines for entry quality

RISK MANAGEMENT PLAN

Why do we do a risk management plan?

The purpose of the risk management plan is to keep yourself, your colleagues, the person you are supporting and the wider population safe. Identifying risks early reduces both the likelihood and impact of those risks. When risks are understood decisions can be made with full awareness and consideration of the potential outcome, leading to better decision-making.

Things to consider when writing a risk management plan.

- Risk management plans are a live document and should be kept up to date with any new information as soon as we get it.
- They should be reviewed every 6-8 weeks.
- Risk management plans can be recorded with information gathered from the person themselves, information received from other professionals and from the views and experiences of worker.
- What is the risk identified, who is at risk, what is the likelihood of it occurring, and how severe is the potential impact of the risk.
- What measures are in place to mitigate/reduce either the likelihood of it occurring or the severity of the impact.
- All risk management plans need to be recorded on the person's file on the digital platform.

Writing a Risk Management Plan

- What is the risk – Consider all risks – Violence and aggression, Physical Health problems, Mental Health Problems, Substance Misuse, Self Neglect, Criminal Activity, Abuse, Self Harm/Suicidal Ideation, Pregnancy, Homeless, Risk Taking Behaviours, etc
- Who is at risk – Remember this is not always just the person themselves, it could be you as the workers, other professionals, children, named individuals or members or the general public.
- The likelihood of it occurring – Is there a high, medium or low chance of the risk happening.
- The severity of the impact – is this high medium or low.
- What measures are in place to mitigate any risk – This is all about safety planning and needs to be robust and up to date. It could be things like – No lone working, no lone female working, all appointments to be in a public place, no home visits, details of any medication the person is on that support a physical or mental health condition, triggers that need to be avoided, etc.

LEARNING REVIEW

The Purpose

This meeting is to review each of the cases that we are supporting. It is an opportunity for us to develop learning from the work, directly from interactions with the people we support. We will use what emerges from the learning review meetings to understand if the work is fit for purpose and to identify any patterns and themes in the work.

The Process

- Pairs will be invited to a case learning review every 6-8 weeks.
- A Team Manager and either the Operations Lead or a Programme Lead will attend each of the meetings.
- The data and learning team will observe as and when required.
- In preparation for the review the Team Manager will read through the journals and upload the most up to date purpose plan and persons context document.
- The Team Manager will note any points of discussion ahead of the meeting.
- In preparation for the meeting the caseworkers should ensure all the persons journals are up to date including, Signal, Risk Management, Purpose and Persons Context.
- During the meeting the following points of discussion will be explored:
    - Social Capital
    - Internal Change
    - Relationships
    - Stuckness
    - System Responses
- The discussion will be recorded on the journals.
- Following each round of meetings the Leadership Team will meet to review any themes and learning. From this we can run experiments to test any theories we might have and make any agreed changes to the Playbook when required.

NETWORK MEETINGS

The Purpose

One of our guiding principles is building communities of support. We have learnt from the work we have already done, that this is a crucial element of the Liberated Method. Network Meetings help to build relationships and understanding with family, friends, community groups and support providers. They provide a forum to coordinate support for people and they help those involved in a person's journey to understand what matters to the person and their role in supporting the person to achieve this. Network meetings offer the opportunity to

- Bring everyone supporting the person together
- Build a consistent understanding of ‘what matters’ across the network
- Sequence support in a timely way (avoiding unnecessary referrals and assessments)
- Avoid duplication or working at cross purposes

THE PROCESS

- As soon as possible in the journey you need to get an understanding of who is involved in supporting the person and in what capacity.
- Some of these details will be on the initial form provided by the service that introduced the person to the programme, some the people will provide you with themselves and some may come from other support providers or referrals you make yourself.
- Within the first 6 weeks, caseworkers should work towards a meeting (either in person or virtual) with all of the people involved in supporting the person. It is best practice that the person themselves is at the meeting, however not compulsory, along with any supportive family and friends they have identified. If the person, and/or family and friends are attending, then please make all other attendees aware.
- At the initial meeting, explain what CFN is, why you have invited everyone and agree as a group how often you think you should meet. A minimum of monthly but can be more frequent if there is a need. As a guide, where there are lots of short-term actions (with one-to-two-week timescales attached) use this as a guide for the frequency of the meetings.
- In your pairs, take notes of what is discussed at the meeting and any action points agreed. Make these actions clear – What will be done, who will do it, and by when.
- Following the meeting, send the group the minutes of what has been discussed, all action points and upload the minutes to the journal.
- Agree a date for the next meeting and send out the invite.
- (Please note – If there is already a regular professional meeting/MDT already in place and chaired by a different service then seek to join that group rather than set up a parallel meeting)

CLOSURE

In keeping with our guiding principle that it takes the time it takes, we will continue to work with someone for the duration of the program as long as they are working towards an agreed purpose. There may be occasions when we will end the support earlier if any of the following apply:

1. The person no longer wishes to receive support from CFN.
   a. Allow the person some time to think about their decision first (recommended 7 days).
   b. Discuss at Group Supervision.
   c. Update the digital platform with the decision and any attempts made to continue the support.
   d. Update the Network Meeting attendees of the person's decision.
   e. Send a final **CLOSURE LETTER.**

2. Purpose cannot be agreed.
   a. Discuss at group supervision for advice and guidance.
   b. Allow the person some time to reflect on what they want (recommended 7 days)
   c. If purpose can still not be agreed discuss with Team Manager in the Case Review Meeting.
   d. If closure is agreed, update the digital platform with discussion and closure note.
   e. Update the Network Meeting attendee of the decision to close and rationale.
   f. Send a final closure letter.

3. There is a serious safety concern for the staff members working on the CFN program.
   a. Any serious safety concerns must be discussed with the Operation Lead or Programme Lead.
   b. Explore all alternative options before ending someone’s support , i.e change of workers, robust risk management plan, etc.
   c. If it is agreed that support should end update the Digital platform with discussion and closure note.
   d. Update the Network Meeting attendee of the decision to close and rationale.
   e. Send a final closure letter.

WELFARE FUND

Why do we have a welfare fund?

In Changing Futures Northumbria, we have a small budget that staff can use to help the people that they are supporting. The intended purpose of the welfare fund is to remove barriers where appropriate, support engagement and for emergency, short-term situations.

Things to consider when using the welfare fund budget.

- Use of the welfare fund should be a last resort, not a first option. You need to consider all other avenues first (see process below).
- As soon as possible, the person's income should be maximised. Staff should use a professional service when completing benefit claims and not attempt to do this themselves on behalf of a person. Citizens' Advice can support this.
- A budget form should be completed with every person. There is a budget planner available to staff that can be used.
- If the person is in any debt, please seek advice from a debt support agency such as StepChange Debt Charity – Their services are available online or via their helpline 08001381111.
- Use of any money needs to be a sustainable purchase for the person you are supporting. The money cannot be used to top up a person's income or as a form of ongoing support.
- Purchases should be one-off and not repeated wherever possible. Where a purchase needs to be repeated this should be agreed in group supervision.

THE PROCESS

- **All spending should be - PLANE.**
  - **P Proportionate**
  - **L Legal**
  - **A Auditable**
  - **N Necessary**
  - **E Ethical**
- Answer the following questions before every spend:
  - Can the person buy it themselves?
  - Do they have any family or friends who can financially support them?
  - Is there a free community resource?
  - Is there a grant/funding that they could access?
  - Can the local authority support?
- If you are still unsure if the spend is appropriate or there is a disagreement within the pair then please seek guidance from your colleagues at group supervision or a Team Manager.

Spending options

EXAMPLE 1: BUYING A WINTER COAT - MEETS PLANE

Proportionate	Caseworkers went to Mountain Warehouse as they were in the vicinity and noted a sale was on. The spend was similar to a supermarket spend due to the sale.
Legal	Yes
Auditable	Yes a receipt was obtained
Necessary	Citizen was always in a hoody in winter which didn't keep her dry and it was very cold.
Ethical	No harm was caused. The caseworkers deliberately bought a coat that would have been within her budget had her income been maximised. It was the right caring thing to do.

EXAMPLE 2: CITIZEN WANTED AN EXPENSIVE PRESENT FOR HER DAUGHTER - DOES NOT MEET PLANE

Proportionate	No, it was an expensive doll which was not a reasonable request
Legal	Yes
Auditable	Yes a receipt could have been obtained
Necessary	The citizen thought it was necessary to help rebuild a relationship with her child. However much cheaper options were available.
Ethical	No, it would send the wrong message to both the citizen and her daughter and set up unrealistic expectations for them both. It was not a sustainable spend.

PART THREE

How we build our relationships and support each other

BUILDING RELATIONSHIPS

Relational working means that we also pay attention to our relationships – how we work and learn together, and how we support each other and stay safe.

- We learn about each other be developing and sharing our one-page profiles.
- We decide how we work together and record these as team agreements. We review our team agreements every 4 – 6 months, and have different ways to keep focussed on them as a living document.
- We reflect on our individual progress and set ourself a goal to improve by using Confirmation Practices around our roles.
- We have group supervision to reflect and support each other
- We pay attention to our safety and follow the lone working/out of hours process.

One-page profiles

We believe that people flourish when they feel seen, heard and understood. Relational work includes our relationships with each other, and one-page profiles give us a head start on learning about each other. They are a simple but powerful way of capturing what matters to someone — what's important to them, what people appreciate about them, and how best to support them.

We use one-page profiles with each other. They enable us to move away from assumptions and instead build a shared understanding of each other as human beings.

See the **ONE PAGE PROFILE TEMPLATE** in the supporting documents

TEAM AGREEMENTS

We know that great work happens in teams where people feel safe, trusted, and respected. Team agreements help make that possible. Rather than leaving expectations unsaid, we bring them into the open. We create them together, as a team, so that everyone has a shared understanding of how we want to work with each other.

These agreements are human, practical commitments to one another — things like how we give feedback, how we make space for different views, how we repair trust when something goes wrong. They are based on what matters to the team and grounded in our values.

When people co-create agreements, it builds psychological safety. It means no one has to guess what's okay and what's not. It becomes easier to speak up, take risks, and ask for help. These are essential ingredients in complex, relational work — where change is rarely linear and where people bring all kinds of experiences to the table.

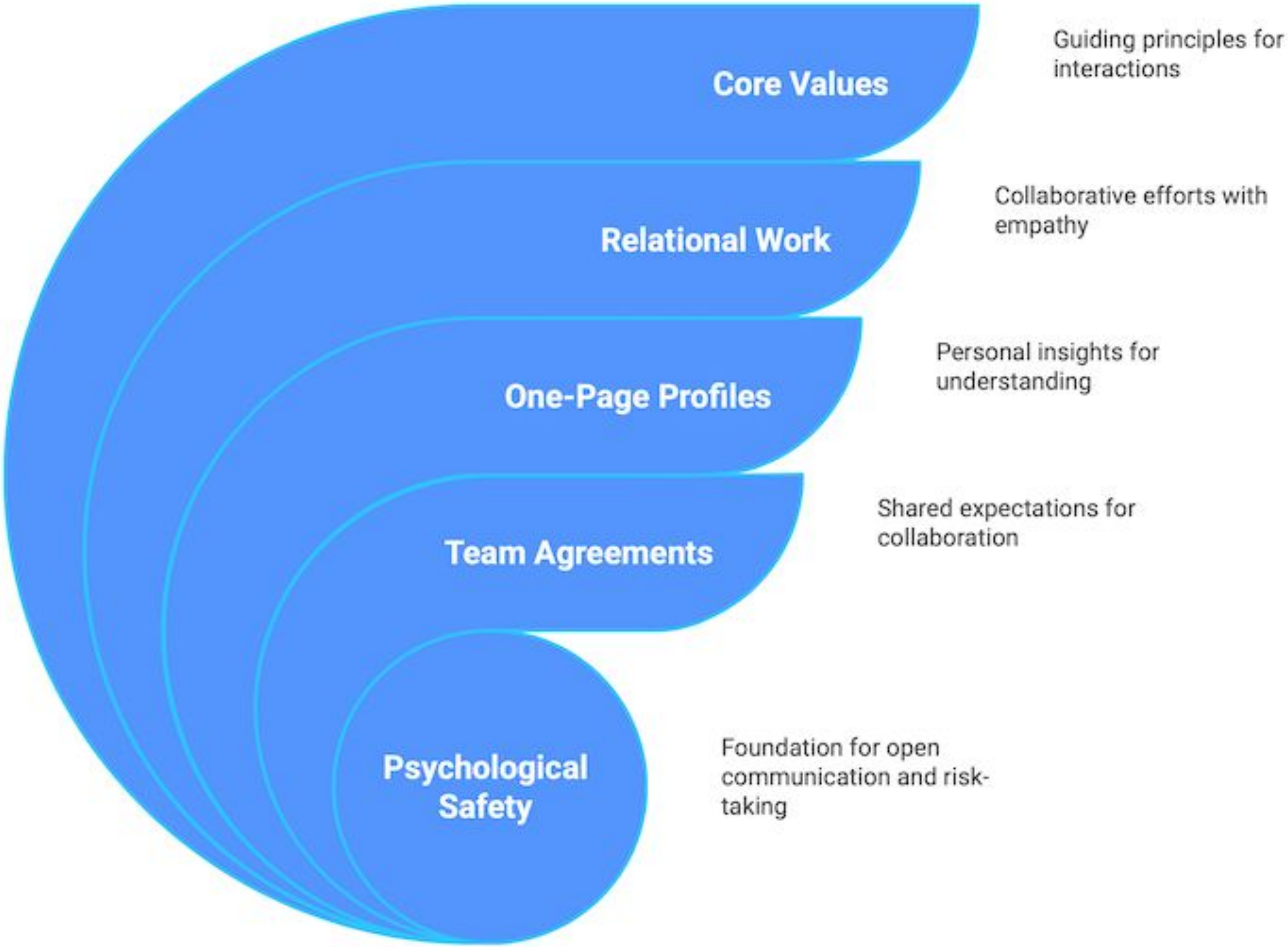
Team agreements also help us deal with challenge. In intensive work its easy for stress and assumptions to cloud communication. Clear, compassionate agreements give us something to return to — a way of checking in, naming tensions early, and resetting with care.

At Changing Futures, we use team agreements because they create the conditions for people to do their best work. They foster honesty, care and collaboration. And they help us model the kind of relationships we want to build with the people and communities we support.

Changing Futures Northumbria Team Agreements

- If a concern is on our mind for more than 2 days we bring it to the team or the person concerned, and ask to talk about it.
- We only commit to tasks we are willing/able to do, and if we can't meet a deadline we let others know in advance.
- We respect each other by waiting until someone has finished speaking before responding.
- We practice active listening, we encourage diverse perspective and ask for other ways to see a situation or problem.
- We disagree respectfully, having used clarifying questions. We understand different viewpoints and job roles using 'I' statements which avoid accusatory language.
- We look at the potential in everything and offer positive solutions rather than saying 'this won't work'.

Building Strong Team Dynamics



ONE TO ONES AND CONFIRMATION PRACTICES

One-to-ones are protected time for people to discuss their wellbeing, any personal development plans or areas for continuous professional development. It is a meeting with your direct line manager and a chance to discuss any training needs or opportunities, annual leave requests and HR processes. The one-to-ones are be carried out in line with your host organisation's policy and documentation.
One-to-ones are not about discussing individual people you are supporting, please use learning reviews or group supervision for this. At the beginning of every one-to-one there will be 30 minutes set aside for confirmation practice.

We use Confirmation Practices to create a more human-centred approach that foster trust, engagement, and continuous improvement within teams. These practices can be used around team agreements or roles and help to build psychological safety, accountability, and a shared sense of purpose. In Changing Futures Northumbria we have made confirmation practice around our roles part of our one-to ones.

The role document that we use is in the appendix. -

The process

- At the beginning of each 1-1 the staff member reviews their roles and scores themselves between 1-5 on how confident they feel in that part of their role and how well they feel they are achieving it. This is an intuitive decision so only 3 minutes is given.
- They then select which role they would like to focus on this month (usually the lowest score)
- They are then coached through a series of questions to establish why they have given themselves that score and what support they might need to improve it.
- They set themselves goals for the month.
- They then publish these goals in the team ‘Confirmation Practice’ channel.
- The team can support each other in achieving their goals.

Process for Confirmation Practices for Roles

01 Person reviews roles

02 Select Focus Role

03 Coaching Session

04 Decides on goal

05 Shares goal with team

06 Team Support

GROUP SUPERVISION

The Purpose

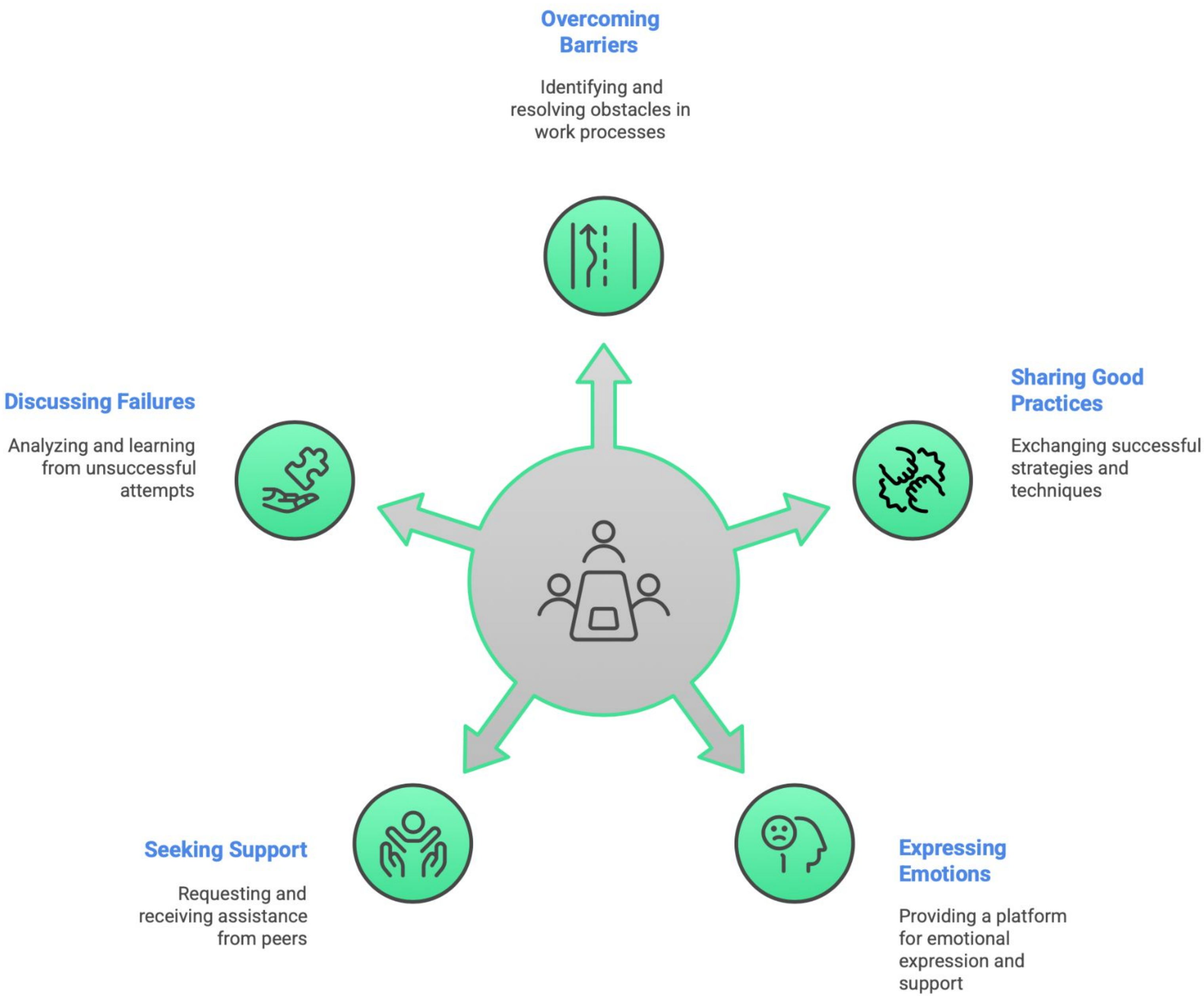
Group supervision is a safe space for workers to discuss any of the following:

- Blockages and barriers we are facing
- Problems we want help to resolve
- Share good practice/good wins
- Discuss frustrations we have / an opportunity to be heard
- Express emotions we are feeling /sounding board
- Support we need
- Safe space to share what hasn’t worked

It is not a space to discuss:

- Personal Issues we have with other staff members or professionals
- General discussions/gossip

Group Supervision



TEAM COMMITMENTS FOR GROUP DISCUSSION

The team worked together on a set of rules that they all agreed on to ensure that group supervision served its intended purpose and was a safe space for everyone. The team have agreed the following:

- We will attend our weekly group supervision unless we have a good reason.
- We commit to being fully present in our group supervision.
- We will be respectful of each other and be open to all feedback.
- We will be considerate of each other and ensure that our feedback is constructive.
- We agree that everyone has a voice, and we will not interrupt.
- We agree to take a comfort break when needed.
- We will make an effort to have lunch together after group supervision.

BEING SAFE: LONE WORKING / OUT OF HOURS

At Changing Futures Northumbria we work in pairs, however there may be occasions when you lone work. Lone working is any face to face contact that you have with someone where you are not supported by another member of staff and there is no other CFN staff onsite. This could include but is not limited to:

- Home Visits
- Transporting someone in your car
- Meeting someone in the community
-

Out of Hours working is any client engagement outside of your contractual hours. This could include but is not limited to:

- Telephone calls
- Meetings
- Face to face contact

Where possible always plan to work in pairs and plan to work in operational hours Monday-Friday 9 – 5. However, we recognise that it may be necessary at times to work alone or to work out of hours. When working out of hours this must always be agreed by your line manager or a member of the management team in advance. This is to ensure that there is someone on call to support should you need it.

LONE WORKING / OUT OF HOURS GUIDANCE

Please follow the guidance below when lone working or working out of hours (even if you're not alone).

1. Inform a manager/buddy and provide the following details:
    - Who you are supporting.
    - Where you are going to be
    - Expected time of arrival
    - Expected finish time.
2. Text or call manager/buddy when you start the lone/OOH work.
3. Text or call manager/buddy when you finish
4. If any plans change (time or location) update the manager/buddy as soon as possible
5. If you find yourself in an unsafe situation, ring for assistance.
6. If you feel unsafe but don't feel safe to say please use the agreed 'code phrase' to alert the responder "Has Sally Johnson turned up for her appointment?" we will then ask you a series of Yes or No answer questions:
    - Is your life in danger?
    - Do you need the police?
    - Do you need an ambulance?
    - Are you in the same location that was planned?
7. When you advise the manager/buddy, you feel unsafe or use the code word the emergency services will be called, and we will advise them of your location. We must know your whereabouts.
8. If we have not heard from you at the agreed finish time, then the manager/buddy will attempt to ring you.
9. If there is no answer after 3 attempts, we will try your personal number.
10. If there is no answer on your personal number we will contact the police.

TO SUPPORT THIS PROCESS, IT IS IMPORTANT THAT YOU ALWAYS ENSURE

1. Your work and personal phones are charged at all times.
2. Your personal contact details are up to date
3. You notify us of any changes to the agreed plan in a timely manner
4. You have a prior agreement to work out of hours as a manager or an agreed person will need to be available to support you throughout the visit.
5. Citizen risk management plans are kept up to date.

PART FOUR

Appendices

SUPPORT SEQUENCE PROMPTS

Relationship developer	In this role I develop a positive relationship with each person on my case load to help change each person's future.	• I have a small caseload of people who I am working with. • I work flexibly (balancing my time with what is required for the different people on my caseload). • With each person I focus on developing a positive, supportive relationship from the first meeting. • Within developing this relationship, I am conscious of the information I share about myself and maintain appropriate boundaries. • I promote and uphold people's rights in all aspects of the work I do.	• My caseload is between 5 and 10 people. • I can describe how I work to develop a positive relationship from the first meeting whilst maintaining my boundaries. • I can give examples of how I promote and uphold people's rights in my work with them.

ROLE BASED CONFIRMATION PRACTICES

Support co-designer	In this role I work with the person to design support that addresses what matters to the person and the changes they want in their life for a better future.	● I learn what matters to the person, and what they want to change about their life, and how we will know that this has happened. ● I explore a range of creative options with them to design their support. ● We have a plan that describes what we will do to make the changes that they want for their future.	● For each person I am supporting I can describe what matters to them and what they want to be different in their life, and what they will see/hear when these changes have been made. ● I can give examples of the range of options we explored together including using technology and what is available in the community. ● 100% of the people on my caseload have a plan that reflects what matters to them, the changes that they want to see in their life and our plan to achieve that.

Thoughtful risk taker	In this role I work with the person to make decisions and take considered, thoughtful risks to move towards the future that the person wants.	● I work with the person and key other people (partner organisations) to make decisions and take thoughtful risk to respond to dynamic needs. ● I convene meetings with partner organisations to ensure that others are aware of the decisions we are taking. ● The decision-making that I am involved in always takes into account safeguarding policies, and the three elements of Changing Futures (do no harm, don't break the law).	● I can give examples of the decisions and risks I am involved with, and why I see this as a thoughtful risk, and fits with the elements of Changing Futures and safeguarding. ● 100% of significant risks are documents on our risk management plans and shared with the team to show how I am mitigating risk and how we are learning from risk and decision-making.

Financial manager	In the role I am part of managing the financial resources of the team and use our money in a considered way when there are no other appropriate options available to support the person to move towards a more positive future.	• I understand the financial resources available and the money I can make decisions about myself and the decisions that need to be made with the team. • I use this to make decisions that support the person to move towards their future when no other option is available.	• I can describe how I am using finance with any of the people on my caseload and the decision-making process involved. • I am confident that my colleagues would say that I am managing finances in an appropriate and thoughtful way.
Partner co-ordinator and relationship builder	In this role I build relationships and work in partnership with other agencies in order to co-ordinate ways to enable the people I work with to move towards a more positive future.	• I contribute to case management meetings and network meetings as required in connection to the people on my case load. • I actively build relationships with other support providers and services in Northumbria.	• I can describe who and how I am actively building relationships with key agencies and support providers. • I contribute to case management and co-ordinate network meetings monthly and attend at least 80% of the ones that require my contribution. • I am confident that key people in the partner organisations would describe my contributions at meetings as positive and thoughtful.

Positive culture builder	In the role I actively contribute to building a positive culture within the workplace, and role model the values and ethos of our work in order for us to do our best work in supporting people's futures.	● I act as a conscious role model demonstrating the values, ethos, aims and objectives of the organisation. ● I follow the agreements that we have as a team about how we want to behave towards each other to create a positive workplace culture where everyone feels supported.	● I can give specific examples of how I have acted as a role model over the last month. ● I can give examples of how I have demonstrated living the agreements that we have as a team and supported or challenged others to do the same. ● I am confident that my colleagues would describe me as someone who contributes to creating a positive culture.
Information recorder	In the role I keep accurate and up to date records, maintain the relevant management information and actively contribute to the monitoring and evaluation of service delivery.	● Each day I update the relevant information and ensure that my records and management information are up to date. ● I actively contribute to information required for the monitoring and evaluation of service delivery.	● 100% of my records are up to date and accurate.

System and services change contributor	In this role I contribute to sharing learning and exploring how services and systems need to change to make it more likely that we can support people to change their futures.	● Each month I attend and participate in project discussions and team meetings as required. ● I work with team members to identify changes needed to systems and services to improve the outcomes for people facing multiple disadvantages.	● I can give examples of how I have contributed to identifying the changes required to services and systems (and the way we work).
Changes Futures Champion	In this role I actively and positively represent the way we work and what we do, I promote this way of working that enables more people to positively change their future.	● I take and seek opportunities to promote the way we work and the organisation.	● I can give examples of how I have promoted this way of working in the last month. ● I am confident that people would describe me as a champion of this way of working.

Reflective practitioner	In the role I keep up to date with relevant developments and improve my personal performance, contribution, knowledge and skills to keep improving the difference we make in peoples lives.	● I prepare for and participate in supervision and appraisals. ● I actively keep abreast of developments in services, legislation, and practice relevant to the people I support. ● I identify areas that I want to improve in and have a plan to improve my personal performance, contribution, knowledge, and skills.	● I can describe the areas that I want to improve in and what I have done over the last month to improve. ● I have a goal that I am working on this month and can describe how I decided to work on this area and what I am doing.

OUTCOME AND SUPPORT SEQUENCE PROCESS TOOLS

Summary

This process provides a step by step approach to using AI alongside the skill of team members to create change for the person.

AI cannot replace what skilled practitioners do. We see it as a thinking partner that supports the process. Practitioners develop the relationship with the person, and over several sessions learn what matters to them, what is working and not working, their priorities for change, their purpose(s). They decide together what success would look like - eg what 10 would be, and where they are now.

Then the practitioner can use AI to help clarify the purpose and generate ideas through the Support Sequence, and rank these in order of effectiveness. The skill of the practitioner is how they share the ideas with the person, and support them to choose the ones that they want to take forward (informed by the information on which ones are likely to be the most effective).

AI can then put that into a 6 month plan to start with (a starter for 10 not a prescription), and practitioners can adapt this with the person and keep reviewing and adapting this with the person. The practitioner's skill is in relational work.

AI supports this as a co-thinker or researcher, providing ideas that can be shared with the person, and the person can choose from. Ensure that you are aware of principles and considerations before starting the process. - Using AI to Co-Produce Person-Centred Outcomes in Education, Health and Social Care.

STEP ONE - DONE WITH THE PERSON
If you are already working with the person and know what matters to them.

- What does the person want to change? (the purpose/broad goal)
- What is not working for them now about this?
- What is important to them about this?

If you are starting work with someone and getting to know them.

- What matters to the person?
- What's working and not working now?
- What does the person want to change? (the purpose/broad goal)

STEP TWO - DONE WITH THE PERSON
- What is the broad goal? This should describe the change the person wants to make?
- What does 10 look like?
- Where are you now on a scale of 1 - 10?
- What does halfway between where the person is now and 10 look like?

STEP THREE - RESEARCH (NOT USUALLY DONE WITH THE PERSON)
Take the change the person wants to make and use AI to develop the specific outcome using the information you have from step one with the prompt.

STEP FOUR - RESEARCH (NOT USUALLY DONE WITH THE PERSON)
Personalise the prompts for The Support Sequence without using identifiable information. (using information from step one). Use The Support Sequence prompt to generate ideas.

STEP FIVE - RESEARCH (NOT USUALLY DONE WITH THE PERSON)

Use AI with the prompt provided, to evaluate and rank the suggestions with evidence/research if available, about what is most likely to make the most difference to the person in achieving the outcome.

STEP SIX - RESEARCH (NOT USUALLY DONE WITH THE PERSON)

Do any of these options need to be ruled out because of unintended consequences such as getting in the way of what's working, or are they unaffordable?

STEP SEVEN - DONE WITH THE PERSON

Explore options with the person.
What have they tried already that we can rule out?
Which options are they most interested to try?
Double check that the options the person wants to try for accuracy (e.g use google to check if and when venues are open)
Agree when to review progress together (based on what the person wants to try e.g. this might be 3 months or 3 weeks).

STEP EIGHT - RESEARCH (NOT USUALLY DONE WITH THE PERSON)

Develop an implementation plan (6 month progress plan) using AI and the prompt.

STEP NINE - DONE WITH THE PERSON

Review progress within the agreed timeframe - what's worked and not worked about what we have tried?
What options generated at step 7 does the person want to try next?
Set the next review date (this should be dependent on what you are trying.