

Case Summary - Practice Guidance

1. What is a Case Summary?

- 1.1 A case summary is a concise overview that sits on a child's written records which enables anyone reading the file to have an understanding of who the child or young person is, why we are working with the child and their family, what support they are being offered, by who, what we want to achieve and how we will know that the work has made a difference. It also shows what safety plan is in place for the child.
- 1.2 Case summaries provide a specific purpose which is separate to other key documents such as chronologies, plans and assessments; a good case summary is easy to read, it is short, factual, and analysis and considers the impact of the work undertaken to ensure that support offered is the right support at the right time.

2. When is a Case Summary Required?

- 2.1 Every child who is open to Bradford, Children and Families Trust (BCFT) should have a case summary as part of case notes on LCS.
- 2.2 The case summary should be completed as soon as the child is allocated to a worker; it should be updated at least every 3 months, but any significant changes should be updated immediately.
- 2.3 Prior to a child transferring to a different allocated worker or closing to BCFT, the current allocated worker should check that the case summary is up to date and reflective of events that have taken place.

3. What is recorded in a Case Summary?

- 3.1 A Case Summary should be completed using the headings below, using the notes under each heading for guidance.

(i) Child's Profile

Provide an overview of the child and their situation – what is it that makes them unique and individual. Set out what is important to them and what we understand about their daily experiences. Be clear about their wishes and feelings. For a child with disability, include the diagnosis and the impact of this on the child.

Where possible the child or young person can help to write this in their own words.

(ii) Background information

Provide a summary of any previous involvements, any key events, and dates. Set out any significant events that have impacted the child and family.

This should not be a repeat of the chronology, or just a list, but should provide an analytical overview.

(iii) Purpose of our involvement

State briefly why we are involved now with the child and their family? What are the key risks and what are we worried about? What is working well and what are the safety factors? What are we trying to achieve and how do we make this happen?

Record the legal status and any arrangements for contact.

Say where the most recent Child's Plan can be found, as well as any safety plans or risk assessments relevant to the current situation.

For a child with a disability, set out the care package and the personal budget details.

(iv) Progress Made/ update

What has happened in the last 3 months? Note any key events. Are we making a difference for the child and their family? How do we know this (what is our evidence of changes or outcomes)? What has or has not changed? Why have things changed, or why haven't things changed? What is the child's experience?

(v) Goals and what needs to happen next?

What are our goals for the child? Is the plan we have in place achieving these goals? If so, how do we continue to build on this? If not, what needs to happen to achieve them? Be clear about any contingency plans if the proposed plan does not support change.

(vi) Safety plan

Be specific about how we are keeping the child safe, this should be a plan written jointly with the child's parents/carers. A safety plan is not a list of people involved but should be clear about what happens when a child is at risk of harm, what is in place and who is responsible for the action.

(vii)

(vi) Family Contact Details and Professional Involvements.

Ensure that you have the contact details for the child's parent/carers recorded and other family members or friends who are relevant to the child. Check that these are the most up to date details as this is essential information for our emergency duty team who may need this information out of hours.

List the key professionals and telephone number/emails.

4. Tips for writing a good case summary.

- 4.1 Keep it brief, there should be enough information so that anyone reading it can quickly pick up the information needed. Case summaries should not contain lengthy descriptions of events recorded elsewhere.

- 4.2 Each case summary should be individually written for each child in the family; although some of the information may be shared, the impact on each child will be different.
- 4.3 A Case Summary is your chance to critically reflect on whether we are making a difference for a child and why change is or is not happening. The why question is crucial because this will inform your planning about what needs to happen next.
- 4.4 The case summary should be current and not just latest information added to older information as this is confusing for the reader.
- 4.5 Read the case summary regularly to make sure that it is current, think about someone else reading this; would it make sense to them and tell them what the current situation is for the child and what the plan is? If the child reads this as an adult, will they understand it and what we were wanting to achieve?
- 4.6 The child's profile is always more impactful if the child has helped you to write this.
- 4.7 Remember that the case summary sits alongside other key documents but fulfils a different function. It is a more detailed SMART breakdown of the work being completed to support and create change with a child and their family.