

Planning Meeting Guidance

Purpose of the guidance

To provide information and support to workers/organisations asked to engage with a planning meeting to assist us in the delivery of a person centred section 42 enquiry.

What is a planning meeting?

A planning meeting or discussion follows a face to face discussion with the adult and is held in the following circumstances:

- The adult has agreed a set of outcomes that require discussion and agreement on who will take the lead on delivering these and reducing the risks faced by the adult.
- The risks posed by the alleged source of harm to other adults (Person in position of trust – PiPoT) means that we have a duty to address the risks, with or without the consent of the adult.
- The risks potentially affect all adults using the service and an organisational abuse S42 enquiry is needed to address these.

Virtual/informal/formal planning meeting?

Virtual (see exit guidance)

A virtual planning meeting can be held if:

- We have agreed a risk management plan with the adult, or their risks have been reduced as a result of best interest decisions (where the adult lacks capacity to make these decisions for themselves).
- The adult is clear from concern and/or face to face stage how we are going to work with them to meet their outcomes and reduce the risks and is in agreement with this plan.
- The adult decides, free from duress and with capacity, that they wish to exit from safeguarding and manage their own risks, having originally agreed to safeguarding support and help and outlined a set of outcomes.
- The adult lacks capacity and it has been agreed that it is in their best interests to use the safeguarding processes to manage their risks.
- The adult does not wish to engage with safeguarding but the alleged source of harm poses a risk to other adults but the risks can be managed by a single agency –e.g. disciplinary process by the employer.
- The risks posed by the alleged source of harm have been addressed by completion of a disciplinary, criminal or other process and if necessary referrals to DBS, professional registration bodies have been completed.

Informal via use of a meeting that the adult can attend or is specifically about the adult – e.g Care Programme Approach (CPA) meeting, social care review etc (see exit guidance)

An informal meeting (within an existing format) can be held if:

- The adult agreed at face to face meeting that their outcomes/risk reduction plan can be met using existing care management processes e.g social care support, care programme approach, within a care management plan with an agency involved with them. The informal meeting will provide an opportunity for the adult to have documented their outcomes, who

is taking responsibility for working on meeting these and an audit trail for the adult and/or their family/advocate.

- The adult lacks capacity or is unable to be involved at this stage (mental ill health etc.) and risks can be managed within a care plan until the adult is in a position to advise us of their wishes.

Formal planning meeting (see exit guidance)

A formal planning meeting should always be considered in the following circumstances:

- The adult or their advocate want to attend a meeting with agencies who will be involved in meeting their outcomes to assure themselves that their outcomes will be met and how/when.
- A significant risk exists for other adults from the alleged source of harm and a meeting is needed to address these, especially if the adults are choosing not to engage with safeguarding and/or lack capacity to make a choice about engaging with the process.
- The concerns involve a number of adults placed from out of area and it will be necessary to engage the funders/placing organisations to evaluate the appropriateness of the placement.
- Agencies/workers who will be tasked with completing aspects of the S42 enquiry, including PiPoT enquiries) may need support to do this work.
- The outcomes agreed with the person include multiple strands – e.g. disciplinary, criminal, and regulatory, etc. It is essential that all agencies are clear about how the enquiries will dovetail/overlap to avoid duplication or contamination of evidence. This is likely to be the case in complex organisational abuse cases.

What is expected of me?

You have a number of rights and responsibilities as detailed below.

Rights:

- To be involved in agreeing a suitable date/time for the meeting. This may require you to prioritise attendance over other diary commitments if the risks to the adult(s) are significant.
- To have sight of the concern and/or face to face form (or a summary) in advance of the meeting.
- To have sight of an agenda (before or at the meeting).
- To seek clarification of your role and obtain support, either from a safeguarding lead in your organisation or from a manager within Adult Social Care.

Responsibilities:

- To attend if you/your organisation has been identified as the primary agency to meet the adults' outcomes.
- To provide relevant data to the meeting to inform the risk assessment and planning process.
- To complete actions agreed at the meeting in a timely manner. If this is not possible, to share this with the adult/Safeguarding Manager as soon as possible.
- To produce a transparent and accessible report, on the template provided, to support exit either at planning or outcome stage.
- To share your report with the adult or their advocate in advance of the outcome meeting or virtual outcome meeting.

Who will attend a planning meeting?

Purpose of a planning meeting. V2 approved P&P December 2018. Review December 2019

Attendees can include:

- The adult and their support or advocate if they are unable /unwilling to attend.
- A Safeguarding Manager who will chair the meeting using the agenda.
- A minute taker (if a formal meeting is required).
- Representatives from agencies who will assist the adult to achieve their agreed outcomes.
- Specialist services, if required to provide advice e.g. legal, health and safety etc.

How long will it last?

Depending on the complexity of the case and whether or not the adult requires interpretation services anything from 45 minutes to two hours. At the point of invitation the time commitment should be made clear.

What if I can't help the adult achieve their outcomes, do I still need to attend?

If you /your organisation has information that will assist us to reduce the risks or to discuss the risks with the adult and we have not had this information from you in advance of the meeting, we may ask you to put this in a report to the meeting. In most cases this will be shared with the adult (some exceptions to this exist, if you would like to clarify please discuss with the Safeguarding Manager).

If the report provides all the information needed you will not be asked to attend the meeting.

More questions?

- Talk to the Safeguarding Manager or the worker leading on the enquiry.
- Look at the South Yorkshire Safeguarding Adults Procedures.
- Talk to your safeguarding adults' lead, if you have one.
- Talk to the Safeguarding Adults Board Manager – Cath Erine.