Child and Adult Practice Reviews

A Guide for Panel Members

Introduction

The importance of learning, developing and moving forward as a Safeguarding Board is emphasised within the *Working Together to Safeguard People: Volume 1 – Guidance on the functions of Safeguarding Boards, (Social Services and Well Being Act, 2014*) It states that a "Board **must** establish child and adult practice reviews where they meet the criteria in regulations…and ensure that they are effectively managed, supported and resourced."

The following is a step-by-step guide for panel members involved in child and adult practice reviews, as commissioned by Safeguarding Boards, and aims to assist prospective panel members in understanding their role within this process.

Section 1: Role and responsibilities

According to the *Working Together to Safeguard People: Volume 1 – Guidance on the functions of Safeguarding Boards, (Social Services and Well Being Act, 2014*), "the review panel manages the review process and plays a key role in ensuring that learning is drawn from the case." This guidance indicates that panel members should:

- be appointed from those agencies involved in the case;

- have working knowledge of the services but not have had direct involvement in the case;

- form a multi-agency panel, even where the case may involve only a single agency or small number of agencies; and,

- consistently attend panel meetings, with deputies only permitted in exceptional circumstances.

As part of a review panel, members will be required to attend a series of meetings with the panel chair, dedicated reviewer(s[1]) and other agency panel members in order to review the case as a group. There are several stages involved in the review panel process which will form the basis of this guide.

Panel member responsibilities include:

- analysing case practice against, both, agency policies and expected practices;
- contributing to panel discussions and decision-making about case learning;
- agreeing what can be identified as effective practice and where improvements could be made;
- nominating own agency staff to attend learning events;
- approaching nominated (own agency) staff directly to explain the purpose of the learning event and to ensure that prospective participants understand how to prepare for this event;
- sharing case learning with learning event attendees, own agency senior leads and all represented parties;

Therefore, review panel members should ensure that they have the required authority, and practice knowledge with which to represent their agency within this process.

Annex A contains the role profile for review panel members which are to be signed by individuals at the first panel meeting. Copies will be retained by the Regional Safeguarding Business Unit (RSBU).

[1] Extended reviews require two reviewers. In some circumstances, another person may be appointed to work with the reviewer of a concise review.

Section 2: First Review Panel Meeting – Preparing and Planning

Once the reviewer has been identified and commissioned then a meeting with the review panel should be arranged to discuss and plan the next steps. The review panel members should:

- review the terms of reference and make any adjustments, if necessary; (see *annex 2, Working Together to Safeguard People: Volume 2 and Volume 3 – Child Practice Reviews and Adult Practice Reviews, Social Services and Well Being Act, 2014*)

- consider parallel reviews of practice (for example, Domestic Homicide Reviews, Independent Police Complaints Commission or Coroner's Inquest) and where there are opportunities for coordinating with those other involved bodies;

- make decisions about timelines, brief agency analyses and genogram – which agencies / services and the deadline for completion;

- consider family member contact; and,

- consider the learning event – possible participants, date, venue and duration.

Section 3: Timeline, Brief Agency Analyses and Genogram preparation

Timeline

Agencies who have been involved with the case will be requested by the review panel to provide information of contact with the family by preparing an agency timeline of significant events together with a brief analysis of relevant context, issues or events. The timeline is a spreadsheet containing a small number of columns which are to be populated using individual agency records. The timeline requires the author to input information identifying their agency, the date / time of each significant event, the subject of the event (for example, A&E visit or GP appointment) and a brief description of the event. Information about action already taken or recommendations by staff for future improvements in systems or practice may be included, if appropriate. A timeline of a maximum of 12 months preceding the incident should be prepared. The 12 month timeline may be extended only if there are exceptional circumstances.

Brief Agency Analyses

Where there is significant background information or a previous incident, this can be included in the brief agency analysis report which accompanies the timeline. Family history is vitally important but the critical issue in a review is who was familiar with the family history, how it was shared within the professional network and how it was taken into account in current decision making. Therefore, review panel members can be reassured that all critical historical information sitting outside of the timeline scope will be captured within this report.

Genogram

A full and accurate genogram (also referred to as a family tree) should also be prepared by the review panel as a means of clarification of family relationships. It should be used during review panel discussions with the reviewer and be available for reference at all stages of the review process, although not included in the published report.

Who will complete these tasks?

The individual panel members will complete their own agency timeline and brief analyses. The Regional Safeguarding Business Unit will produce a merged, multi-agency timeline of significant events from the individual agencies' timelines. The genogram can be completed by the most appropriate panel member agency and other panel members can ensure that this reflects their records at the next available meeting.

The merged timeline, genogram and brief agency analyses will then be used by the review panel members to develop questions and ideas about what happened. This initial understanding will inform the preparation of a learning event for practitioners and line managers to test out and further explore operational practice issues. (*Working*

Together to Safeguard People: Volume 2 and Volume 3 – Child Practice Reviews and Adult Practice Reviews, Social Services and Well Being Act, 2014)

Wherever possible, it is recommended that the preparation of timelines and brief agency analyses should be undertaken by panel members, rather than delegating it within their agency, to ensure that he / she can apply their understanding of the case to their review of agency-specific records. This will be more likely to promote the following preferred outcomes:

- gathering relevant 'significant events' in relation to the terms of reference;
- avoiding the pitfall of developing a chronology (including every known event, under previous Serious Case Review arrangements);
- ensuring that important detail is not missed;
- applying some level of initial brief analysis in light of usual agency practice and in anticipation of further discussion at the next panel meeting.

Section 4: Second (and subsequent) Review Panel Meeting – Clarifying and Confirming

The next step for review panel members is to meet again to:

- clarify and fill in gaps in the timelines and analyses as far as possible. Panel members may be required to provide further information as a result;
- identify issues and hypotheses to be tested out at the learning event;
- confirm who should attend the learning event as well as the date, venue, duration; and,
- confirm if and how family members are to be approached to contribute to the review.

The review panel may feel that more than one meeting is required to undertake the above tasks.

Section 5: The Learning Event – Supporting and Preparing Participants

The purpose of the learning event is to bring together key staff to reflect and learn from what has happened in order to improve practice in the future. The learning event will use retrospective reflection to understand what happened, consider why some assessments and decisions were made and how and what can be learned for the future. Participants can be invited to 'tell the story' of their involvement with the situation, specifying what they did and when this happened.

Panel members have a critical role to play in helping participants prepare for the learning event. Such preparation should be facilitated by face to face meetings between the appropriate panel member and practitioner. It is also helpful if participants are given a structure around which to prepare as they will need to revisit their contact with the case. Review panel members should ensure that prospective participants are familiar with their agency timeline for the case prior to the learning event. It is also suggested that prospective participants think about their involvement in terms of:

- assessments;
- decision making;
- actions;
- interaction with other professionals and services;
- areas of effective practice; and,
- areas where there could be some improvements.

A leaflet for learning event practitioners is available upon request from the Regional Safeguarding Business Unit on 01443 864 670 or sewscbadmin@caerphilly.gov.uk

Section 6: Post Learning Event Panel Meeting – Consolidation of Learning

After the learning event, the reviewer will collate and analyse the information gathered and prepare a draft report using the agreed template contained in Annex 2 of the previously mentioned statutory guidance. Review panel members may be asked to consider this draft report electronically in advance of the next panel meeting in order to facilitate the discussion as a group.

The review panel will meet again in order to:

- revisit the original hypotheses formulated by the panel and consider whether they were covered within the learning event;

- review and agree the draft practice review report; and,

- agree the draft action plan.

The review panel may feel that more than one meeting is required to undertake the above tasks.

Section 7: Presentation to Case Review Group and Safeguarding Board

The reviewer will present the draft report and action plan to the Case Review Group and then to the respective South East Wales Safeguarding Children Board or Gwent-wide Adult Safeguarding Board (depending upon the case). The presentation will take members through the timeline so that they understand the story and emerging learning. It will also include a brief description of the learning event itself in terms of participants, process and impact.

Panel members should ensure that their agency representative / lead who attends the Case Review Group or the Safeguarding Board are advised about learning outcomes or suggested actions from the review process prior to the presentations taking place.

Section 8: Debrief – Sharing the Learning

Once the case review report and action plan have been approved by the Safeguarding Board and a publication date agreed, there should be a process of debrief for all involved. This may require a further panel review meeting to discuss feedback / debrief. This final meeting should provide review panel members with the opportunity to debrief and reflect on the overall review process. The following parties should be considered as part of the debrief process:

- family members;
- learning event participants;
- agency leads (for all agencies represented within the review process)

Review panel members should take responsibility for providing feedback to learning event participants and leads within their agency or service area. This should include information about effective practice; any improvements to be made and how this will happen; and how the learning is being shared with wider audiences.

Annex A – ROLE PROFILE – CPR/APR PANEL MEMBERS

ORGANISATIONAL RESPONSIBILITIES

- Not have had direct involvement in the case under review.
- Prepare for, attend and stay at all Panel meetings. In the event of this not being possible identify another practitioner to deputise.
- Contribute and commit to all deadlines scheduled in review.
- Provide all information in accordance with deadlines.
- Be accountable for agency information.
- Submit timeline information on the required template to the Regional Safeguarding Business Unit for collation.
- Be responsible for the development and content of their agency timeline.
- Where panel members are not authors of their agency timeline, Panel Members must ensure timeline authors are independent. Panel members must also have full knowledge of timeline content.
- Include any historical or additional information, which lies outside of timeline scope, in a brief agency analyses report.
- Identify relevant Learning Event attendees within their agency.
- Provide support, advice and mentoring to identified staff throughout the learning event process.
- Work through own agencies timeline with Learning Event attendees in preparation for Learning Event.
- Actively contribute to the scrutiny of draft report including recommendations.
- Be responsible for agreeing final drafts for submission to the Case Review Group
- Keep Learning Event attendees informed of progress of review in particular plans and dates of publication

Name ____

Designation/Agency ____

Signature ____