Changing Futures Northumbria

Playbook

VERSION 2 - DECEMBER 2025

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Introduction

Changing Futures is a 5 year, £91.8 million programme aiming to improve outcomes for adults experiencing multiple disadvantages – 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 endeavor 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

‘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.

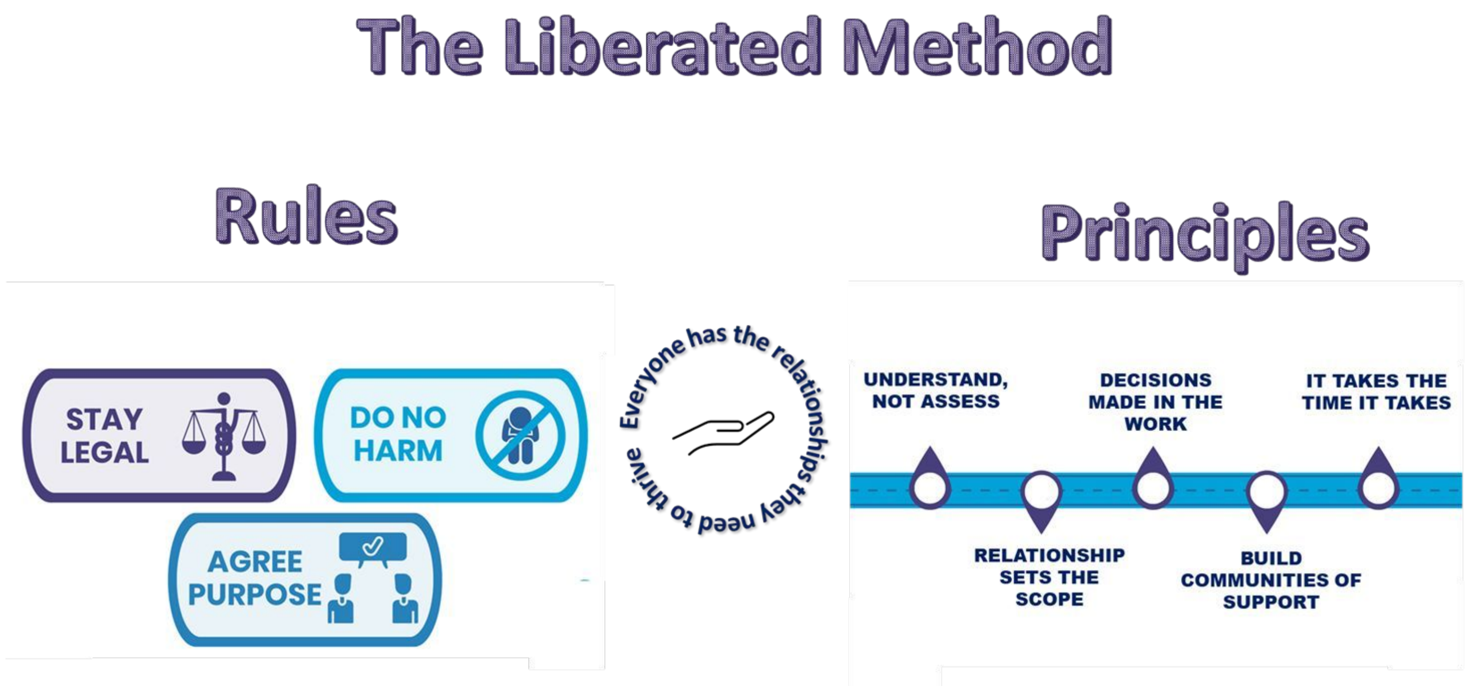
In achieving our mission, we have a commitment to,

- 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 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 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 Principles

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 purpose

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 the caseworkers will be doing, thinking and feeling at each stage.

Then there is a checklist for the caseworker, 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	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.
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
Feel	A tiny bit of hope	Clear	Listened to and comfortable
Do	Open to arranging to meet in person.	Sign the forms	Commit to next meetings and to start opening up.

The person’s experience

	Purpose and planning sessions (1-3)	The sessions	Reflect and review (every 8 weeks)
Purpose	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	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	Clearer	Bit more hope and excitement	Excited about the progress I have made. Hopeful.
Do	Commit to my part and our next meetings	Commit to my part and the sessions	Commit to next steps

The caseworker’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.
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.
Feel	Positive and confident.	Hopeful and confident that the person is on board.	Hopeful and empathic towards the person.

The caseworker's experience

Purpose	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.	To redo Signal. To review purpose and the 1-10 scales. To review the risk management plan.
Think	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	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 caseworker’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.

The caseworker's experience

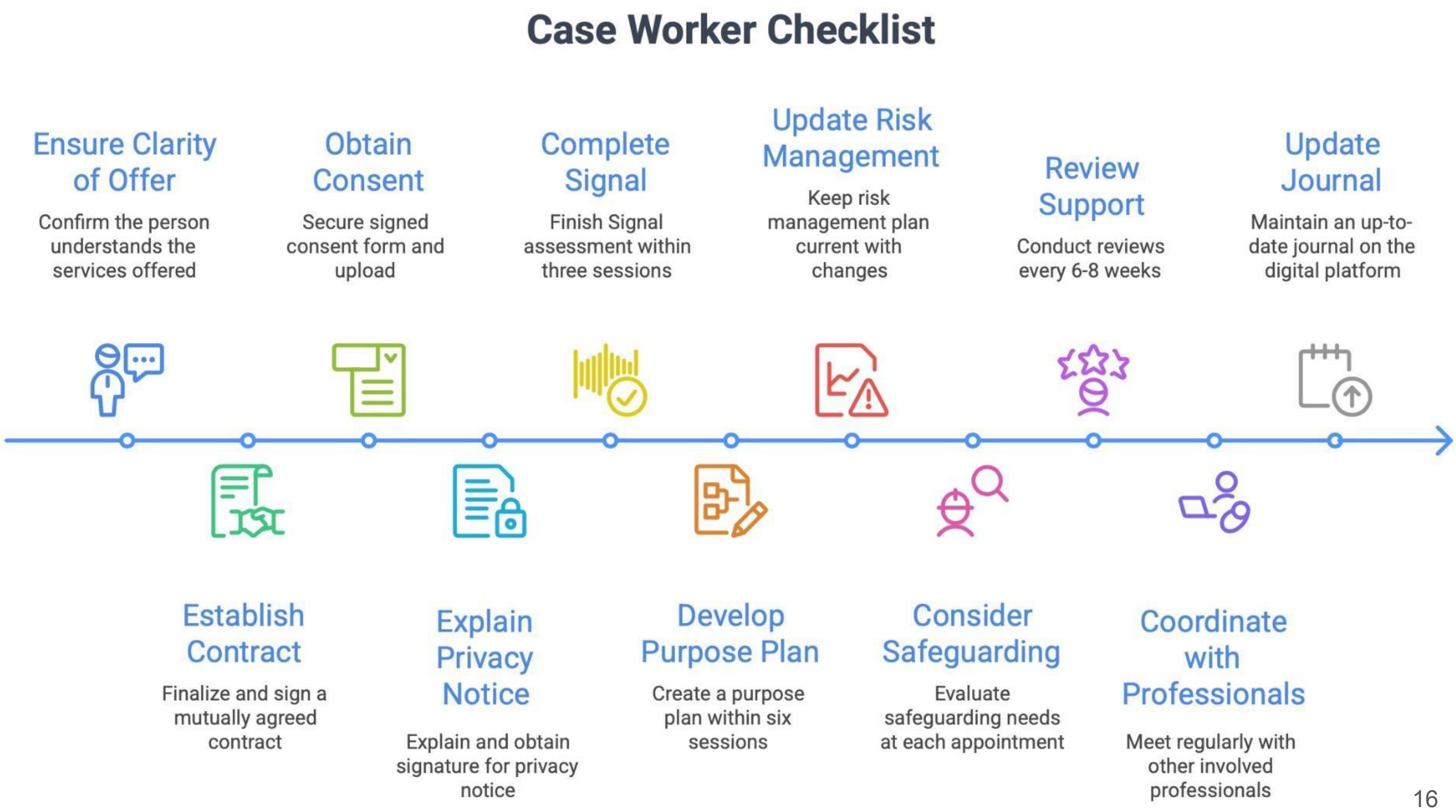
Do	Complete Signal Complete the purpose plan and update it on the digital platform. Ensure safeguarding policy is followed. Know what other professionals are involved and have a network meeting in place. Update the Journal on the digital platform.	Update risk management plans where appropriate. Revisit 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



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 where 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?

Introducing CFN to professionals

When we discuss Changing Futures Northumbria, it’s important to understand that we are a learning programme rather than a traditional service.

Our focus is on supporting people facing multiple disadvantages, and we do this by working closely with a small number of cases so we can truly understand what matters to each individual.

We use the Liberated Method, which is a holistic, person-centred approach combining high support with high challenge.

A key part of our role is assembling a team of professionals around the individual, ensuring everyone involved in their support is connected and working collaboratively.

Our aim is always to work alongside partners to learn, adapt, and support people in ways that genuinely meet their needs.

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.

SIGNAL

SIGNAL is a simple, supportive tool designed to help people think about what really matters in their lives. Instead of telling them what they should do, it gives them space to reflect on their own priorities and choices.

Together with a **trusted guide**, they create a **Lifemap** - a clear, visual picture of where they are now and where they'd like to go next.

How it works

You'll have a relaxed, one-to-one chat with someone who listens carefully. SIGNAL helps bring together the different parts of a person's life into a single picture, showing what's going well and highlighting areas that might need more attention.

You don't need to prepare anything. The process is calm, structured, and moves entirely at the person's pace.

What SIGNAL offers

- **Clarity** – It helps people see their lives more clearly, so things feel less overwhelming.
- **Confidence** – It highlights strengths and helps people feel more in control of next steps.
- **A Safe Space** – It's a chance to be listened to with care and respect, in a gentle and supportive way.
- **Hope and Direction** – By the end, many people feel lighter, more positive, and ready to take the next step.

Why it matters

If someone feels stuck, overwhelmed, or unsure where to start, SIGNAL helps them sort through the noise and focus on what matters most. It's not about what others think they need - it's about giving them the tools and confidence to make their own decisions and shape the life they want.

Your role as a trusted guide

You're not an assessor - you're a guide.
Your role is to listen, not to fix; to help people notice patterns and possibilities; and to give them space to make sense of their own story. SIGNAL works best when people feel they are **leading their own journey**. Your curiosity, warmth, and patience make all the difference.

Framing the invitation

When introducing SIGNAL, focus on curiosity and collaboration:
"What's important to us is understanding what matters to you - and we have a simple, visual way to explore that together by building your Lifemap."

This approach builds trust, interest, and a sense of shared purpose.

Once the Lifemap is built, invite reflection:
"Let's look at this together - what stands out for you? Are there one or two things you'd most like to focus on, or anything that gets in the way?"

This reinforces that SIGNAL is about **agency**, not assessment.

Do's and Don'ts

Do say things like…

"Let's build your Lifemap together."
"What matters to you?"
"Signal helps you tell your story."
"It's fun and easy to use - and if we don't finish it in one go, we can carry on next time."
"Let's find out how else we can support you."
"Now we get to focus on what really matters."

Don't say things like…

"Can you complete this assessment please?"
"We have to do it because it's part of the programme."
"Signal will assess your situation."
"There are 54 questions so if we run out of time we'll have to make another appointment."
"You might be eligible for more support."
"Now we've got the paperwork out of the way."

Managing change and mindset

SIGNAL represents a small but important shift - from *doing to* towards *working with*. It asks us to slow down, to listen differently, and to build relationships where people's own insight leads the change. Change takes time. But by using SIGNAL with curiosity, empathy, and consistency, we help shape a culture where listening and agency sit at the heart of support.

The Process

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?

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?

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…***

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

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.

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 to agree 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.

- Take the change the person wants to make (section 4d) and use AI to develop the specific outcome using the information you have.
- Personalise the prompts for The Support Sequence without using identifiable information.
- Use The Support Sequence prompt to generate ideas.
- 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.
- 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.

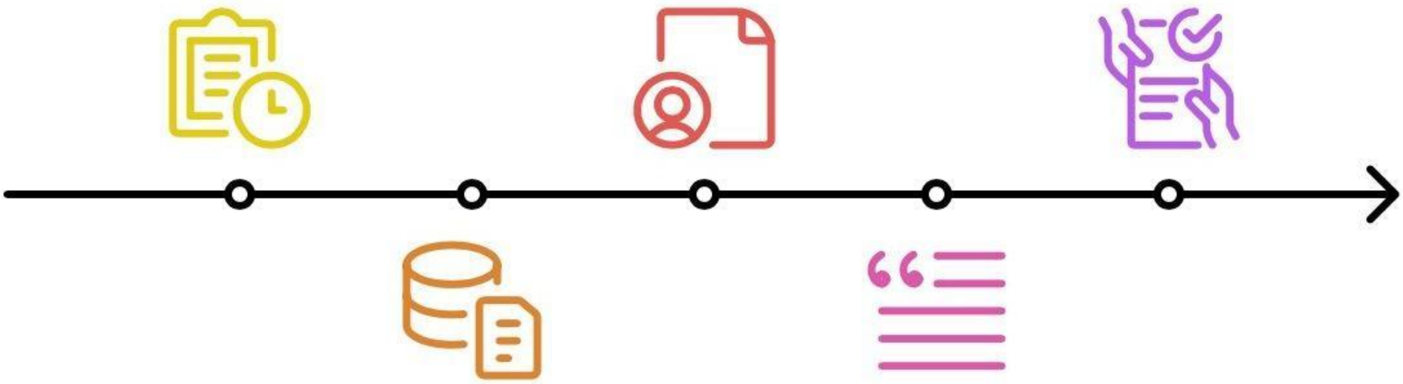
Things to consider when doing your journal entries

- 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

Learning reviews are the process by which we test our firmly held beliefs and practices in relation to tackling the impact of multiple disadvantage and our endeavour to achieve better outcomes for individuals, services and the system.

The explicit purpose is to improve our awareness and understanding of what good looks like, based on your experiences in supporting individuals to overcome multiple disadvantage. It is the process by which we develop new knowledge that allows us to reflect on our current practice and make more confident decisions about what things may need to change.

Learning reviews seek to explore four key themes

- The things we are aware of and understand (Known knowns)
- The things we are aware of and do not understand (Known unknowns)
- The things we are not aware of and do understand (Unknown knowns)
- The things we are not aware of and do not understand (Unknown unknowns)

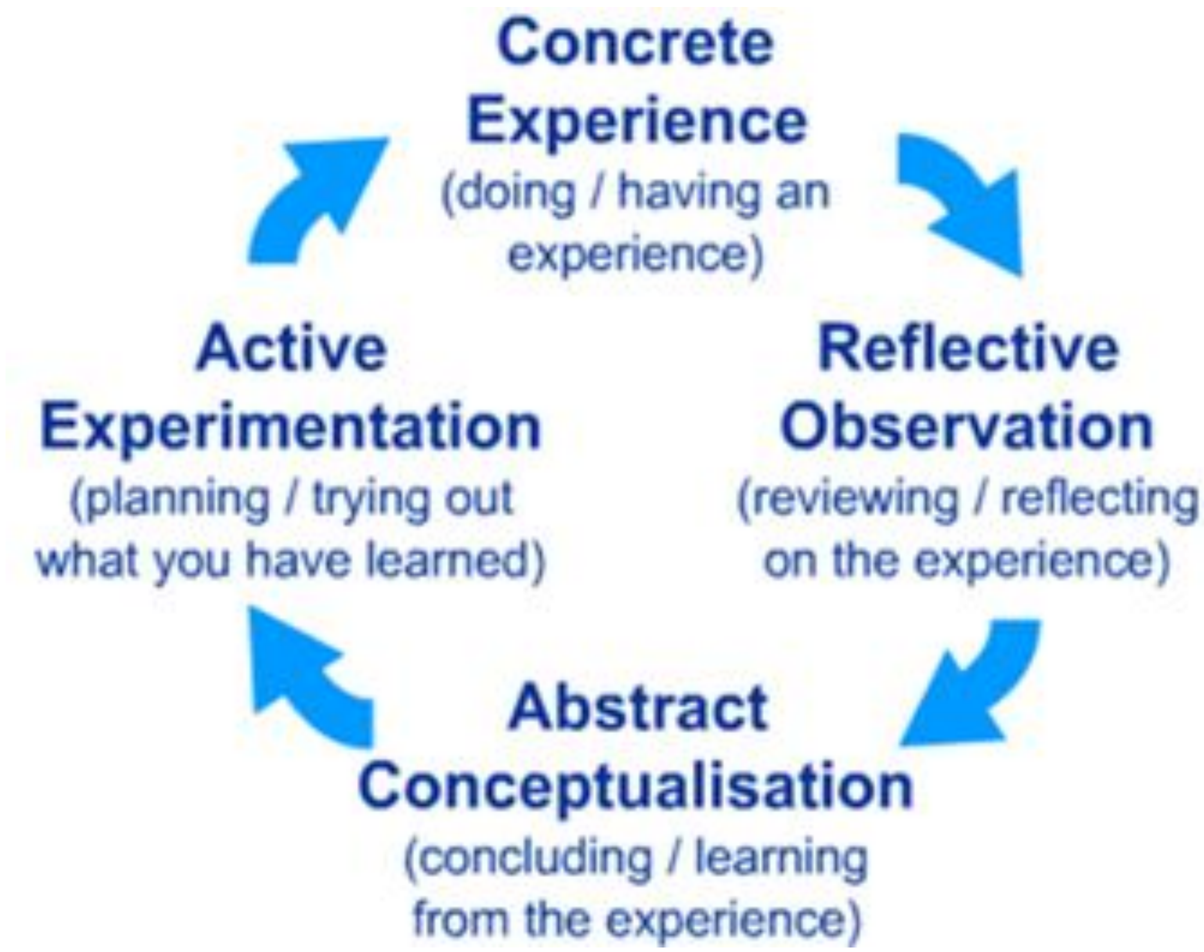
Underpinning theory

The learning review approach is built around two key approaches

Kolb's cycle of experiential learning

This approach is based in the principle of 'learning by doing' and has four distinct stages,

- Concrete experience, you encounter a new experience or reinterprets an existing experience.
- Reflective observation, you reflect on the experience on a personal level.
- Abstract conceptualisation, you form new ideas, or modifies existing abstract ideas, based on your reflections.
- Active experimentation, you apply the new ideas to see if anything changes.



As an example, if we take your efforts to support a person to achieve a specific purpose as the concrete experience stage, we can then use your own critical analysis, peer support, case management & group supervision and network meetings as opportunities for reflective observations.

Moving to abstract conceptualisation, based on your reflections, you can form new ideas about what you might do next. This takes you to active experimentation, putting those ideas into practice, which in turn brings you back to having a concrete experience.

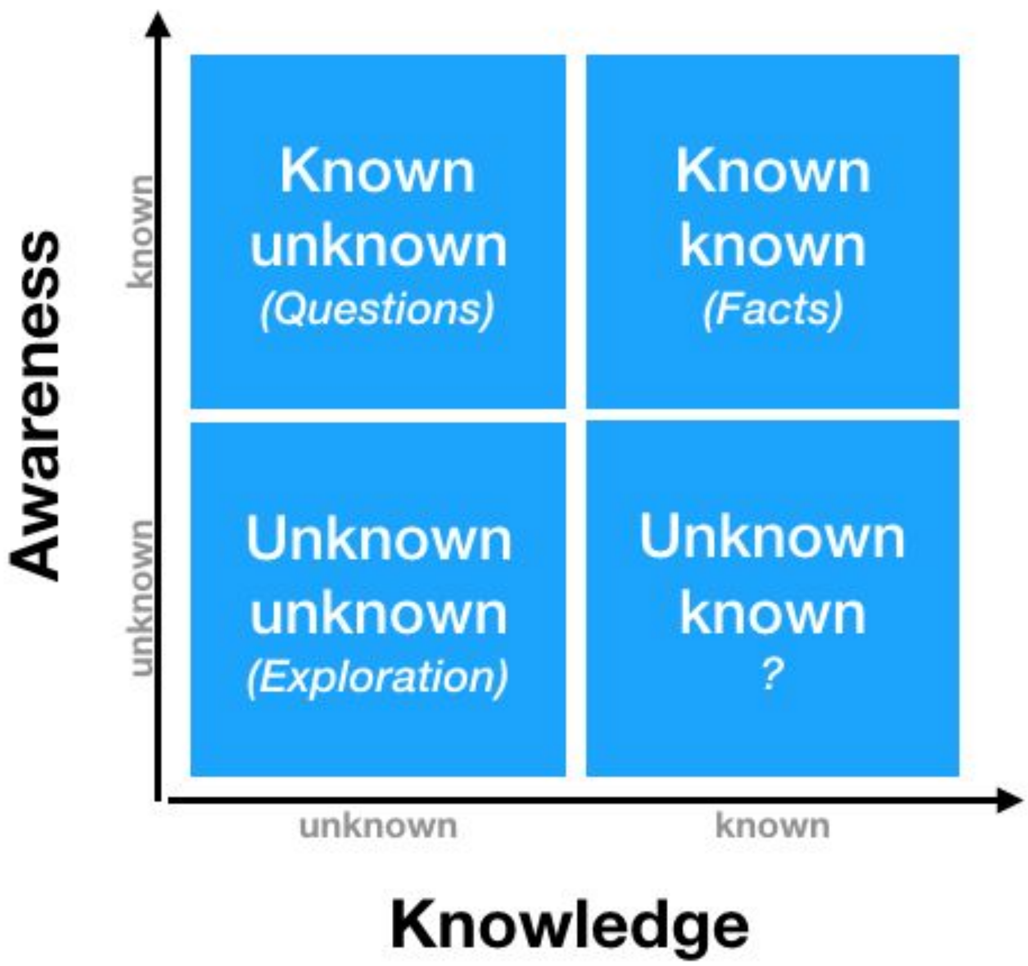
The learning review allows a space to consider activity aligned to the four stage learning loop of Kolb’s cycle and also provides additional opportunities to reflect and conceptualise, which in turn may identify new areas of enquiry. In practice, multiple learning enquiries will be happening simultaneously; these learning loops help drive improved understanding and also surface new lines of enquiry.

The Rumsfeld Matrix

It is a framework that is designed to support decision making by improving our awareness and understanding of the work to challenge multiple disadvantage.

It provides a structure that allows us to explore four key themes:

- The things we are aware of and understand (Known knowns)
- The things we are aware of and do not understand (Known unknowns)
- The things we are not aware of and do understand (Unknown knowns)
- The things we are not aware of and do not understand (Unknown unknowns)



Surfacing unknown unknown, the things that we do not know and are not currently in our conscious thinking, allows us to understand what new lines of enquiry we may want to explore next, which is the starting point for a new learning loop.

The Process

Learning reviews will be scheduled with each casework pair on a 6-8 week cycle. The learning review conversation will be semi structured and supported by the most recent:

- SIGNAL Life map
- Monthly report

The review will focus on four key questions, which will be supported by several supplementary questions that will help to develop a deeper understanding and act as prompts to move the conversation on.

The aim is to achieve a discursive approach that provides the means by which caseworker pairs can share their understanding, thoughts, assumptions and challenges in relation to each case.

What do we already know for certain about this person and their situation, what's clear, evidenced, and agreed?

- What do we know for certain about their circumstances, needs, and strengths?
- Who is involved in their support, and what's working well?
- Who is involved in their Network meetings?
- What purpose has been agreed and why?
- What do we know about our role and responsibilities in supporting purpose?
- What's already helping or enabling progress?

What do we know we're missing, what feels unclear or uncertain about this person's story or the support around them?

- What don't we yet know about this person's story or context?
- Whose perspective is missing from this support?
- Whose input is missing from their network meetings?
- What assumptions are we making rather than testing?
- Where do we lack evidence or understanding?
- What information do we need to move forward confidently?

What might we know without realising it, things we assume, sense, or take for granted that could be shaping how we see this case?

- What do we ‘just know’ about how things work here?
- How might our experience or values be colouring our view?
- What have we learned from similar situations that we haven’t applied here?
- What unspoken beliefs might be influencing decisions?
- Are there things you feel and haven’t said out loud?

What might we be missing entirely, what hasn’t been said, who hasn’t been heard, or what might surprise us if we looked from a different angle?

- Who or what isn’t represented in this case that could change our understanding?
- What might surprise us if we stepped into this person’s shoes?
- What could happen next that we haven’t planned for?
- How might the system itself be creating barriers or limiting options?
- What questions should we be asking that we haven’t thought to ask yet?

Who will attend and why

Each learning review will be attended by a casework pair and a team lead, with an operations lead or programme lead also attending. The data and learning team will also attend to observe as and when required.

Typically, as managers progress through a leadership structure, they become more removed from the day to day activity and are less able to observe what is happening, which reduces awareness and understanding of what is going well, where challenges exist and what may need further attention or change. At the same time, their ability to affect change through operational and strategic decision making increases. This gives rise to the risk of less well informed decision making.

The learning review provides an opportunity for all levels of leadership to connect and develop a shared awareness and understanding of the work. This in turn enables more insight into what’s going well, where challenges exist and what may need further attention or change and services to improve decision making. This includes developing an awareness of new areas of enquiry and an understanding of where to start with new learning loops.

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 arrange a Network 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. There is a template email invite in the appendix to support this.
- 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. There is a template meeting agenda with guidance notes in the appendix.
- 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:

The person no longer wishes to receive support from CFN.

- Allow the person some time to think about their decision first (recommended 7 days).
- Discuss at Group Supervision.
- Update the digital platform with the decision and any attempts made to continue the support.
- Update the Network Meeting attendees of the person's decision.
- Send a final **CLOSURE LETTER.**

Purpose cannot be agreed.

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

There is a serious safety concern for the staff members working on the CFN program.

- Any serious safety concerns must be discussed with the Operation Lead or Programme Lead.
- Explore all alternative options before ending someone’s support , i.e change of workers, robust risk management plan, etc.
- If it is agreed that support should end update the Digital platform with discussion and closure note.
- Update the Network Meeting attendee of the decision to close and rationale.
- 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 reasonably 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.

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 a 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 by 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 focused on them as a living document.
- We reflect on our individual progress and set ourselves 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.

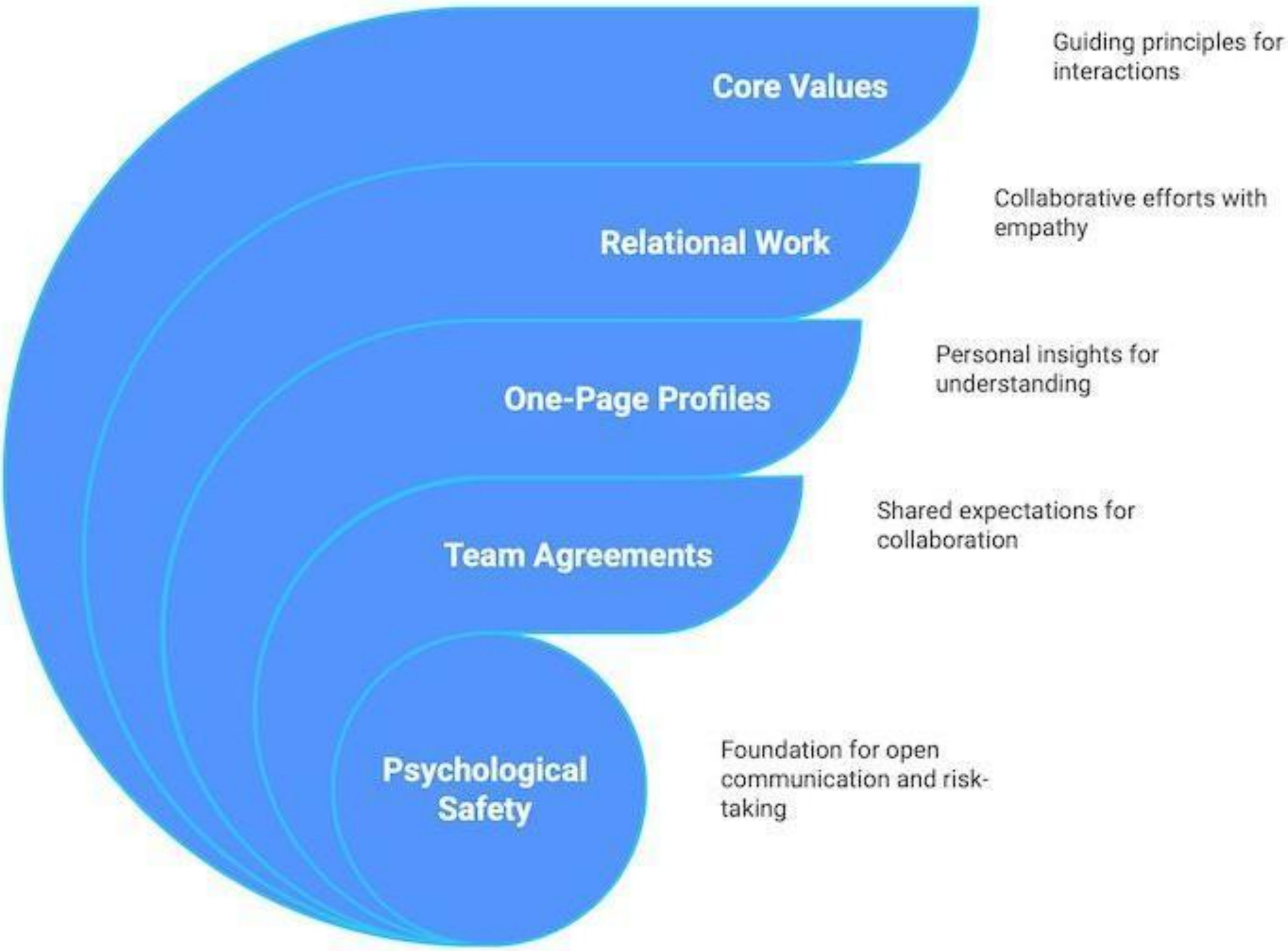
Team agreements also help us deal with challenge. In intensive work its easy for stress and assumptions to cloud communication. Clear, compassionate agreements give us something to return to — a way of checking in, naming tensions early, and resetting with care.

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 keep our contributions concise so everyone has time to be heard, we invite quieter voices to contribute before moving on.
- We respect each other by waiting until someone has finished speaking before responding.
- We regularly ask each other about workload and stress to explore what we can do to support.
- We disagree respectfully, hearing different viewpoints.
- When a concern about another person is raised, we ask 'have you spoken to them yet' and offer support if needed.

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 and structured space for us to come together as a team and openly reflect on our work. It's a place where we can talk through any blockages or barriers we're facing, bring problems we'd like support in resolving, and share good practice or recent wins. It also gives us the chance to voice frustrations, express emotions, and use the group as a sounding board when things feel challenging. We can identify the support we need and openly explore what hasn't worked, without judgment, so we can learn together.

It is not a space to discuss:

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

Group supervision structure guide

- **Check-in**
  We begin with a check-in, moving around the room so each person has a turn to speak. This is a brief opportunity for everyone to share how they're feeling and what's going on for them. The aim is to understand where people are at emotionally and mentally before we begin the reflective work.

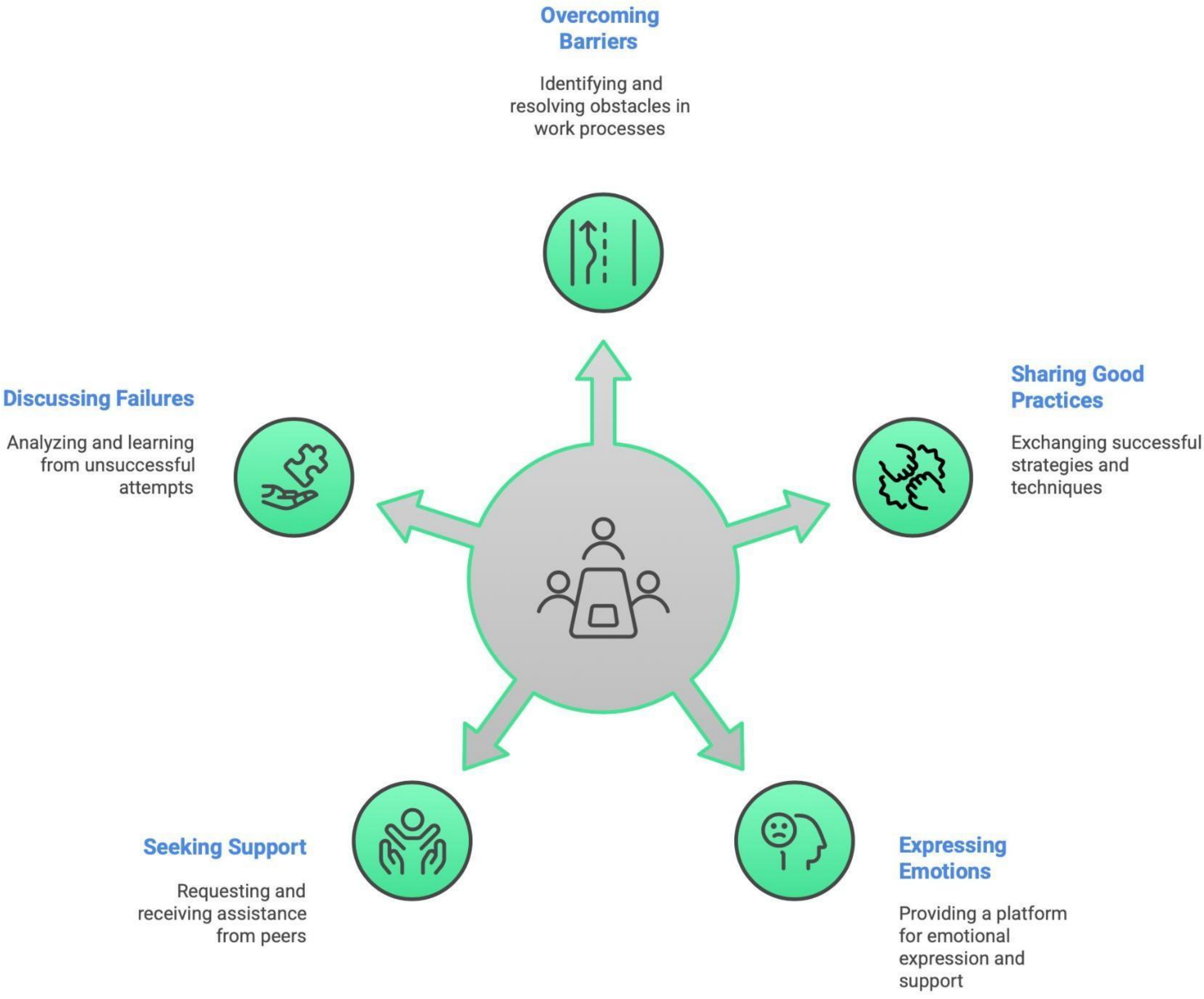
- **Individual reflections (Round 1)**
  After check-in, we continue around the group. Each person has the chance to bring *one* work-related issue that is on their mind. This could be something that isn't going well, a frustration, a barrier they're facing, or something they simply want support to think through. While the person is speaking, the rest of the room remains silent and listens fully.

- **Group feedback**
  Once the person has shared, we move around the room again. Each member of the group has the opportunity to offer feedback, insights, suggestions, or guidance. This ensures every voice is heard and that support comes from the collective, not just the facilitator.

- **Repeat the process**
  We repeat this pattern for each person in the group, one by one sharing their reflection, followed by a round of feedback from the team.

- **Check-out**
  To close the session, we complete a check-out. Again, we go around the room and each person briefly shares how they are feeling now that supervision is complete. This helps to ground the group, acknowledge any emotional shifts, and end the session with clarity and connection.

Group Supervision



Team Commitments for Group Supervision

The team worked together on a set of rules that they all agreed on to ensure that group supervision served 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).

- **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.

- **Text or call manager/buddy when you start the lone/OOH work.**
- **Text or call manager/buddy when you finish.**
- **If any plans change (time or location) update the manager/buddy as soon as possible.**
- **If you find yourself in an unsafe situation, ring for assistance.**
- **If you feel unsafe but don't feel safe to say please use the agreed 'code phrase' to alert the responder. 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?

- **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.**
- **If we have not heard from you at the agreed finish time, then the manager/buddy will attempt to ring you.**
- **If there is no answer after 3 attempts, we will try your personal number.**
- **If there is no answer on your personal number, we will contact the police.**

To support this process please ensure:

- Your work and personal phones are charged at all times.
- Your personal contact details are up to date.
- You notify us of any changes to the agreed plan in a timely manner.
- 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.
- 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 caseload 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 case load 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 caseload. • 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.

PART FIVE:

AI Prompts

AI Prompts for using the support sequence

These prompts should be used in line with the OSS step by step process and the guidance for using AI to Co-Produce Person-Centred Outcomes in Education, Health and Social Care.

The prompts to use are written in blue in bold italics, they can be copied and pasted into an AI chat. There is additional information to consider captured in brackets. Based on the results you receive you should consider the information that may improve the results that are generated.

Prompt for creating an outcome (clarifying purpose)

You are an experienced and creative social care and health practitioner skilled in writing outcomes that are specific, measurable, achievable within 6 months, and written in everyday language. Do not embed solutions in the outcome.

The person is between x and x years old. The person wants to (broad goal area or the change the person wants to make)...(If the goal needs to reflect an assessed need, put that in too)...

Additional information to consider adding to your prompt:

In developing the outcome also take into account the following considerations…

(if there are any).

Additional information to consider once the outcome has been created based on what you know is not working for the person and what matters to them about the change they want to make:

Now adjust the outcome to focus more on…

[e.g. relationships / health / independence / managing daily life]

Now adjust the outcome to make it more…

[e.g. measurable / strengths-based / motivating / specific]

Prompt for generating potential solutions / ideas to achieve the outcome (purpose) using the support sequence.

Generate a range of practical solutions that support the person to achieve the outcome. For each category below, offer tailored suggestions, including approximate cost (if applicable):

- ***What can the person do or learn that would help them move towards or achieve their outcome?***
- ***What technology (including apps) could help the person move towards or achieve their outcome? The person already uses…*** (add if appropriate)
- ***Are there any home adaptations or equipment that could help the person achieve their outcome?***
- ***What Direct Support from Team Members*** (the team supporting the person) ***can help support the outcome?***
- ***What is happening locally (within 5 miles of*** (insert local area) ***that could support the outcome? Include in-person and online groups or community resources.***
- ***What services from the NHS, charities, local authority or community organisations could help?***
- ***Are there any paid services or support that could help the person move towards their outcome?***
- ***What could the person spend money on to help achieve their outcome? Provide options for when the person has a budget of up to £200, a budget of up to £300 and a budget of up to £500.***

Prompt for prioritising and ranking the ideas generated

Evaluate and rank the suggestions

- ***What is the approximate cost of each suggestion?***

- ***Could any suggestion make what is not working worse or more likely to happen?***
  (Include here anything relevant)

- ***Rank the suggestions based on how likely they are to significantly support the person in achieving their outcome.***

- ***Are there any other considerations the person should keep in mind when choosing which option(s) to pursue.***

Prompt for generating a 6 month progress plan

Develop a 6 month progress plan for the person to move towards the purpose(s).

Informal network meeting invite email

Subject: [Client's Name] – Network Meeting Invitation

Hi everyone,

We're pulling together a **Network Meeting** for **[Client's Full Name]** to make sure everyone involved in their support is connected and up to date. It's a chance to share updates, identify any gaps or overlaps, and look at how Changing Futures can best support both [Client's First Name] and the wider network.

The meeting will be chaired by **[Staff Member's Name]**, and we'll circulate notes afterwards so nothing is missed.

Details:
Date: [Insert date]
Time: [Insert time]
Location / Teams link: [Insert location or link]

Please just drop me a quick reply to confirm if you can make it, or if not, feel free to send over any updates you'd like included in the notes.

Thanks everyone, these sessions have been really useful for bringing things together and keeping the focus on what matters most to [Client's First Name].

Regards,
[Your Name]
Changing Futures Northumbria

Invite to network meeting - email to professionals

Subject: Invitation to [Citizen's Name]'s Network Meeting - [Date]
Dear all,
You're invited to attend a **Network Meeting** for **[Citizen's Full Name]**, facilitated by Changing Futures Northumbria.
The purpose of this meeting is to bring together everyone currently involved in [Citizen's First Name]'s care and support. It's an opportunity to:

- Share information and updates to ensure good communication between services
- Explore how Changing Futures can best support both [Citizen's First Name] and the wider network
- Identify any gaps, overlaps or barriers in support
- Agree practical next steps that are aligned with what matters most to [Citizen's First Name]

Our aim is to make things simpler and more joined-up, avoiding duplication, missed appointments or conflicting approaches. We know how complex and changeable situations can be, so this meeting is a chance to make sure we're all working together.
The meeting will be chaired by **[Staff Member's Name]**, [Job Title], and notes will be taken and shared afterwards for everyone's reference.
Details:
Date: [Insert date]
Time: [Insert time]
Location / Teams link: [Insert location or link]
Please could you confirm your attendance by replying to this email? If you're unable to attend, we'd still welcome a brief update that can be shared in the meeting notes.
Thank you for your time and continued support. These meetings have proved really valuable in improving communication and outcomes for the people we work with, and we appreciate your input.
Regards,
[Your Name]
[Job Title]
Changing Futures Northumbria
[Email address] | [Phone number]

Changing Futures Northumbria Network Meeting - Agenda

Date:

AGENDA		
1.	**Present**	
2.	**Apologies**	
3.	**Welcome and Introductions** ● Welcome everyone and explain the purpose of the meeting: to bring everyone together to support the person in the best possible way. ● Quick introductions - name, role, and how you're involved. ● Confirm that the person is comfortable with who's in the room and what will be shared.	
4.	**Setting the scene** ● Give a short overview of how Changing Futures is involved and why the meeting has been arranged. ● Agree what we'd like to get out of today's discussion.	
5.	**What matters to the person** ● An opportunity for the person to share what's important to them right now, goals, worries, hopes, or what's been helping/not helping. CFN can advocate at this point if they're not comfortable. ● Professionals listen, ask clarifying questions, and reflect back understanding.	

6.	**Services Update** ● **Each service gives a short update on their current involvement and any key plans.** ● **Keep it plain language and accessible so the person can follow and contribute.**	
7.	**Identifying opportunities to work together** ● Where can we streamline or better coordinate? ● Are there any overlaps or gaps in support? ● What can Changing Futures do to complement existing work?	
8.	**Agree next steps and actions** ● Summarise agreed actions, who is doing what, and by when. ● Confirm if a follow-up meeting is needed and timescales.	
9.	**Closing reflections/Any other business** ● Quick check-in from attendees ● what's been most useful today? ● Any immediate follow-up or communication needed? ● Any other business	
	DATE OF NEXT MEETING	

Changing Futures Northumbria Network Meeting - Agenda

Date:

AGENDA		
1.	**Present**	
2.	**Apologies**	
3.	**Welcome and Introductions** ● Quick round of introductions — name, role, organisation, and how you're involved with Citizen. ● Reminder of the meeting's purpose: to coordinate support, avoid duplication, and keep the focus on what matters most to Citizen	
4.	**Overview from Changing Futures** ● Summary of current involvement ● Key Priorities/challenges so far	
5.	**Professional updates** ● Each service provides a short update on current involvement, progress, and any key issues. ● Highlight any upcoming appointments, assessments, or risks to engagement.	

6.	**Hearing the person's priorities** ● **What matters most to the person right now?** ● **What support feels most helpful or least helpful from their perspective?**	
7.	**Identifying opportunities to work together** ● Where can we streamline or better coordinate? ● Are there any overlaps or gaps in support? ● What can Changing Futures do to complement existing work?	
8.	**Agree next steps and actions** ● Summarise agreed actions, who is doing what, and by when. ● Confirm if a follow-up meeting is needed and timescales.	
9.	**Closing reflections/Any other business** ● Quick check-in from attendees ● what's been most useful today? ● Any immediate follow-up or communication needed? ● Any other business	
	DATE OF NEXT MEETING	