



FIRST CONTACT CLINICAL
ENABLING HEALTHY CHANGE



From Playbook to Practice

A companion guide to help teams and services create, test and adapt their own version of relational, purpose-led practice.

From Playbook to Practice is a companion guide to help teams and services create, test and adapt their own version of relational, purpose-led practice.

It sits alongside the Changing Futures Northumbria open-source playbook and is designed to help readers understand:

- what CFN was trying to achieve
- what is specific to CFN's context
- what is transferable into other services and systems
- what conditions need to be in place
- how to begin shaping a local version 1

This guide is primarily for:

- organisational leaders
- operational managers
- service leads
- team leads
- practice leads
- commissioners, policy makers and funders interested in the conditions needed for relational practice

The guide is not a manual for copying CFN's model. It is a practical resource to help you interpret the learning behind the playbook and ask what it might mean in your own context.

The main message running through the guide is simple: 'keep the person and what matters to them at the centre, start with what is possible, and expect your first version to change as you learn'.



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Glossary / language note

Relational practice: A way of working that treats the relationship itself as an important part of what helps change happen. It focuses on trust, authenticity, consistency, and purposeful support.

Purpose-led support: Support that is organised around an agreed purpose based on what matters to the person, rather than around service routines alone.

What matters to the person: The person's own priorities, concerns, hopes or goals, expressed in language that makes sense to them.

Agreed purpose: A clear, shared understanding of what the work is for. This helps define the scope of support, guide decisions, and review progress.

Bounded autonomy: Giving staff permission to use judgement and make decisions in the work, within clear rules, principles, and boundaries.

Lived experience roles: Roles held by people whose own experiences help them bring insight, authenticity, challenge and hope into the work.

Reflective learning: Structured opportunities to consider what is happening in practice, what is being noticed or assumed, and what may need to change.

Learning review: A structured reflective conversation designed to help teams notice patterns, challenge assumptions, and improve both practice and process.

Network meeting: A meeting that brings together the people around a person to build shared understanding of what matters and what each person can do. In CFN's model this is distinct from a traditional MDT.

Confirmation practice: A reflective process used in one-to-ones to help staff consider how they are living out their role, identify where they are struggling and agree a goal for development.

Psychological safety: A team condition in which people feel able to speak honestly, ask for help, raise concerns, and reflect openly without fear of blame or ridicule.

Version 1: Your first local attempt to translate the learning into practice. It is not expected to be final and should evolve through use, reflection, and adaptation.



Foreword

This guide has been developed as a companion to the **Changing Futures Northumbria open-source playbook**.

It is not a manual for copying someone else's model. It is a practical guide to help you create, test and adapt your own version of relational, purpose-led practice in a way that fits your service, team or organisation.

Changing Futures Northumbria spent four years learning in practice. Their playbook is one product of that journey, but not its final answer. It is a live document, shaped by trial, reflection, challenge and adaptation. Their strongest message is not "do it like this." It is **start somewhere, stay curious, keep learning, and expect your first version to change**.

That matters, because many people are drawn to the idea of relational working without always knowing what it means in practice or what it takes to make it real. It can be easy to admire the language of person-centred, relational or strengths-based practice, while still working within structures that pull teams back towards transactional, compliance-led delivery. This guide is intended to help bridge that gap.

The approach described here begins with a simple but demanding question: **what matters to the person?** From there, it asks what permissions, resources, relationships and structures are needed to work in a way that keeps that purpose in view. It also asks what you can realistically do now, in your own context, with the conditions you already have.

This guide is therefore not about lifting and implementing the CFN playbook as if it were a finished product. It is about using the learning behind it to shape your own **version 1**: something that reflects your context, your constraints, your operating principles and your capacity to learn.

As you read, you are invited to treat the playbook as something you can pull apart and put back together. Some aspects may feel immediately relevant. Others may need translating. Some may not fit at all. That is not failure. It is part of the work.

The challenge is not to reproduce the model exactly. The challenge is to create the conditions in which your own practice can become more relational, more purposeful, and more open to learning over time.

About this guide

This guide is intended to sit alongside the **Changing Futures Northumbria open-source playbook**. It helps commissioners, organisations, leaders and delivery teams understand the thinking, rationale and implementation considerations behind each section, so they can adapt the learning in their own context.



Throughout the guide, the focus is on two linked questions:

1. What was CFN trying to achieve through this part of the playbook?
2. What might this mean for your own team, service or organisation?

Each chapter separates what is **specific to CFN** from what is **transferable elsewhere**. That distinction matters. CFN was a funded system change and learning programme. Many services operating within everyday system conditions will not have the same permissions, resource, time or flexibility. This guide does not ignore that reality. Instead, it asks what can still be learned and what might still be possible.

In places the guide will refer to further resources available from the CFN website:

<https://www.changingfuturesnorthumbria.co.uk/> .

The guide has been written in plain English and is intended to support practical reflection, discussion and local adaptation. It is best used as a tandem read with the playbook itself, allowing you to make notes, test ideas, and begin shaping your own local version.

Who this guide is for

This guide is primarily for **leaders** who want to explore whether and how a more relational, purpose-led way of working could be developed in their own context.

This may include:

- organisational leaders
- operational managers
- service leads
- team leads
- practice leads
- policy makers
- commissioners
- funders or decision makers interested in how service design supports relational practice

Some readers will be close to practice. Others will be responsible for creating the conditions in which practice happens. Both perspectives matter.

For frontline practitioners, the guide may also offer useful language and structure for reflection. For commissioners and policy makers, it can help surface the conditions that make relational, person-centred work more or less possible in practice.

What this guide assumes

This guide assumes that relational, purpose-led practice is not created through training alone. It requires attention to culture, supervision, autonomy, reflective learning, leadership and service design.



It also assumes that:

- the person must remain at the centre of the work
- agreed purpose matters more than service routines
- autonomy needs boundaries
- learning needs structure
- change is iterative
- not every part of this approach will transfer directly into every service

Some organisations will already have strong foundations for this way of working. Others may need to start smaller. In many cases, the most useful question is not “how do we implement the whole model?” but **“what can we do on Monday, with the permissions and resources we already have, that moves us in this direction?”**

What decision makers may need to consider

Although a separate commissioner-facing document may be useful, some readers will still need to think about how this way of working shows up in service design, operational expectations and specification.

Relational, purpose-led work can be undermined when teams are asked to work differently but are still measured, timed or commissioned in ways that pull them back towards transactional practice. If you want different behaviours, you need conditions, expectations and structures that support them.

This includes thinking about:

- caseloads and intensity
- flexibility in how support is delivered
- the role of lived experience
- reflective spaces such as supervision and learning review
- network coordination around the person
- outcomes that reflect progress around what matters to the person, not just service activity

The key issue is alignment. Person-centred language on its own is not enough if the surrounding system still rewards speed, volume and compliance over purpose, reflection and responsiveness.

What conditions need to be in place

CFN is clear that services living inside the system do not necessarily have the same conditions they had. That is why this guide asks you to think about permissions and resources, not simply aspiration.



Relational, autonomous and learning-led practice is more likely to take root where there is:

- leadership sponsorship and curiosity
- agreement that person-centred, purpose-led work matters
- bounded autonomy rather than rigid control
- reflective structures such as supervision, learning review and team development
- honest attention to recruitment, selection and workforce fit
- clarity about what permissions already exist and where boundaries sit

It is also important to recognise that this way of working is not for everyone. Some staff thrive with autonomy and flexibility. Others prefer the safety and clarity of more structured systems. Neither is inherently wrong, but workforce fit matters.

If you are thinking about implementation, it is often best to start small. Identify early adopters. Learn what feels energising and what feels stressful. Build around real conditions rather than idealised ones. Keep asking what you can do now, and what may need wider agreement later.

What CFN most wants you to take away

Changing Futures Northumbria's strongest message is not "copy us." It is '**start somewhere, stay curious, keep learning, and expect your first version to change**'.

The playbook was developed through four years of practice, challenge and purposeful learning. It was not written as a finished manual for other services to lift and implement. It was written as an open-source resource to help others create their own starting point.

CFN wants readers to understand that their real legacy is not a fixed model. It is the learning they gathered through doing the work, noticing what happened, changing their assumptions, and adapting their approach over time.

That means:

- your first version does not need to be perfect
- every part of your local model can be open to learning
- what matters is not copying the form, but understanding the purpose
- the person must stay at the centre of the work
- agreed purpose must stay in view
- the best place to begin is with the permissions and resources you already have

CFN is also clear that they were working in conditions that many teams and services may not have. They had time, funding and explicit permission to learn about system change. Other services may need to move more slowly, begin on a smaller scale, or adapt the ideas more carefully to fit local realities.



That does not mean the learning is not relevant. It means the question is different.

The question is not: 'How do we reproduce this model exactly?'

The question is: 'What can we take from this learning, and what can we begin to do in our own context?'

Starting your version 1

If you are ready to begin, start small and stay purposeful.

A useful starting point is to ask:

- **'What problem are we trying to solve?':** Be clear about the group of people, the experience, or the system tension you want to respond to.
- **'What matters most in our context?':** What do we want to preserve from the learning behind the playbook, even if the local form looks different?
- **'What permissions do we already have?':** What could we begin doing now without waiting for a full redesign?
- **'What resources do we already have?':** What people, skills, relationships, spaces or tools could support a first test of change?
- **'What will version 1 include?':** What rules, principles, structures or ways of working do we want to test first?
- **'How will we learn?':** What reflective spaces, review points or conversations will help us notice what is working, what is drifting and what needs to change?

Version 1 is not the end point. It is the beginning of a local learning journey.

The aim is not to build something perfect on paper. The aim is to begin in a way that is thoughtful, realistic and grounded in what matters to the person, then keep adapting as you learn.



Chapter 1. How to use this guide

You may find it helpful to read this guide in tandem with the playbook, chapter by chapter.

Each chapter includes reflection questions and a brief implementation exercise. These are there to help you move from interest to action.

The aim is not to produce a perfect replica. The aim is to help you take the next meaningful step towards a more relational, purposeful and learning-led way of working.

Reflection questions

As you go, ask yourself:

- What is CFN trying to achieve here?
- What assumptions sit behind this section?
- What is specific to their context?
- What is transferable into ours?
- What permissions, structures or resources do we have / would we need?
- What could we start doing now?
- What would version 1 look like for us?

Brief implementation exercise

Create a simple page headed 'What can we do on Monday?'. Divide it into two columns: 'Permissions we already have' and 'Resources we already have'. As you read the playbook and this guide together, note down practical things your service could begin without major redesign. Then write one sentence describing what a local version 1 might need to help your team learn and adapt over time.

Chapter 2. What is unique to CFN and what is transferable

As you read this guide and the CFN playbook, it is important to remember that the playbook was developed within a specific programme, with particular funding, freedoms and responsibilities. Some parts of it are therefore unique to CFN's context, tools and ways of working.

What is transferable is not the exact form of the model, but the thinking behind it: keeping the person and what matters to them at the centre, agreeing purpose clearly, giving workers bounded autonomy, and treating learning as part of the work.

The invitation is not to copy CFN's model exactly. It is to notice what each part of the playbook is trying to achieve and ask what that might look like in your own context. Start with function, not form. Use the playbook as a prompt to shape your own version 1, then expect it to change as you learn.



Reflection questions

- Which parts of the playbook feel clearly local to CFN?
- Which parts describe a function your own service also needs to achieve?
- What can you adapt now, and what would need wider permission or resources?
- Where might your team be tempted to copy rather than learn?

Brief implementation exercise

Choose three features from the playbook. For each one, write down: what it is called in CFN, what function it performs, whether you already do something similar, and what your local version 1 could look like.

Chapter 3. Introduction

Introduction to the chapter

This chapter introduces the overall model behind the CFN playbook and, importantly, the mindset that sits underneath it. CFN's model did not emerge fully formed. It developed over time through practice, challenge and learning. The playbook therefore describes a way of working that has been shaped in use, not designed perfectly in advance.

What this section is trying to achieve

This section helps you understand the central aim of the model and the practical logic that holds it together. At its core, CFN is trying to organise support around what matters to the person, while giving workers enough permission and structure to respond relationally and purposefully in complex situations. It is also trying to create conditions in which learning from the work can improve the work.

Why it matters

Many people with complex lives come into contact with services repeatedly without experiencing joined-up progress. Support can become fragmented, reactive or driven more by service process than by what matters to the person. CFN's model matters because it tries to respond differently. It places the person in the middle and treats agreed purpose as the anchor for action, judgement and review.

This matters not only for outcomes, but for how support feels. CFN's experience suggests that people can often say quite clearly what matters to them now. If services start there, rather than with organisational assumptions, there is a better chance of building trust, making support meaningful and avoiding action that looks caring but is not contributing to change.



Theory and evidence behind it

A few named ideas help explain this model. Relational practice treats the relationship itself as an important part of what helps change happen. Person-centred practice keeps the person's own priorities and experience in view. Strengths-based practice looks for assets, capacities and hope, not only problems. These ideas help explain why CFN keeps returning to what matters to the person and why support is shaped with them rather than done to them.

There is also a useful connection to self-determination theory, associated with Deci and Ryan, which highlights the importance of autonomy, competence and relatedness. In plain terms, people are more likely to engage when they feel some ownership, when progress feels possible, and when relationships feel genuine. Similar ideas apply to workers. If you want staff to work with judgement and authenticity, they need enough trust, structure and support to do that well.

CFN's use of lived experience roles also connects to these ideas. In their view, lived experience strengthens rapport, authenticity, challenge and visible hope. It can help a team better understand what services feel like from the receiving end and, in some situations, make it easier to challenge supportively because the person can see that change is possible.

What is CFN-specific

Some parts of this model are closely tied to CFN's context. It was developed within a funded programme focused on adults experiencing multiple disadvantage. It includes lived experience roles as a visible and intentional part of the team design. It also grew out of a particular set of learning conditions in which the team could test, change and refine the way it worked over several years.

CFN also began with a strong emphasis on the Liberated Method, although their own reflection is that this became less fundamental over time than the wider discipline of agreeing purpose, staying within permissions and learning from practice. That evolution matters because it shows the model did not stand still.

What is transferable

What is transferable is not a fixed package. It is the basic discipline of placing the person in the middle, agreeing purpose clearly, working within clear permissions, and allowing staff enough bounded autonomy to respond to what matters. It is also transferable to ask how your own team can learn and adapt, rather than assuming your first design will be right.

Another transferable message is that this way of working is not for everyone. Some staff thrive with autonomy, judgement and ambiguity. Others prefer the safety of a more prescribed system. CFN's learning is that this needs to be understood honestly, including at recruitment and selection stage. Starting with early adopters and learning from them may be a more realistic route than expecting everyone to work this way immediately.



What conditions need to be in place

If you are considering a similar way of working, some conditions matter early. First, there needs to be clarity that agreed purpose is non-negotiable. CFN's own learning was that purpose had to be made more explicit over time because otherwise good intentions could drift into activity without direction. Second, staff need clear permissions and boundaries so that autonomy is usable rather than overwhelming.

Third, there needs to be leadership understanding that this work can feel stressful as well as energising. Autonomous practice asks more of workers than simply following a pathway. Leaders need to think about recruitment, induction, reflective support and the pace at which a team can safely learn. Starting small, with people who are open to this way of working, may create better conditions than trying to impose it across a whole service at once.

How to implement or adapt it elsewhere

Start by asking what is most central to your version of the model. CFN would strongly suggest beginning with purpose: how will you help workers and the people they support agree what matters and keep it in sight? From there, think about permissions. What decisions can staff make in the work? What boundaries will hold those decisions safely? What would they need to escalate or check?

It is also worth looking honestly at workforce fit. Do not assume everyone will feel comfortable with autonomy. Consider whether you need to begin with a smaller group, a pilot, or a team that is already showing interest in relational and adaptive ways of working. Build your version around what you can support well, not just what sounds attractive in principle.

Common risks or misunderstandings

One risk is treating the model as open-ended support without enough focus. CFN's own learning shows why this matters. Early formulations such as 'it takes time' could be read as unlimited support with unclear outcomes. Over time, the wording shifted to 'it takes the time it takes' to make clearer that time is justified only where it is still contributing to the agreed purpose.

Another risk is assuming that rules and principles alone are enough. CFN found that three rules and five principles still needed further structure if workers were going to hold purpose in view in day-to-day practice. A further misunderstanding is assuming that because a worker cares deeply, the work will automatically stay purposeful. In reality, empathy without enough structure can still drift.



Reflection questions

- What would it mean in practice for your service to place the person and what matters to them at the centre?
- How clearly do your current processes help staff agree and hold purpose over time?
- What permissions do staff currently have, and where are they unclear or inconsistent?
- How ready is your workforce for bounded autonomy and adaptive practice?
- Where will lived experience, authenticity or visible hope strengthen your own approach?

Brief implementation exercise

Write a short statement beginning, 'In our service, agreed purpose would mean...'. Then list three decisions staff currently make that are unclear, overly restricted or dependent on unnecessary permission. Discuss which of these could safely be clarified or delegated if you wanted staff to work in a more purposeful and relational way.

Resources

Read more at <https://www.changingfuturesnorthumbria.co.uk/>, and listen to podcast 3.

Chapter 4. The work – Our Mission and Method

Introduction to the chapter

Before the playbook became a document, it was a way of noticing and learning. CFN started with a theory-based approach and an outline plan, but what they most want people to take away is how much the model changed once purposeful learning became part of the work.

What this section is trying to achieve

This chapter explains the overall philosophy that sits behind the playbook. It invites you to read the whole guide with a growth mindset. The expectation is not that you will get it right first time. The expectation is that you will learn, challenge your own beliefs and keep reshaping your approach.

Why it matters

Teams can become stuck when they assume that a stronger policy, better script or clearer process is the answer to every problem. CFN's experience suggests something different: learning changes practice. Their biggest message is that where you start is not where you will end, if you are willing to notice, reflect and adapt.



Theory and evidence behind it

This chapter draws lightly on Kolb's experiential learning cycle and on plan-do-study-act thinking from quality improvement. Both approaches treat practice as something to test and refine rather than perfect in theory before you begin. It also links to Carol Dweck's work on growth mindset: progress depends on being open to change, not defending your first design at all costs.

What is CFN-specific

CFN had an explicit brief to learn about system change over four years. That gave permission to question their own assumptions and alter processes that were not serving the work. Not every service has that same mandate or timescale.

What is transferable

The transferable message is that every part of your local model should be open to learning. That does not mean constant instability. It means being willing to change your structures, processes and even your language when practice shows you they are no longer helping.

What conditions need to be in place

You need leadership that values learning as part of delivery. You need ways of gathering insight from practice. You need a culture where changing your mind is a sign of seriousness, not weakness. And you need enough humility to accept that a first version is only a start.

How to implement or adapt it elsewhere

Treat your own playbook or practice framework as something you can pull apart and put back together. Be explicit about what is provisional. Create routines for noticing where support drifts, where assumptions go untested and where workers need more guidance. Then update your version rather than waiting for a perfect redesign.

Common risks or misunderstandings

- Confusing a growth mindset with a lack of standards.
- Assuming learning only happens in formal reviews.
- Treating early frustration as proof the approach does not work.
- Waiting for ideal conditions before trying anything.

Reflection questions

- How open is your service to changing processes that no longer help?
- What would make it easier for staff to challenge assumptions safely?
- Where do you already learn from practice, and where is learning mostly accidental?
- What would version 1 of your own playbook need to leave open on purpose?



Brief implementation exercise

Write down one belief your service currently holds about good support. Then ask: what evidence from practice backs this up, what might challenge it, and what would we do if we learned that belief was only partly true?

Resources

Read more at <https://www.changingfuturesnorthumbria.co.uk/>, and listen to podcast 1.

Chapter 5. The Liberated Method

Introduction to the chapter

The Liberated Method was an important starting point for CFN. Over time, CFN's relationship with it changed. They still see the rules and principles as important, but their own reflection is that the method became less central as the work matured, purpose became the anchor, and the appreciation for the importance of psychological safety matured.

What this section is trying to achieve

This chapter helps you understand how CFN used rules and principles to create freedom with boundaries. It also helps you see that these were refined through learning, not fixed from the start.

Why it matters

Autonomous practice can look risky from the outside if boundaries are unclear. At the same time, rigid pathways often do not work well for people with complex lives. CFN needed a way for staff to act with judgement inside clear limits. The rules and principles helped create that.

Theory and evidence behind it

This chapter draws on bounded autonomy, relational practice and person-centred working. It also reflects ideas from complexity-informed practice: in messy situations, workers need principles that guide good judgement rather than instructions for every possible scenario.

What is CFN-specific

CFN used the language of the Liberated Method and organised the playbook around three rules and five principles. Their wording changed over time as they noticed what was and was not helping.

What is transferable

What is transferable is the need for a small number of non-negotiables and a small number of guiding principles. Staff need to know what must always be true, what they can decide in the work, and how those decisions stay connected to the person's agreed purpose.



What conditions need to be in place

Leaders need to explain the rules and principles clearly and revisit them often. Workers need support to use them in real situations, not just hear them at induction. Teams also need reflective space to surface where boundaries feel too loose, too tight or inconsistently applied.

How to implement or adapt it elsewhere

Start by deciding what your service absolutely needs to protect, and what principles will help workers respond well to complexity. Keep the set small enough to remember and practical enough to use.

CFN acknowledges that some of you will be further along your own journey than others, and that developing a set of rules and principles from scratch may be difficult. Consider the descriptions of the rules and principles in the Playbook and give thought to how these translate in your local area. What can be preserved, for your version 1, and what needs further clarification.

Common risks or misunderstandings

- Thinking rules and principles remove the need for supervision and dialogue.
- Using principles as a justification for anything a worker wants to do.
- Treating purpose as one principle among many rather than the anchor of the work.
- Assuming that once agreed, the rules and principles will never need to change.

Reflection questions

- What are the few things your service needs to hold firm?
- Where do workers currently need more permission to use judgement?
- How will you know whether your principles are helping or creating drift?
- Which current rules protect quality, and which mainly protect habit?

Brief implementation exercise

Re-draft the rules and principles to reflect your local context, amending, removing or adding content based on what this means on Monday, in contact with a real person?

Resources

Read more at <https://www.changingfuturesnorthumbria.co.uk/>.

Chapter 5.1. The Rules

Introduction to the chapter

CFN did not begin with the same three rules they ended with. 'Agree purpose' was added through learning. That matters because it shows the rules are not simply theoretical statements; they were shaped by what practice revealed.



What this section is trying to achieve

This section explains why Agree Purpose, Stay Legal and Do No Harm became the non-negotiable rules of the work.

Why it matters

These rules create the minimum safety and quality standard for autonomous practice. Without them, freedom can quickly become inconsistency or overreach. With them, staff have a clear basis for action and for challenge.

Theory and evidence behind it

Agree Purpose draws on person-centred planning and shared decision-making. It keeps the work anchored in what matters to the person, rather than what matters most to the service.

Stay Legal reflects statutory accountability and defensible practice. For CFN, this rule also created a basis for questioning decisions shaped by narrow, risk-averse or biased interpretations of policy. When staff are guided by both Stay Legal and Do No Harm, they are better placed to challenge restrictive, compliance-led decision making and to surface that tension through learning.

One of CFN's observations was that staff could become focused on creating and maintaining a defensible position as a way of demonstrating compliance and legitimising no further effort to engage: "we've done all we have to and here's our evidence" or "they didn't turn up, what more can we do?" CFN's endeavour was not to work unsafely or to dismiss accountability, but to challenge that culture by asking what else might still be possible within the boundaries of the law and without causing harm. In other words: there may be further options available, even if they sit outside usual norms or expectations.

In this sense, CFN tried to surface the tension between compliance and compassion that staff in services face every day and are often powerless to change.

Do No Harm links to safeguarding, ethical practice and the wider principle of non-maleficence in helping professions. It also provides a strong platform from which to question system conditions or routine practices when they run contrary to that rule.

What is CFN-specific

The exact wording and order of the rules belong to CFN's journey. The fact that Agree Purpose was added later is also part of their learning story.

What is transferable

The transferable message is that autonomous work needs a purpose rule, a legality rule and a harm rule, even if you phrase them differently. Staff need to know that support only makes sense when it is connected to what matters to the person and carried out safely and lawfully.



What conditions need to be in place

Teams need explicit discussion about how these rules apply in everyday situations. Leaders must support staff to pause and escalate, through group supervision, peer support and 1-1 supervision, where a proposed action feels outside boundaries.

How to implement or adapt it elsewhere

Use real examples to test your rules. Ask what each rule would mean in decisions about money, time, contact, risk, information sharing and partnership working.

Common risks or misunderstandings

- Treating do no harm as a reason to avoid all challenge or uncertainty.
- Seeing stay legal as passive compliance rather than a basis for thoughtful challenge to policy interpretation.
- Agreeing purpose once and then letting it drift out of sight.

Reflection questions

- Where do your current systems make it hard to keep purpose visible?
- What would do no harm mean in your context, beyond physical safety?
- How confident are staff in knowing when they need to seek guidance?

Brief implementation exercise

Take a recent practice situation. Re-read it through the three rules. What action was clearly supported, what needed challenge, and what would you do differently next time?

Chapter 5.2. The Principles

Introduction to the chapter

CFN's principles also changed as the work evolved. A good example is the move from 'it takes time' to 'it takes the time it takes'. That shift mattered because it put clearer boundaries around time by linking it back to agreed purpose.

What this section is trying to achieve

This section explains how the principles guide workers to understand, respond and make decisions in complex practice.

Why it matters

A principle-led approach helps staff move away from assessment heavy, service-led responses and towards relational, person-centred action. The principles hold together empathy, judgement and practical boundaries.



Theory and evidence behind it

The principles reflect strengths-based practice, self-determination, relational accountability and community-oriented support. They also reflect complexity: workers need prompts for good judgement rather than scripts for every eventuality.

What is CFN-specific

CFN's five principles and the language used to describe them are part of their own model. The examples they use, such as welfare fund decisions, reflect their own programme design.

What is transferable

- Understand, not assess: lead with curiosity and understanding rather than labels.
- Relationship sets the scope: shape support with the person, not around organisational convenience.
- Decisions in the work: let staff act within clear limits instead of waiting for permission every time.
- Build communities of support: avoid making the worker the only meaningful relationship.
- It takes the time it takes: stay flexible, but only while support still contributes to agreed purpose.

What conditions need to be in place

Workers need examples, reflection and challenge to use principles well. If leaders only state principles without building the conditions to apply them, staff can either freeze or drift.

How to implement or adapt it elsewhere

Turn each principle into a practical question staff can carry into contact. For example: what are we trying to understand here, what is the agreed purpose, what can I decide now, who else matters around this person, and is the time we are spending still contributing to change?

Common risks or misunderstandings

- Assuming principles mean there are no boundaries.
- Equating understanding with endless information gathering.
- Mistaking flexibility for open-ended support without outcomes.
- Forgetting that communities of support include family, friends, peers, community resources and professionals.

Reflection questions

- Which principle would feel most difficult to live out in your current context?
- Where does your service rely too heavily on assessment to understand what matters?
- How clearly do staff know what decisions they can make in the work?



Brief implementation exercise

Choose one principle and translate it into three behaviours you would expect to see in contact with a person, in team discussion and in leadership decision-making.

Chapter 6. Building relationships and getting started

Introduction to the chapter

CFN did not create this section to script workers. They created it to make the purpose of each contact clear, both for the professional and for the person being supported. The aim was to hold purpose in view from the beginning without removing personal style.

What this section is trying to achieve

This chapter explains how early contact is designed to build rapport, clarify expectations and support purposeful engagement. It sets out a structure for what each interaction needs to achieve, while leaving room for each worker to find their own way of doing it.

Why it matters

CFN's learning was that empathy alone can drift into helping without enough clarity. Skilled, caring staff can miss purpose because they are trying to respond kindly in the moment. A clearer structure helps people feel heard and understood while also keeping the work focused on what matters and where the relationship is heading.

Theory and evidence behind it

This chapter draws lightly on the helping relationship, motivational engagement and person-centred practice. It also reflects the idea of explicit practice design: making expectations visible reduces assumptions and improves consistency of experience.

What is CFN-specific

CFN uses the person and caseworker grids as part of its own practice framework. These were especially useful because staff were seconded from different organisations and needed one shared understanding of what good early contact looked like.

What is transferable

What is transferable is the need to define the purpose of early contact clearly, from both sides of the relationship. Services benefit from being able to say: what should the person be thinking, feeling and doing after this contact, and what should the worker be thinking, feeling and doing too?



What conditions need to be in place

You need a shared commitment that this is not a script. You also need induction, coaching and examples so staff understand that structure is there to support quality and consistency, not to erase authenticity.

How to implement or adapt it elsewhere

Create a simple map of the first few contacts in your own service. For each one, describe the purpose, what the person needs from the interaction and what the worker must make clear. Then test whether your current process makes that explicit or leaves too much to guesswork.

Common risks or misunderstandings

- Confusing structure with scripting.
- Assuming rapport means being informal without enough clarity.
- Treating early contact as information gathering rather than relationship building around purpose.
- Leaving new staff to rely only on instinct.

Reflection questions

- What is the purpose of your first three contacts with a person?
- How do you know whether the person leaves feeling heard, clearer and more hopeful?
- Where might staff currently drift into helping without enough focus on purpose?

Brief implementation exercise

Map the first three contacts in your service on one page. For each, write: purpose, what the person needs to understand, what the worker needs to establish, and how the interaction links back to what matters to the person.

Resources

Read more at <https://www.changingfuturesnorthumbria.co.uk/>, and listen to podcasts 4, 8, 9 and 10.

Chapter 7. The person's experience & The caseworker's experience

Introduction to the chapter

The grids in the playbook describing the person's experience and the caseworker's experience were developed to break purpose down into real steps. CFN found that saying 'agree purpose' at a high level was not enough.

What this section is trying to achieve

This chapter helps you use experience design to make relational work more visible. It shows how mapping both sides of the relationship helps workers keep purpose, trust and progress in view.



Why it matters

When services only define worker tasks, they can miss how support feels to the person. When they only focus on feelings, they can miss what the worker is actually trying to achieve. Holding both views together supports better conversations and clearer expectations.

Theory and evidence behind it

This reflects experience-based design, empathy mapping and reflective practice. It also links to person-centred planning because the person's own experience becomes part of how the service shapes its approach.

What is CFN-specific

CFN's exact stages, language and expectations reflect their programme, their cohort and their own learning about how purpose develops over time.

What is transferable

What is transferable is the method of mapping the journey from both perspectives. This helps make invisible relational work visible and gives workers a practical frame for how trust, clarity and momentum are built.

What conditions need to be in place

Teams need time to build and review these journey maps together. They also need permission to update them when practice shows that a stage is too vague, too rushed or no longer useful.

How to implement or adapt it elsewhere

Take one part of your current pathway and write it from the person's point of view and the worker's point of view. Compare them. Notice where assumptions, hidden expectations or unclear purposes sit. Then redesign those stages in plain English.

Common risks or misunderstandings

- Creating journey maps that are too abstract to use in practice.
- Treating them as fixed scripts.
- Ignoring the emotional experience of staff in demanding work.
- Forgetting to review them when the service changes.

Reflection questions

- What do you want a person to think, feel and do after each early contact?
- What do you expect the worker to hold in mind at the same stage?
- Where are your current expectations implied rather than explicit?



Brief implementation exercise

Choose one stage in your pathway. Write two short descriptions: 'the person's experience' and 'the worker's experience'. Compare them with a colleague and agree one practical change you could make this month.

Chapter 8. Checklist – Core Responsibilities

Introduction to the chapter

CFN learned that three rules and five principles were not enough on their own. Workers also needed a very clear summary of core responsibilities and where judgement could be used.

What this section is trying to achieve

This chapter explains how a service can be explicit about minimum expectations while still giving staff room to work relationally and creatively.

Why it matters

Without clear responsibilities, autonomy can feel unsafe or uneven. Without room for judgement, workers can become overly procedural. CFN needed both because staff were seconded and did not come with a single contract or job description that matched the role.

Theory and evidence behind it

This chapter draws on bounded autonomy, adaptive expertise and the idea of minimum specifications in complex work. Clear expectations can support flexibility when they define what must happen without over-prescribing how it happens.

What is CFN-specific

CFN's one-page checklist and examples of where creativity can be used were shaped by their secondment model and their local governance arrangements.

What is transferable

The transferable lesson is to make the non-negotiables visible. Workers need a quick reference for what must be done, what can be flexed and what requires conversation or escalation.

What conditions need to be in place

You need honest conversations about thresholds, risk and external perception. CFN noticed that workers could hold different thresholds, and that others outside the programme could view the same action differently. Clear boundaries and escalation routes help manage that.



How to implement or adapt it elsewhere

Build a one-page role guide for your context. Separate it into three headings: must do, can decide in the work, and must seek guidance. Keep it live and review it when practice reveals confusion.

Common risks or misunderstandings

- Assuming that experienced staff do not need explicit expectations.
- Writing such a detailed list that no room for judgement remains.
- Failing to explain what happens when a worker believes a boundary needs to be stepped over once for good reason.

Reflection questions

- What are the few expectations every worker in your service should be able to say clearly?
- Where do staff currently need to ask permission unnecessarily?
- Where do differences in threshold create anxiety or inconsistency?

Brief implementation exercise

Draft a one-page guide with three columns: core responsibilities, areas for judgement, and escalation points. Test it with staff new to the service and ask what still feels unclear.

Chapter 9. Identifying who we work with

Introduction to the chapter

CFN was clear that it did not want to become a service that people simply referred into. Identification had to support the programme's purpose and the time-limited nature of the funding.

What this section is trying to achieve

This chapter explains the logic behind proactive identification and the importance of knowing who this way of working is for.

Why it matters

If a relational model becomes just another referral destination, it can quickly lose focus and become shaped by system habits instead of its intended purpose. CFN wanted to identify people who needed support and then do the work of building a relationship with them.

Theory and evidence behind it

This chapter draws on proactive outreach, population-based targeting and inclusion. It also reflects a relational view of engagement: if someone is not yet working with you, part of the question is what you need to do to build trust rather than simply labelling them as not engaging.



What is CFN-specific

CFN operated in specific high-demand settings and worked with adults facing multiple disadvantages. Their identification processes were shaped by the programme brief and local partnerships.

What is transferable

What is transferable is the need to think carefully about your target group, entry routes and language. Services can benefit from asking whether their current pathways rely too heavily on people self-presenting, navigating systems alone or proving readiness before help is offered.

What conditions need to be in place

You need agreement about who the approach is for, where unmet need shows up, and what proactive engagement is realistic in your context. You also need language that supports accountability rather than blame.

How to implement or adapt it elsewhere

Map where your service most often sees repeated demand, unmet need or people falling between gaps. Then ask whether a more proactive, relational approach would be useful there. Start small rather than redesigning every access route at once.

Common risks or misunderstandings

- Becoming another referral service by default.
- Describing people as not engaging without examining the service's part in that dynamic.
- Trying to serve too broad a cohort too quickly.

Reflection questions

- Who is this approach most likely to help in your setting?
- Where does unmet need already show up in your system?
- How does your current language about engagement shape practice?

Brief implementation exercise

Identify one group in your service who repeatedly experience unmet need. Write down how they currently enter support, what gets in the way, and what a more proactive first step might look like.

Chapter 10. Initial conversation

Introduction to the chapter

CFN included example conversations because some staff, especially those new to the role, found it helpful to see how others introduced the work. These examples were never intended to become a script.



What this section is trying to achieve

This chapter explains the function of the first formal conversation: introducing the offer, setting expectations, explaining methods and creating enough safety and clarity for the relationship to begin.

Why it matters

People often decide very early whether this feels like more of the same or something different. Staff also need enough confidence to explain the work clearly to both people and professionals. CFN found this difficult because they could look like a service while insisting that they were a learning programme and not simply another service line.

Theory and evidence behind it

This chapter draws on rapport-building, informed consent and motivational engagement. It also reflects the importance of role clarity in complex systems: people need to know who you are, what you can offer and what you are not there to do.

What is CFN-specific

CFN's wording about contracts, consent and the programme identity belongs to their context. Their example scripts emerged from peer sharing and iterative learning.

What is transferable

The transferable message is to be clear, human and honest. Explain what support is for, what commitment is expected, how the relationship will work and what the next step is. Give staff examples, but let them develop their own voice.

What conditions need to be in place

New workers need coaching and opportunities to hear how experienced colleagues explain the model. Services also need consistent messages so people and professionals do not hear something different depending on who they speak to.

How to implement or adapt it elsewhere

Create a short starter pack with key messages, practical prompts and examples that staff can build from. Include how to introduce the model to both people using the service and professional partners.

Common risks or misunderstandings

- Turning prompts into a script that sounds mechanical.
- Leaving staff to improvise without any support.
- Explaining the service in organisational language instead of plain English.
- Over-promising what the relationship can achieve.



Reflection questions

- Could every worker in your team explain your approach clearly in plain English?
- What would a person need to understand after the first formal conversation?
- How do you help new staff find their voice without losing consistency?

Brief implementation exercise

Write a one-minute explanation of your approach for a person and a separate one-minute explanation for a professional partner. Test both with colleagues and refine them until they feel clear, honest and human.

Chapter 11. Agreeing Purpose

Introduction to the chapter

CFN is clear that agreeing purpose is the essential takeaway. The route to purpose can vary, but the presence of a clear agreed purpose cannot.

What this section is trying to achieve

This chapter explains why purpose is the anchor of the work and how it keeps support meaningful, bounded and person-led.

Why it matters

Without an agreed purpose, support can become well intentioned but unfocused. With purpose, people and workers can hold onto what matters, track progress, understand roles and make better decisions about what to do next.

Theory and evidence behind it

This chapter draws on person-centred planning, shared decision-making and solution-focused practice. It also reflects motivational interviewing in the sense that change gains traction when it connects to what matters to the person, not only to what the system wants.

What is CFN-specific

CFN uses its own tools and language to arrive at purpose, including SIGNAL and a particular process for reviewing progress. Those routes are local choices.

What is transferable

What is transferable is the discipline of agreeing a clear purpose, in everyday language, that matters to the person and can be returned to throughout the work.



What conditions need to be in place

Workers need time and skill to help people notice what matters now and what might matter next. Leaders need to keep asking how purpose is being agreed, recorded, reviewed and used to shape decisions.

How to implement or adapt it elsewhere

Be open about the route. You may use a visual tool, a strengths-based conversation or another method entirely. What matters is that the person can recognise the purpose as theirs, and that the team can use it to guide support.

Common risks or misunderstandings

- Confusing service goals with the person's purpose.
- Recording purpose once and never revisiting it.
- Writing purpose in professional language the person would not use.
- Assuming people cannot say what matters until every assessment is done.

Reflection questions

- How does your service currently agree what matters to the person?
- Can staff explain the difference between a service objective and an agreed purpose?
- Where does purpose shape decisions, and where is it mostly symbolic?

Brief implementation exercise

Take one current case. Rewrite the main goal as a purpose statement in everyday language. Then ask: would the person recognise this as theirs, and can we see how it guides the next decision?

Chapter 12. SIGNAL

Introduction to the chapter

CFN chose to use SIGNAL. They are clear that SIGNAL is not an assessment. It is a self-guided conversation that helps a person notice what is important to them and brings priorities to the surface.

What this section is trying to achieve

This chapter explains the role of structured tools in helping people identify priorities, strengths and direction without turning the conversation into a service-led assessment.

Why it matters

Workers often need help to move from broad conversation to shared clarity. CFN found SIGNAL useful because it helped people get to what mattered more quickly and also brought positive, strength-based elements into view.



Theory and evidence behind it

This chapter draws on strengths-based practice, visual facilitation and narrative approaches. Structured tools can support reflection and agency when they help a person make sense of their own situation rather than answer questions for the system.

What is CFN-specific

SIGNAL itself, its cost, its format and the way CFN uses it are specific to their context.

What is transferable

What is transferable is the need for some kind of tool, prompt or structured conversation that helps people identify what matters, notice strengths, prioritise and compare progress over time.

What conditions need to be in place

Workers need to feel confident enough with the tool that it supports the flow of conversation rather than interrupting it. Teams also need to be clear that the tool serves purpose, not the other way round.

How to implement or adapt it elsewhere

If you do not use SIGNAL, choose or develop a tool that performs the same function. Ask whether it helps the person notice what matters, supports strengths-based reflection, guides prioritisation and allows progress to be revisited later.

Common risks or misunderstandings

- Treating the tool as an assessment that must be completed for compliance.
- Letting the number of questions dominate the conversation.
- Assuming that without SIGNAL the approach cannot work.
- Failing to review whether the tool remains helpful once the team is more confident.

Reflection questions

- What tool or structure do you currently use to help people identify priorities?
- Does it feel like an assessment, a conversation or something in between?
- How could you tell whether your tool supports strengths and agency?

Brief implementation exercise

Review one structured tool you currently use. Write down what function it is meant to perform, what helps, what gets in the way and what you would keep, change or replace.

Resources

Read more at <https://clearsignal.org/> .



Chapter 13. The Process

Introduction to the chapter

The process section and six-month support plan were developed because CFN noticed that if progress was not made explicit, work could drift. A shared timeline helped both parties talk about expectation, journey and outcomes.

What this section is trying to achieve

This chapter explains how to move from purpose to a practical, reviewed plan without becoming overly prescriptive.

Why it matters

People need a sense that change is possible and visible. Workers need a way to translate purpose into a sequence of action, review and learning. A simple plan can prevent support becoming a series of helpful moments with no clear direction.

Theory and evidence behind it

This chapter draws lightly on solution-focused scaling, co-produced planning and goal progression. Seeing where someone started and what movement has happened can support hope and better decision making.

What is CFN-specific

CFN uses its own steps, wording and review rhythm, including SIGNAL follow-up and a six-month plan format.

What is transferable

What is transferable is the need to describe success, identify a starting point, plan the journey together and review what is changing. Teams need a method that helps them hold outcomes in view while staying flexible.

What conditions need to be in place

Workers need permission to sketch a journey without pretending the route is fixed. Review points need to be built in so that plans are updated rather than forgotten.

How to implement or adapt it elsewhere

Use a simple planning format that includes agreed purpose, what success would look like, where the person is now, what will be tried first, who will do what and when progress will next be reviewed.



Common risks or misunderstandings

- Confusing flexibility with having no plan.
- Creating overly detailed plans that become unrealistic quickly.
- Leaving progress too vague to notice and discuss.
- Treating a six-month view as a deadline rather than a sketch of the journey.

Reflection questions

- How do your current plans help people see progress?
- Where does work drift because the next steps are too unclear?
- How do you review plans without turning them into a compliance exercise?

Brief implementation exercise

Take one current support plan and rewrite it using five prompts: agreed purpose, what ten would look like, current starting point, next small steps and review date.

Chapter 14. Using AI as a Thinking Partner

Introduction to the chapter

CFN encouraged teams to use AI to help find things out, explore options and think through possibilities. They did not use it to agree actions for the person or to replace professional judgement.

What this section is trying to achieve

This chapter explains how AI can be used proportionately as a thinking tool rather than a decision-maker.

Why it matters

Used well, AI can help workers generate options, structure thinking and do quick background exploration. Used badly, it can create over-confidence, poor-quality outputs or unsafe handling of information.

Theory and evidence behind it

This chapter reflects human-in-the-loop design and ethical AI use. The key principle is augmentation rather than replacement: technology can support thinking, but people remain responsible for judgement, relationships and decisions.

What is CFN-specific

CFN's prompts, examples and boundaries reflect their own experimentation and risk appetite.



What is transferable

What is transferable is the principle that AI should help workers explore opportunities, not provide answers. It can support research, option generation and draft thinking when used safely and critically.

What conditions need to be in place

You need clear rules about confidentiality, anonymisation and acceptable use. Staff need support to question outputs, not accept them at face value.

How to implement or adapt it elsewhere

Start small. Identify two or three safe use cases such as exploring local options, summarising themes from anonymised notes or drafting questions to take back into supervision. Be explicit about what AI must never be used for.

Common risks or misunderstandings

- Treating AI as an authority rather than a prompt.
- Sharing identifiable information.
- Using AI to decide what the person should do.
- Assuming efficiency is the main benefit.

Reflection questions

- What would be a safe and useful starting point for AI in your service?
- What would staff need to know before using it well?
- Where could AI support curiosity without taking over judgement?

Brief implementation exercise

List three tasks where AI could help you think, and three tasks where it must not be used. Turn that into a simple starting guide for your team.

Chapter 15. Journaling

Introduction to the chapter

CFN did not want journaling to become a verbatim case-note culture. The primary purpose was learning: what happened, how did it go, why did you get what you got, and how did this interaction relate to agreed purpose?

What this section is trying to achieve

This chapter explains journaling as a reflective practice tool as well as a record of contact.



Why it matters

Traditional case notes can become defensive records that are long, time-consuming and light on learning. CFN wanted journals to capture how interactions went, what they achieved, how people felt and what could be learned from that.

Theory and evidence behind it

This chapter draws on reflective practice and the learning organisation. Reflection becomes more useful when it moves beyond description into noticing patterns and testing assumptions.

What is CFN-specific

CFN's journaling expectations, templates and the FACTUAL mnemonic belong to their local system and evolved over time.

What is transferable

What is transferable is the idea that records can support both accountability and learning. A journal can focus on purpose, interaction, outcome and reflection rather than only producing a defensible narrative.

What conditions need to be in place

Teams need a separate place for formal risk recording, so journals do not have to carry all safety information. Leaders also need to model that thoughtful reflection is valued, not just fast completion.

How to implement or adapt it elsewhere

Review your current recording format. Ask whether it helps staff notice how interactions went, why progress did or did not happen, and what they want to try next. Add a small number of prompts if needed.

Common risks or misunderstandings

- Turning reflective journaling into another long narrative record.
- Losing factual clarity because the record is more reflective.
- Expecting the journal to replace all formal risk documentation.

Reflection questions

- What do your current notes encourage staff to record?
- How easy is it to see purpose, progress and learning in them?
- What would change if journaling focused more on reflection than transcription?

Brief implementation exercise

Take one recent record and ask four questions: what happened, how did it go, why did it go that way, and what does that mean for the next step? Use the answers to design a new note template.



Chapter 16. Risk Management Plan

Introduction to the chapter

CFN saw the risk management plan as a safety tool. Journaling was for learning; risk planning was where risk and mitigation needed to sit clearly.

What this section is trying to achieve

This chapter explains how live risk management supports people, staff and the wider public within a relational and autonomous model.

Why it matters

Relational work often involves responding flexibly in real-world settings. That increases the need for shared awareness of risk, clear mitigation and up-to-date planning.

Theory and evidence behind it

This chapter draws on dynamic risk assessment and positive risk management. Good risk work is not about avoiding all uncertainty; it is about making proportionate decisions with a clear view of what could happen and how it will be mitigated.

What is CFN-specific

CFN's templates, review rhythm and examples reflect their own operating model and cohort.

What is transferable

The transferable message is that every relational model needs a live, reviewed risk plan that is separate from reflective journaling and clear enough to guide action.

What conditions need to be in place

Workers need to know when risk plans must be updated, how mitigation is recorded, and when additional support or escalation is needed. Managers need visibility without taking away worker judgement.

How to implement or adapt it elsewhere

Keep risk planning simple and live. Record the risk, who is at risk, likelihood, impact, mitigation and review point. Then check whether that plan is actually being used in decision making.

Common risks or misunderstandings

- Leaving risk plans static while the situation changes.
- Hiding key risk information in case notes instead of the live plan.
- Treating risk as the manager's concern rather than a shared practice responsibility.



Reflection questions

- How live are your current risk plans?
- Can workers easily find and use the key mitigation steps they need?
- What is the relationship between your recording system and your risk management process?

Brief implementation exercise

Review one current risk plan against five questions: is it current, clear, specific, shared and actively shaping decisions? Note one improvement you can make this week.

Chapter 17. Learning Review

Introduction to the chapter

CFN describes learning reviews as one of the biggest areas of learning in the whole programme. The mindset matters as much as the process. Learning reviews are not there to tell someone what they did wrong or prescribe the next action. They are there to reflect, notice patterns and open enquiry.

What this section is trying to achieve

This chapter explains learning reviews as a structured way of turning practice into shared understanding and service improvement.

Why it matters

When staff only review cases to monitor performance or solve immediate problems, wider learning can be lost. CFN used learning reviews to challenge assumptions, notice frustration, test improvements and change even core parts of the model when needed.

Theory and evidence behind it

This chapter draws on experiential learning, reflective practice and organisational learning. It also reflects the idea of double-loop learning: not only asking what action to take next, but questioning the assumptions and processes that shaped the situation in the first place.

What is CFN-specific

CFN's review cadence, participants and the way learning fed directly into changing the playbook belong to their own programme design.

What is transferable

What is transferable is the principle of creating a structured conversation where practice can be explored curiously and safely, with the expectation that services themselves may need to change.



What conditions need to be in place

You need psychological safety, facilitation skill and leaders who join to learn rather than judge. You also need a clear distinction between reflective enquiry and operational escalation.

How to implement or adapt it elsewhere

Start with one review space and be explicit about its purpose. Use prompts that surface what is known, what is unclear, what assumptions are being made and what the work might be missing.

Common risks or misunderstandings

- Turning learning reviews into performance conversations.
- Using them to tell peers what they should do next.
- Failing to act on what the learning surfaces.
- Assuming only frontline practice is open to change.

Reflection questions

- What is the current purpose of your case review spaces?
- How often do they generate new understanding rather than only next actions?
- How open is your service to changing process in response to what is learned?

Brief implementation exercise

Design a pilot learning review using four prompts: what do we know, what do we not yet know, what assumptions may be shaping us, and what might we be missing entirely? Test it with one case discussion.

Chapter 17.1. Kolb's cycle of experiential learning

Introduction to the chapter

CFN introduced Kolb's cycle later as a framework to support the conversations they were already having.

What this section is trying to achieve

This section explains how concrete experience, reflection, conceptualisation and experimentation can help teams learn from practice.

Why it matters

Without a simple learning loop, reflection can stay vague. Kolb's cycle gives teams a way to move from what happened to what it means and what to try next.



Theory and evidence behind it

Kolb's experiential learning cycle is widely used in professional learning. In this context, the casework is the concrete experience; journals, supervision, reviews and network meetings support reflection; new ideas are formed through shared discussion; and those ideas are tested back in practice.

What is CFN-specific

CFN's use of Kolb grew out of their own learning review process rather than being the design starting point.

What is transferable

The transferable point is simple: teams need a repeatable way of learning by doing, reflecting and trying again.

What conditions need to be in place

Workers need time to reflect and leaders need to value experimentation, not just certainty.

How to implement or adapt it elsewhere

Use Kolb lightly. Introduce it as a frame for discussion, not a theory lesson.

Common risks or misunderstandings

- Treating the cycle as a rigid sequence.
- Staying in reflection without moving to action.
- Jumping to action without enough reflection.

Reflection questions

- Where does your team currently reflect on concrete experience?
- What helps move learning into the next experiment?

Brief implementation exercise

Take one recent example of practice and map it across the four parts of Kolb's cycle. Notice which stage your team is strongest at and which needs more support.

Chapter 17.2. The Rumsfeld Matrix

Introduction to the chapter

CFN later noticed they were also drawing on the Rumsfeld matrix, particularly to surface the unknown known and open up new lines of enquiry.



What this section is trying to achieve

This section explains how thinking about knowns and unknowns can help teams challenge assumptions and notice what they might be missing.

Why it matters

Services often act on what feels obvious. The matrix creates a pause and invites curiosity about certainty, uncertainty, tacit knowledge and blind spots.

Theory and evidence behind it

The Rumsfeld matrix is not a full theory of practice, but it is a helpful thinking device. It can support decision making by helping teams notice what is evidenced, what is unclear, what feels known without being fully spoken and what may sit outside current attention.

What is CFN-specific

CFN adopted this frame through practice rather than from the outset.

What is transferable

What is transferable is the habit of asking what we know, what we do not know, what we may be assuming and what we may not even have thought to ask.

What conditions need to be in place

Teams need a culture where it is acceptable to say 'I do not know' and to speak up about what feels unsaid.

How to implement or adapt it elsewhere

Use the matrix sparingly as a discussion aid in learning reviews or supervision.

Common risks or misunderstandings

- Using the matrix as jargon rather than a prompt for better questions.
- Treating tacit concerns as less important because they are harder to evidence immediately.

Reflection questions

- What do we know for certain here?
- What might we know without having said it clearly?
- What might we be missing entirely?

Brief implementation exercise

Use the four quadrants with one case or one service issue. Note one new question that emerges from each quadrant.



Chapter 18. Network Meetings

Introduction to the chapter

CFN talks proudly about network meetings. They are clear these are not MDTs. They emerged through learning when the team noticed tension and mismatch between different professionals' understandings of a person's situation.

What this section is trying to achieve

This chapter explains how network meetings build a shared narrative around what matters to the person and what each person in the network can do.

Why it matters

When many professionals hold only part of the picture, support can become fragmented and one person's action can unintentionally get in the way of another's. Network meetings help align understanding and contribution.

Theory and evidence behind it

This chapter draws on collaborative working, social capital and systems thinking. Communities of support matter because the worker should not become the only meaningful relationship or the sole coordinator of progress.

What is CFN-specific

CFN's meeting format, language and resources belong to their local model. The fact that some meetings involved very large networks also reflects their cohort and context.

What is transferable

What is transferable is the distinction between coordination-only meetings and meetings centred on what matters to the person. A network meeting should create a single narrative and shared action around purpose.

What conditions need to be in place

You need a clear invitation, the right people, and a shared expectation that the meeting is about contribution rather than passive attendance. Someone also needs enough knowledge of the person's story to hold the conversation together well.

How to implement or adapt it elsewhere

Start by mapping the person's network. Bring together those who matter around the purpose, including people who may support from a distance. Be explicit that the aim is to agree who can do what without working at cross purposes.



Common risks or misunderstandings

- Running the meeting as a traditional MDT focused only on risk and updates.
- Leaving the person's purpose out of view.
- Inviting too many people without a clear role.
- Failing to follow through on actions.

Reflection questions

- How do your current meetings differ from what CFN means by a network meeting?
- Where could a shared narrative improve outcomes in your own service?
- Who needs to be in the room, and who simply needs to be informed?

Brief implementation exercise

Choose one person with multiple professionals around them. Map the network, identify where actions may be working at cross purpose, and design a purpose-led network conversation.

Chapter 19. Closure

Introduction to the chapter

CFN hoped that many relationships would come to a natural end, but they also learned that endings need more support than that. Some workers and some people are not good at endings, and closure can drift into ongoing facilitation unless it is noticed.

What this section is trying to achieve

This chapter explains how closure should be shaped by the relationship and agreed purpose rather than by an arbitrary organisational deadline.

Why it matters

Poor endings can create confusion, dependency or abrupt withdrawal. Good endings support transition, acknowledge progress and make clear when the role has changed or finished.

Theory and evidence behind it

This chapter draws on transition planning, ethical endings and relational boundaries. In person-centred work, endings matter because they shape what the person takes from the relationship as much as the early contacts do.

What is CFN-specific

CFN's closure letter, internal process and examples of clear closure situations belong to their own programme.



What is transferable

What is transferable is the need to notice when support is still contributing to purpose and when it has drifted into holding or ongoing facilitation. Group supervision can be a key place to challenge this supportively.

What conditions need to be in place

You need reflective spaces where endings can be discussed honestly and where workers can be challenged kindly when they are staying involved beyond what is helpful.

How to implement or adapt it elsewhere

Define what good closure looks like in your context. Build in prompts that ask whether the purpose has been reached, changed, stalled or passed to others, and what kind of ending the relationship now needs.

Common risks or misunderstandings

- Assuming relational work should never end because the relationship is valued.
- Ending because time is up rather than because purpose and need have shifted.
- Avoiding the conversation because endings feel uncomfortable.

Reflection questions

- How do people know when support is nearing an end in your service?
- Where does helpful support become ongoing facilitation?
- What role can supervision play in noticing readiness for closure?

Brief implementation exercise

Take one current piece of support and ask: what is the current purpose, is support still contributing to it, what signs suggest closure is approaching, and what would a good ending involve?

Chapter 20. Welfare Fund

Introduction to the chapter

The welfare fund was a major area of learning for CFN. They are open that this is one part of the model they would keep changing if the programme continued.

What this section is trying to achieve

This chapter explains why a small amount of flexible practical resource can matter, and why it needs clear boundaries and learning around its use.



Why it matters

Sometimes a small practical barrier gets in the way of engagement or progress. At the same time, practical support can create unhealthy dependency if it becomes a quick fix or ongoing substitute for longer-term change.

Theory and evidence behind it

This chapter draws on person-centred support and behavioural friction: small barriers can have a large impact on what someone is able to do. It also reflects ethical decision making and proportionality.

What is CFN-specific

CFN's welfare fund, the PLANE framework and their spend examples are local to the programme.

What is transferable

What is transferable is the need for some form of proportionate, auditable, ethical way to remove practical barriers when this clearly contributes to agreed purpose.

What conditions need to be in place

You need a clear decision process, income maximisation as the first step, and reflective supervision where repeated or uncertain spends can be challenged.

How to implement or adapt it elsewhere

If you have access to flexible resource, create a simple decision tool. Test not just whether something can be bought, but whether it is proportionate, necessary and helping in a sustainable way.

Common risks or misunderstandings

- Using flexible funds as the first rather than last resort.
- Confusing kind action with helpful action.
- Repeating spends without noticing dependency.
- Failing to connect purchases back to agreed purpose.

Reflection questions

- What practical barriers commonly get in the way in your service?
- How do you currently decide whether flexible support is justified?
- Where might kindness be slipping into unsustainable rescuing?

Brief implementation exercise

Take one recent practical support decision and review it against a local version of PLANE. What helped, what felt unclear and what guidance does your team need?



Chapter 21. How we build relationships and support each other

Introduction to the chapter

This whole section was added later, particularly in the final 12 to 18 months, when CFN worked with Helen Sanderson and her team to improve how they worked as teams. What this section is trying to achieve

This chapter explains why relational practice cannot only be something you do with people using the service. It also has to shape how the team works together.

Why it matters

CFN learned that confident and competent staff do not appear simply because the practice model is strong. Teams need ways of working together that build trust, support accountability and make it easier to notice strain, tension and drift.

Theory and evidence behind it

This chapter draws on psychological safety, self-managing teams and relational leadership. Amy Edmondson's work is useful here: teams perform better when people feel able to speak up, ask for help and reflect honestly.

What is CFN-specific

CFN's exact practices were introduced by Helen Sanderson and reflect the realities of their team structure, small caseloads and learning culture.

What is transferable

What is transferable is the principle that if you want staff to work relationally with others, you need to create relational conditions inside the team as well.

What conditions need to be in place

Leaders need to model reflection, transparency and repair. Teams need permission to shape their own ways of working and revisit them when practice changes.

How to implement or adapt it elsewhere

Review not only how your service works with people, but how your team works with itself. Ask whether your internal culture mirrors the values you want external practice to reflect.

Common risks or misunderstandings

- Treating team culture as separate from service quality.
- Assuming strong relationships remove the need for clear agreements.
- Trying to copy self-managing practices without the supporting conditions.



Reflection questions

- How relational is your team culture in practice?
- What helps staff feel seen, supported and able to speak honestly?
- Where does your internal culture undermine your external intent?

Brief implementation exercise

Ask your team to name three things that help them do their best work together and three things that get in the way. Use the answers to identify one internal change to test.

Chapter 22. One-page profiles

Introduction to the chapter

One-page profiles mattered to CFN because they helped people feel seen, heard and understood. Everyone completed one and shared it with everyone else.

What this section is trying to achieve

This chapter explains how one-page profiles can support stronger working relationships inside a team.

Why it matters

People often work alongside each other while knowing little that is useful about how colleagues work best, what matters to them and what support helps. One-page profiles make that explicit in a simple format.

Theory and evidence behind it

This chapter draws on person-centred thinking, originally developed through person-centred planning work. One-page profiles were developed by Helen Sanderson and her team and introduced to CFN. The same logic that helps people feel understood in support can help colleagues understand each other better too.

What is CFN-specific

CFN used one-page profiles as part of a wider self-managing team approach, to help team members understand what matters to each other.

What is transferable

What is transferable is the idea that teams benefit from a quick, human way of understanding what matters to each other, what people appreciate and how best to support one another.



What conditions need to be in place

There needs to be trust, consent and care in how profiles are shared and used. They should support relationships, not become a token exercise.

How to implement or adapt it elsewhere

Introduce profiles with a clear explanation of purpose. Keep them short, practical and easy to revisit.

Common risks or misunderstandings

- Treating profiles as icebreakers with no follow-through.
- Asking people to share more than they are comfortable sharing.
- Filling them away instead of using them in everyday team life.

Reflection questions

- How well do colleagues in your team understand what matters to each other?
- What would help staff feel more seen and supported by one another?
- How might one-page profiles improve induction or team development?

Brief implementation exercise

Pilot a one-page profile with a small group. Ask afterwards: did this help us understand each other better, and what would make it more useful in day-to-day work?

Resources

One Page Profile Animate: [1PP Staff: What is a 1 page profile](#)

Using One-Page Profiles are an important part of psychological safety and you can learn more about that here: <https://www.koganpage.com/hr-learning-development/psychological-safety-in-practice-9781398629400>

Chapter 23. Team Agreements

Introduction to the chapter

Team agreements were new to CFN and were introduced through Helen Sanderson's work. The team built them together by drawing out what mattered most and reducing that until they had something they could genuinely live with.

What this section is trying to achieve

This chapter explains how co-created agreements help teams work well together in demanding, relational roles.



Why it matters

CFN had experience of relationships breaking down between peers and between managers and staff. Team agreements became a way to be explicit about expectations, repair and how people wanted to work together.

Theory and evidence behind it

This chapter draws on team norms, psychological safety and self-managing teams. Teams function better when expectations are discussed openly rather than left to assumption. Connection is one of the Five Foundations of Psychological Safety, and Team Agreements are the main way to put this into practice and to increase psychological safety in the team.

What is CFN-specific

CFN's exact team agreement and the diagram showing factors that support teams are local to their context.

What is transferable

What is transferable is the process of co-creating agreements from real experience, including what people found difficult in previous roles or in this one.

What conditions need to be in place

You need enough trust for people to talk honestly about what helps and harms team functioning. Leaders need to resist the temptation to write the agreement for people.

How to implement or adapt it elsewhere

Facilitate a team conversation about what helps people do their best work together, what gets in the way and what commitments are needed. Reduce it to a small set of useful, lived agreements.

Common risks or misunderstandings

- Treating agreements as values statements rather than working commitments.
- Creating too many points for anyone to remember.
- Failing to revisit the agreement when tensions emerge.

Reflection questions

- What assumptions about working together remain unspoken in your team?
- What would staff say they find hardest in team relationships?
- How could co-created agreements support confidence and competence?

Brief implementation exercise

Run a short workshop asking: what do we need from each other to do this work well, what gets in the way, and what five commitments should shape how we work?



Resources

Psychological Safety in Practice describes the Five Foundations of Psychological Safety and the 15 practices that people can use. One of the Practices is Team Agreements.

<https://www.koganpage.com/hr-learning-development/psychological-safety-in-practice-9781398629400> .

The Teams at CFN used Tensions to Team Agreements cards to move from tensions to Team Agreements, [Tension Cards](#).

Chapter 24. One-to-ones and Confirmation Practices

Introduction to the chapter

CFN used confirmation practice within one-to-ones as a way of asking staff to account for how they are living their role, rather than simply enforcing a set of values from above.

What this section is trying to achieve

This chapter explains how one-to-ones can become a space for high support and high challenge, grounded in the team agreement and personal responsibility.

Why it matters

Relational work can ask a lot of staff. Helen Sanderson introduced Confirmation practices to the team to create transparency and shared support by inviting people to rate themselves, choose one area to focus on and share their goal with the team. The team used Confirmation Practices both around their individual roles and their team agreements.

Theory and evidence behind it

This chapter draws on coaching, self-efficacy and reflective practice. It also reflects high support and high challenge: staff are not left alone with their struggle, but neither is the issue avoided. Clarity is one of the Five Foundations of Psychological Safety and clear roles are one the important practices here for building a psychologically safe team.

What is CFN-specific

CFN's exact confirmation practice process were based on their roles and team agreements and are local to the programme.

What is transferable

What is transferable is the move from compliance-based management to reflective accountability. People can be asked to notice where they are struggling, name support they need and work towards a shared goal. You can take your roles and team agreements and make them into Confirmation Practices.



What conditions need to be in place

One-to-ones need protected time. The wider team also needs a culture where shared goals invite support rather than judgement. You need a place to share goals from Confirmation Practices transparently.

How to implement or adapt it elsewhere

You might start by linking confirmation practice to a small number of role expectations or team agreements. Ask staff to score themselves, choose one area to work on and identify what support would help.

Common risks or misunderstandings

- Using self-rating as a disguised performance management exercise.
- Forcing staff to choose the lowest-scoring area rather than the area that matters most.
- Sharing goals without creating real support around them.

Reflection questions

- What is the current purpose of your one-to-ones?
- How do staff account for how they are living the role, not just completing tasks?
- What would make one-to-ones more developmental and more transparent?

Brief implementation exercise

Pilot a simple confirmation practice in one-to-ones for one month. Ask staff to choose one area they want to strengthen and one type of support they need, then review what difference it makes.

Resources

Psychological Safety in Practice describes the Five Foundations of Psychological Safety and the 15 practices that people can use. One of the Practices is Confirmation Practices.

<https://www.koganpage.com/hr-learning-development/psychological-safety-in-practice-9781398629400> .

Taken from the Changing Futures Webinar Series hosted by Helen Sanderson, this episode is focused on supporting staff to create safe learning environments. Helen talks to Changing Futures Northumbria's Operations lead, Tori Johansen. <https://podcasts.apple.com/ie/podcast/changing-futures-northumbria-webinar-supporting-staff/id1816179507?i=1000747489307> .



Chapter 25. Group Supervision

Introduction to the chapter

CFN's group supervision structure was created with the team and refined over time. It is a space for curiosity, reflection and supportive challenge, not a place for peers to tell peers what to do or to simply vent.

What this section is trying to achieve

This chapter explains group supervision as a collective reflective space that helps staff bring struggles, uncertainty and stuckness into the open.

Why it matters

In demanding relational work, workers need somewhere to think together. CFN invested heavily in understanding how staff were working around person-centred purpose, and group supervision became one of the places where that learning could happen.

Theory and evidence behind it

This chapter draws on reflective supervision, peer learning and emotional containment. Good supervision helps people notice patterns, connect feeling and action, and think more clearly about their part in the work.

What is CFN-specific

CFN's group size, time allocation and ability for everyone to take a turn were supported by deliberately small caseloads. That may not transfer directly to other services.

What is transferable

What is transferable is the idea of a protected reflective group where peers offer reflections and challenge, where check-ins matter, and where people are asked to consider their own part in the situation.

What conditions need to be in place

You need clear purpose, facilitation and enough safety for people to bring real struggles. You also need to be explicit that staff do not have to save concerns until supervision; support should be available at any time.

How to implement or adapt it elsewhere

Adapt the format to your capacity. Even if you cannot mirror CFN's time or caseload conditions, you can still create a reflective group with check-ins, focused discussion and an expectation of curiosity rather than fixing.



Common risks or misunderstandings

- Turning supervision into a case allocation or instruction-giving meeting.
- Allowing it to become a space to complain without reflection.
- Assuming the exact CFN format is practical in every setting.

Reflection questions

- What is the real purpose of your current supervision spaces?
- How often do peers reflect with each other rather than advise each other?
- What would make supervision feel safer and more useful?

Brief implementation exercise

Review your current group supervision against four questions: does it create reflection, supportive challenge, shared learning and emotional containment? Identify one change to test next month.

Chapter 26. Being Safe: Lone Working / Out of Hours

Introduction to the chapter

CFN usually worked in pairs, but lone working still happened. They also learned that out-of-hours contact needed more explicit structure because caring workers can easily blur boundaries.

What this section is trying to achieve

This chapter explains how to support staff safety and healthy boundaries within a relational model.

Why it matters

People attracted to frontline relational roles often care deeply. Without clear boundaries, that care can become over-availability, boundary drift and fatigue.

Theory and evidence behind it

This chapter draws on duty of care, occupational safety and sustainable practice. Good boundaries protect both the worker and the person because they make support more reliable and less dependent on individual over-extension.

What is CFN-specific

CFN's pairing model, lone-working questions and out-of-hours processes belong to their own service design.

What is transferable

What is transferable is the need to be explicit about when lone working is appropriate, what additional precautions are needed and how out-of-hours work is decided collaboratively.



What conditions need to be in place

Workers need permission to stop, to hand over and to ask for support. Leaders need to challenge heroic patterns that look caring but are unsustainable.

How to implement or adapt it elsewhere

Create a simple set of questions for lone working and out-of-hours work. Use them each time rather than assuming that because something was allowed once it is now always acceptable.

Common risks or misunderstandings

- Treating dedication as unlimited availability.
- Assuming pair working removes the need for lone-working guidance.
- Letting informal norms replace explicit boundary-setting.

Reflection questions

- What boundary issues are staff currently navigating in your service?
- How clear is your guidance on lone and out-of-hours working?
- What support do staff need to care well without over-extending themselves?

Brief implementation exercise

Write a short decision guide for lone working and out-of-hours contact. Include what questions must be asked, who needs to be involved and when an alternative approach should be used.

Chapter 27. Support Sequence Prompts

Introduction to the chapter

The appendices in the playbook are there to support the rest of the document. They are not separate ideas. They help workers think about their role, the next step and how to use the wider approach consistently.

What this section is trying to achieve

This chapter explains the role of prompts, process tools and support sequences in helping workers think well without becoming overly procedural, which was introduced to CFN later on in their journey by Ben Rosamond from Helen Sanderson Associates.

Why it matters

Autonomy is easier to use well when workers have practical thinking aids. These tools can help maintain purpose, guide reflection and support consistency in a team made up of staff from different backgrounds.



Theory and evidence behind it

This chapter draws on cognitive scaffolding and decision support. Good prompts support judgement; they do not replace it.

What is CFN-specific

CFN's support sequence, prompt wording and local tools were developed by Helen Sanderson Associates and can be used in most planning situations and reviews.

What is transferable

What is transferable is the need for light-touch tools that help staff notice what role they are taking, what options exist and how support should be sequenced. You can learn more about how to use this sequence in the resources.

What conditions need to be in place

Workers need to understand why the prompt exists and when to use it. Leaders need to review whether tools are helping people think or simply adding paperwork.

How to implement or adapt it elsewhere

Audit your current prompts and templates. Remove what does not help thinking. Strengthen what supports purpose, sequencing and clarity.

Common risks or misunderstandings

- Building too many prompts and burying workers in process.
- Using prompts as scripts.
- Treating tools as fixed rather than open to iteration.

Reflection questions

- Which prompts in your current system genuinely help workers think better?
- Which ones mainly exist because they always have?

Brief implementation exercise

Choose one current tool and ask staff what function it serves, whether it helps in real practice and how it could be simplified or strengthened.

Resources

Helen Sanderson Associates have developed a learning programme to support this work. A 10-month development programme for anyone providing support for adults using care services in the NHS or Local Authorities. Combining online learning with monthly group coaching, you'll be supported to create change using the Support Sequence, designed to turn what matters most to a person into meaningful, achievable change. [Creating Change Using the Support Sequence](#).



Chapter 28. Role-based Confirmation Practices

Introduction to the chapter

Role-based prompts supported confirmation practice in CFN, especially because staff were seconded and their original job descriptions often did not match the role they were now delivering. They were introduced in the last 14 months of the programme by Helen Sanderson.

What this section is trying to achieve

This chapter explains how clear role prompts can support growth, confidence and consistency.

Why it matters

People cannot reflect well on their practice if the role itself is unclear. Role-based reflection helps workers connect day-to-day behaviour with the purpose of the model.

Theory and evidence behind it

This chapter draws on role clarity, reflective practice and developmental coaching. Clarity reduces anxiety and makes feedback more useful, and these are a key part of psychological safety. There is a case study about CFNs work here in the book in the resource section at the end of this chapter.

What is CFN-specific

CFN's role summaries and local role expectations belong to their own programme.

What is transferable

What is transferable is the use of clear, simple role prompts that help workers reflect on how they are living the approach.

What conditions need to be in place

You need a role description that reflects reality, not only legacy paperwork. Managers also need time and confidence to coach rather than only monitor.

How to implement or adapt it elsewhere

Create a short role summary for anyone delivering the model. Use it in induction, one-to-ones and supervision to build a common language of practice.

Common risks or misunderstandings

- Assuming existing job descriptions are sufficient when the role has changed.
- Letting role prompts become another compliance checklist.
- Failing to revisit the role as the model evolves.



Reflection questions

- Do current role descriptions reflect the work people are actually doing?
- How do staff learn what relational, purpose-led practice means in their role?

Brief implementation exercise

Draft a one-page role summary for one key role in your service. Include what the role is for, what it must hold onto and what good practice looks like.

Resources

Psychological Safety in Practice describes the Five Foundations of Psychological Safety and the 15 practices that people can use. One of the Practices is Confirmation Practices, and it includes a case story from CFN. <https://www.koganpage.com/hr-learning-development/psychological-safety-in-practice-9781398629400>.

Chapter 29. Parts Four and Five

Introduction to the chapter

This final chapter explains how to use appendices, templates and practical tools well. They should support your local version of the model, not replace thinking.

What this section is trying to achieve

This chapter helps you decide which practical resources are useful to include behind your own playbook and how to keep them proportionate.

Why it matters

Useful appendices make implementation easier. Overbuilt appendices can make a guide feel like a manual and pull attention away from purpose, learning and relationships.

Theory and evidence behind it

This chapter reflects the idea of just enough structure. Tools should reduce friction, support good thinking and help teams do the work consistently.

What is CFN-specific

CFN's appendices, prompt sets and resource library are shaped by their own model, digital systems and ways of working.

What is transferable

What is transferable is the principle of building a practical resource set that supports induction, reflection, supervision, network meetings, safe AI use and role clarity.



What conditions need to be in place

Appendices need ownership and review. Someone should know why each tool exists and whether it still earns its place.

How to implement or adapt it elsewhere

Only include resources that support real practice. Review them regularly and remove what no longer helps. Let the guide stay readable and use appendices to hold detail where needed.

Common risks or misunderstandings

Treating every useful idea as something that needs its own appendix.

Building a resource library nobody actually uses.

Letting tools multiply without review.

Reflection questions

Which practical resources would help your staff most?

What can stay in the chapter and what belongs in an appendix?

How will you keep your appendix set live and useful?

Brief implementation exercise

Create a shortlist of no more than six practical resources you think your local playbook needs for version 1. For each one, write what function it serves and how you will know whether it is useful.

Chapter 30. Additional support for your journey from playbook to practice

First Contact Clinical

Reading a playbook can spark ideas. Turning those ideas into real change is different. It takes skill, leadership, reflection, structure and support over time.

FCC can support teams, services and organisations who want to move from interest in relational, purpose-led practice to practical implementation. We offer support in two main areas:

Skills training to work in a relational way:

We provide training to help practitioners, team leads and services strengthen the skills needed to work in a relational, person-centred and purpose-led way. Drawing on our SCIP ©framework, the training helps participants bring greater structure, clarity and focus to conversations without becoming scripted. It supports people to work more confidently around what matters to the person, agree and



hold a clear purpose, balance empathy with direction, and use questioning and reflection skills to explore priorities, barriers and next steps. The training also helps participants think about how SCIP can be applied in their own role, team or service context to support meaningful and practical change.

Support for implementation:

Relational practice cannot only shape how practitioners work with people using services; it also needs to shape how teams work with each other. FCC can support leaders, managers and teams to create the conditions that make this way of working more possible by helping to develop shared purpose and expectations, strengthen team culture and psychological safety, introduce or refine team agreements, support reflective learning and supervision, and explore more autonomous or self-managing ways of working. This is an area where FCC brings direct experience, having both implemented autonomous teams and supported services to work in more relational, person-centred ways around what matters to the person.

Interested in finding out more?

To find out more about FCC's relational practice training and implementation support, please contact us. We would welcome the opportunity to discuss your service, your ambitions, and how we can support you to begin shaping a version that works in your local context.

Contact FCC via enquiries@firstcontactclinical.co.uk or by calling 0191 432 9838.

Visit our website: <https://www.firstcontactclinical.co.uk/>.

Helen Sanderson Associates

Helen Sanderson Associates have developed a learning programme and practical resources, can support you to introduce the specific practices that they introduced and supported CFN with in the last 14 months of the programme.

These are:

- Clear roles
- One-Page Profiles: help people feel seen, heard and understood.
- Team Agreements: Their 10-month programme gives you the tools, structure and group coaching to develop and embed Team Agreements in your team. You'll learn how to bring them to life in daily work, review and refine them together, and build the habits that make trust, clarity and psychological safety part of how your team works every day. [Creating and Implementing Team Agreements](#)
- Confirmation Practices
- The Support Sequence.



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HSA Learning App:

The freedom of learning and connecting
anytime, from anywhere.



Contact Ben@helensandersonassociates.co.uk or helen@helensandersonassociates.co.uk for more information.

SIGNAL

SIGNAL is a practical approach that helps people and services understand what matters, take action, and learn from real lives. It is:

- a structured way to have better, more meaningful conversations
- a way to turn lived experience into insight that can be used
- an approach that supports action for people and for services

SIGNAL is supported by tools and is growing through a network of partners using it in practice

Find out more: <https://clearsignal.org/> or contact andy.cox@clearsignal.org

Chapter 31. Readiness self-assessment

This self-assessment is designed to help you consider whether the conditions are in place to begin shaping a local version of relational, purpose-led practice.

You can complete it individually, as a leadership team, or with a wider service or team discussion.

For each area, mark yourself as:

Ready – this is already in place or largely in place

Partly ready – some elements are present, but more work is needed

Not yet ready – this is limited, unclear or absent at present

1. Leadership and sponsorship

- There is leadership interest in relational, purpose-led practice.
- Leaders understand that implementation involves more than training.
- Leaders are willing to support learning, adaptation and reflection.
- There is permission to begin small tests of change.



Our rating:

Notes / evidence:

What would strengthen this area?

2. Shared purpose and strategic fit

- There is a clear reason for exploring this approach.
- We can describe the problem or need we are trying to respond to.
- There is some agreement that person-centred, purpose-led work matters.
- This approach fits with wider organisational priorities or ambitions.

Our rating:

Notes / evidence:

What would strengthen this area?

3. Workforce fit and readiness

- We have staff who are open to working in a more relational and adaptive way.
- We recognise that this way of working is not for everyone.
- We can identify likely early adopters or pilot teams.
- We are willing to think honestly about recruitment, selection and induction.

Our rating:

Notes / evidence:

What would strengthen this area?

4. Permissions, autonomy and boundaries

- Staff have some room to use judgement in the work.
- There is clarity, or willingness to create clarity, about boundaries and escalation points.
- We can identify what decisions could be made more locally.
- We are able to distinguish between safe autonomy and unmanaged risk.

Our rating:

Notes / evidence:

What would strengthen this area?

5. Reflective structures and learning

- We have some space for supervision, reflection or learning review.
- Staff can raise uncertainty, concerns or tensions without fear of blame.
- We are open to reviewing and changing processes if learning suggests we should.



- We have ways to capture what we are noticing from practice.

Our rating:

Notes / evidence:

What would strengthen this area?

6. Team culture and internal ways of working

- There is enough trust for honest discussion within teams.
- We are willing to look at how the team works with each other, not only with service users.
- We can have conversations about challenge, disagreement and repair.
- We are interested in strengthening team agreements, role clarity or support structures if needed.

Our rating:

Notes / evidence:

What would strengthen this area?

7. Practical resource and implementation capacity

- We have enough capacity to begin small.
- We can protect at least some time for testing and reviewing.
- We know what practical resources we already have.
- We are realistic about starting with version 1 rather than a full redesign.

Our rating:

Notes / evidence:

What would strengthen this area?

Interpreting your self-assessment

If most areas are **Ready**, you may be in a good position to begin shaping version 1.

If most areas are **Partly ready**, you may still be able to begin, but it will help to start smaller and be explicit about what support or strengthening is needed.

If several areas are **Not yet ready**, that does not mean stop. It may mean your first step is to work on conditions, leadership understanding, reflective structures or workforce readiness before testing wider practice change.

Next step prompt

Based on this self-assessment:

- What are our strongest foundations?
- What are our biggest gaps?



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- What could we begin now?
- What needs wider agreement, support or resource before we go further?
- Who needs to be involved in shaping our version 1?