

Appendix E — Social-Worker Review Meeting Pack

Joe Gleason · Advance review draft 3.7 — October 2026

Arrive prepared, leave with an understood next step

Use with: Chapters 4, 9, and 11.

This pack follows the recurring meeting’s purpose: hear different accounts, preserve uncertainty, agree appropriate actions, and review whether the support helped. A social worker may facilitate within their role; clinical questions stay with the appropriate clinicians.

E1. Prepare the conversation

Field	What to bring
The person’s priorities	What they want to discuss or decide, and how they wish to take part.
The caregiver’s priorities	Their needs and questions, with a separate route for matters not appropriate for the shared meeting.
Chosen participants	Who is invited, for what role, and with what appropriate permission.
Relevant accounts	Dated, attributed observations and reports; identify where people describe the situation differently.
Professional guidance	Current, relevant instructions and the professional responsible for them.
Decisions and open questions	What might be agreed today, what requires someone else, and what will not be decided here.

Field	What to bring
Access and preparation	Language assistance, format, timing, accessibility, and any support needed to participate comfortably.

Use the familiar rhythm: **notice** → **ask** → **understand together** → **agree** → **support** → **review**. A concern needing prompt professional attention follows its appropriate route; it does not wait for the next routine meeting.

If AI helps prepare a draft, label the sources and review it before the conversation. Conflicting accounts are information to discuss, not a problem for the assistant to erase.

Select meeting evidence from the shared plan, not automatically from the caregiver's private assessment. Obtain the relevant authorization for any specific disclosure; a shared meeting invitation is not blanket access to individual-session records. See Chapter 11 and Appendix C.

E2. The meeting closeout

For each decision, record **what was agreed; by whom; what remains unresolved; the person accepting the next action; the due or review point; who may receive the summary; and how an error can be corrected**.

A proposed closing question is:

Before we finish, is anything in this summary different from what you understood? What is the next thing each of us has actually agreed to do?

Do not label a conversation successful merely because nobody objected. Offer a suitable route for later questions. An unanswered concern retains a responsible follow-up route, not an empty field.

E3. Separate staff and volunteer support plan

For the people delivering the service, record **the work expected; time and staffing required; preparation or supervision needed; the person who responds when help is needed; absence coverage; work that can be removed or shared; and the date for reviewing workload and usefulness**.

Keep this separate from family-private records. Ask staff and volunteers what the process makes easier or harder, and how they want useful contributions acknowledged. Support is not a hidden individual ranking. This develops Chapter 11's separate staff-support plan.

Decision this tool supports: What have people understood and accepted, and what support makes those commitments realistic?