



# Learning Review

Operational procedure for Child Protection Committee and Adult Protection Committee

## Document information

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## LEARNING REVIEW INTRODUCTION

Falkirk's Adult Protection Committee and Child Protection Committee are committed to continuous learning and improvement across all services that support children, young people, adults at risk, and their families. Learning Reviews are an essential part of that approach. They provide opportunities to understand and reflect on what happened in complex or serious cases, identify what is working well, and determine what can be improved to strengthen local systems, processes, and practice.

This operational procedure sets out a clear and consistent approach for Learning Reviews across Falkirk's Child Protection Committee (CPC) and Adult Protection Committee (APC). It aligns and builds on national guidance for Learning Reviews. Through our application of this we have recognised that local procedure will help support all levels of the workforce with their role and responsibilities related to Learning Reviews. Our approach is underpinned by principles of openness, partnership, and shared accountability shaped by the Six Principles of Safeguarding. (Empowerment, Prevention, Proportionality, Protection, Partnership, Accountability, Department of Health, 2011).

Falkirk Child Protection Committee (CPC) and Adult Protection Committee (APC) are committed to ensuring that all Learning Review activity is inclusive, accessible, and trauma informed. This procedure supports compliance with the Equality Act 2010 and the Public Sector Equality Duty, promoting fairness, respect, and participation for all children, adults, families, and staff. Information and communication will be provided in clear, accessible formats to meet individual needs.

## BACKGROUND AND CONTEXT

Learning Reviews were introduced nationally to replace earlier models such as Significant Case Reviews (SCRs) and Initial Case Reviews (ICRs). This change reflects a shift in emphasis from retrospective scrutiny and individual accountability to collective learning and system improvement.

Across Scotland, Learning Reviews are now recognised as a central mechanism for improving outcomes in child and adult protection. They enable local partnerships to:

- Analyse the circumstances and professional responses in cases where harm, neglect, or risk of significant harm has occurred.
- Identify key learning about how local systems and inter-agency processes function in practice.
- Strengthen joint working and ensure continuous improvement across services.

The National Guidance for Child Protection in Scotland (2021) and the [National Guidance for Child Protection Committees Undertaking Learning Reviews](#) (2021) requires Child Protection Committees to consider a Learning Review when a child or young person has died or been significantly harmed, and where it appears there may be multi-agency learning to support improved practice.

Similarly, under the Adult Support and Protection (Scotland) Act 2007, Adult Protection Committees must review cases where an adult at risk has died or experienced serious harm, and where learning could enhance protection arrangements for others. The 2023 [National Adult Support and Protection Learning Review Guidance](#) established a consistent, proportionate, and learning-focused framework for such reviews.

Both frameworks emphasise collaboration, transparency, and inclusion, recognising the importance of hearing from families, carers, and staff affected by the circumstances of the case. Learning Reviews also contribute to national learning through the Care Inspectorate's National Hub for Reviewing and Learning from Practice, which collates findings and share's themes to support system-level improvement across Scotland.

Learning Reviews are a key part of Scotland's public protection framework. They are designed to promote system-wide learning and improvement following serious incidents where a child or adult at risk has been harmed or has died. Increasingly, Child and Adult Protection Committees collaborate on joint Learning Reviews where cases involve both child and adult services or where systemic learning spans both domains. Where cases involve both children and adults at risk, or where the circumstances and learning cut across age or service boundaries, Falkirk's CPC and APC will work together to undertake a Joint Learning Review. This approach supports holistic, whole-family learning and reflects the interdependencies between services supporting children, adults, and families.

The overall purpose of a Learning Review is to bring together agencies, individuals and families in a collective endeavour to learn from what has happened to improve and develop systems and practice in the future and thus better protect children and young people.

Learning Reviews are not investigations. They are an opportunity for in-depth analysis and critical reflection to gain greater understanding of inevitably complex situations and to develop strategies to support practice and improve systems across agencies. It is important, therefore, to create and sustain a positive shared learning culture throughout the process of the Review

A streamlined, flexible and proportionate approach to reviewing and learning from what are inevitably complex cases is needed.

## STEP 1 – All services being Learning Review Informed

It is vitally important that all partner organisations are Learning Review informed.

### 1.1 Recognising significant cases across agencies

Our committees are supported by membership from a wide range of partners who contribute and collaborate towards our mission to make Falkirk a place where everyone feels safe. All members need to ensure that their staff are Learning Review informed to allow the identification of significant cases and internal decision making about Learning Review notifications. The criteria for Learning Review is set out for both committees in the following section, all organisations must ensure that their staff are informed and familiar with this.

### 1.2 Criteria for undertaking a Learning Review

Any partner agency can request that a case be considered for review by the Child or Adult Protection Committee where they consider the criteria for review is met. The agency should refer the circumstances for committee consideration at the earliest opportunity.

The Child Protection Committee will undertake a Learning Review in the following circumstances:	The Adult Protection Committee will undertake a Learning Review if the following criteria is met:
<p><b>When a child has died or has sustained significant harm or risk of significant harm as defined in the <a href="#">National Guidance for Child Protection in Scotland 2021</a></b></p> <p><b>and</b> there is additional learning to be gained from a review being held that may inform improvements in the protection of children and young people</p> <p><b>and</b> one or more of the following apply:</p>	<p><b>1.</b> Where the adult is, or was, subject to adult support and protection processes and the incident or accumulation of incidents gives rise to reasonable cause for concern about how professionals and services worked together to protect the adult from harm, and one or more of the following apply:</p> <p><b>(i)</b> The adult at risk of harm dies and</p> <ul style="list-style-type: none"><li>• harm or neglect is known or suspected to be a factor in the adult's death;</li><li>• the death is by suicide or accidental death;</li></ul>

- abuse or neglect is known or suspected to be a factor in the child's death or the sustaining of or risk of significant harm
- the child is on, or has been on, the Child Protection Register (CPR) or a sibling is or was on the CPR or was a care experienced child or was receiving aftercare or continuing care from the local authority. This is regardless of whether or not abuse or neglect is known or suspected to be a factor in the child's death or sustaining of significant harm, unless it is absolutely clear to the Child Protection Committee that the child having been on the CPR or looked after has no bearing on the case
- the child's death is by suicide, alleged murder, culpable homicide, reckless conduct, or act of violence and one or more from the above apply

**and** there is additional learning to be gained from a review being held that will lead to improvements in the protection of children and young people.

Learning Reviews may also be undertaken where effective working has taken place and outstanding positive learning can be gained to improve practice in promoting the protection of children and young people.

This criteria does not preclude a CPC reviewing the death of a child pre-birth.

- the death is by alleged murder, culpable homicide, reckless conduct, or act of violence or

**(ii)** The adult at risk of harm has not died but is believed to have experienced serious abuse or neglect.

**2.** Where the adult who died or sustained serious harm was not subject to adult support and protection processes

**(i)** When the findings of an inquiry or review by another organisation or court proceedings, or a referral from another organisation gives rise to reasonable cause for concern about lack of involvement in relation to the Adult Support and Protection (Scotland) Act 2007; or

**(ii)** The Adult Protection Committee determines there may be learning to be gained through conducting a Learning Review.

## STEP 2 – Learning Review Notifications

Both committees have an established Learning Review sub-group who have enhanced knowledge and skill in Learning Reviews. It is expected that this operational procedure will support them with these functions, roles and responsibilities.

### 2.1 Committee working groups for Learning Reviews

Each sub-group has a terms of reference which sets out their purpose, objectives, functions, membership and membership responsibilities. The terms of reference will be regularly reviewed by the group as adherence to it is vitally important to the effective management of good quality Learning Reviews, including:

- We conduct learning reviews when required in line with national guidance.
- We swiftly implement improvements identified and measure their impact.
- We effectively communicate and promote their learning points across our partnership.

### 2.2 How to submit a Learning Review notification

One of the core responsibilities of the sub-groups is receiving and reviewing Learning Review notifications from partner agencies.

Any member of either Committee, agency, or practitioner who believes that a case meets the criteria for a Learning Review may raise a concern and submit a notification. Our shared *Notification Form* is available at [Appendix 1](#).

It must be submitted to the CPC or APC Lead Officer using the following email addresses

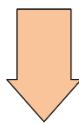
[ChildProtectionCommittee@falkirk.gov.uk](mailto:ChildProtectionCommittee@falkirk.gov.uk)

[asptraining@falkirk.gov.uk](mailto:asptraining@falkirk.gov.uk)

Notifications are the start of the Learning Review process which is set out for each committee below from national guidance.

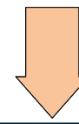
## STEP 1 - Recognition of Significant Case

Identifying agency reviews case against criteria and decides whether to make a notification to APC/CPC



## STEP 6 - Undertaking a learning review

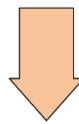
Deliver review team activities as set out in terms of reference including chronology development, review team meetings, family liaison, practitioner and manager involvement  
Support Reviewer in identifying themes, systems learning, and potential practice improvements



## STEP 2 - Notification Form received by Learning Review Subgroup

To be reviewed by the learning review screening meeting within 5 working days with decision being made on whether to proceed to the next step based on learning review criteria

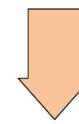
Any necessary immediate actions agreed and taken forward



## STEP 7 - Reporting the findings of the learning review

Lead reviewer/s draft final report including executive summary  
Review team meet to review and discuss the final report

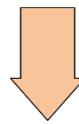
Agree any amendment to the report based on the analysis of the facts, practice and organisational learning, effective practice and the suggested strategies for improving practice and systems  
Necessary notifications completed - involved partners, Chief Officers and Care Inspectorate



## STEP 3 - Multiagency Report Writing for Learning Review Notifications

Agency Leads to support the return of partner agency reports checking for quality and return within 10 working days

Further immediate actions must be considered and taken forward



## STEP 4 - Learning Review Subgroup Decision and Recommendation to APC/CPC

Subgroup consider the information gathered and decide whether to proceed within 4 weeks

Subgroup outline their decision and recommendations regarding the tier of review

APC/CPC consider the recommendation and make a decision about undertaking a learning review  
Necessary notifications completed - involved partners, Chief Officers and Care Inspectorate

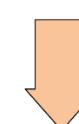


## STEP 5 - Review Terms of Reference including staff support and family liaison

Consider the approach for the review and set this out in terms of reference

Review Team is set up and where applicable commissioning reviewer

Plan the key activities to be undertaken, roles and responsibilities and timescales



## STEP 10 - Sustaining the Learning

Monitoring and evaluation of improvements using a variety of methods set out in the improvement plan  
Agree long term monitoring e.g. key performance indicators, staff confidence surveys, audit and stakeholder feedback

## 2.3 Concerns about making Learning Review notifications

It's important to acknowledge that reviewing significant cases where we think there may be learning can cause worry and anxiety for individual practitioners and partner agencies, we all come to work to do our best for the individuals and communities we serve. We are committed to undertaking Learning Reviews applying essential core principles that create the preconditions for learning. Our focus is on collectively taking sufficient time to explore the why and how something happened alongside the what, ensuring these is a focus on the conditions in which practice occurs.

- **Reviews must be inclusive, multi-agency, and proportionate, with systemic learning as the primary aim.**

Learning Reviews are not investigations. They provide an opportunity for thorough analysis and critical reflection to deepen understanding of complex situations and identify ways to strengthen practice and improve systems across agencies. Reviews will maintain a focus on the factors that enabled or constrained decision-making, considered within the wider organisational and systemic context. The final report will address systemic and multi-agency issues and will not attribute findings to the practice of individual practitioners.

- **A culture of collective accountability and psychological safety is promoted.**

Reviewing complex situations can understandably generate anxiety among individuals and organisations. This anxiety may lead to defensiveness, which can hinder open reflection and learning. To enable meaningful learning, it is vital that everyone involved in the review process feels safe, supported, and respected. A sense of psychological safety allows participants to reflect honestly, explore what happened, and engage in constructive questioning and challenge. We will take time to create spaces where all partners, staff, and families feel safe to contribute views without fear of criticism. Establish clear ground rules and set expectations for confidentiality, respectful communication, and constructive challenge in all review activity and communicate back to participants how their input has been used and what changes will follow.

- **Effective leadership is essential in creating the conditions that enable meaningful learning.**

Chief Officers, who hold overall accountability for the work of both the Child Protection Committee and Adult Protection Committee, have a key role in championing and supporting local and national learning and improvement activity to strengthen the support and protection of children and adults. They must provide clear leadership and direction regarding the importance and implementation of Learning Reviews.

- Learning is shared across adult and child protection systems, wider partnerships (e.g. Gender Based Violence, Community Justice), and with the third sector.

We will use existing partnership forums to share learning to ensure there is effective alignment and reach. The Public Protection Lead Officers Group (PPLOG) will support cross sector learning events to encourage dialogue across professional and organisational boundaries.

## **2.4 Learning Review screening meeting**

A screening meeting is convened to consider all notifications of potential Learning Reviews received by the Child Protection Committee (CPC) or Adult Protection Committee (APC). The meeting will be convened within 5 working days of notification. Its role is to:

- ensure that each notification is considered in a timely, proportionate and consistent manner.
- determine whether the criteria for a Learning Review are likely to be met in line with National Guidance.
- Agree steps required to prepare the notification papers for the subgroups
- Identify if any immediate action is required, including actions to support staff wellbeing and media interest.
- Manage any disagreements

The Screening Panel will normally include:

- Committee Chair (CPC or APC)
- Lead Officer
- Senior representatives from key partner agencies (Social Work, Health, Police and Education in Child Protection).
- The submitting agency will present the case to partners

Screening Panels should be multi-agency, concise, and evidence-informed, avoiding duplication with other governance processes. Learning from screening decisions (e.g. themes in non-proceeded cases) should also feed into the CPC/APC.

## STEP 3 – Multiagency report writing for Learning Review Notifications

Good quality information sharing at notification point ensures that we are reviewing factual information to inform learning.

### 3.1 Partner Agency Report Requests

On receipt of this notification and following the screening panel, the Lead Officer should request further information from agencies involved or who may support the understanding of the situation. This is carried out using the shared *Partner Agency Request for Information Form* available at [Appendix 2](#).

Agency leads must ensure the staff member nominated to produce the report is Learning Review informed, they must check the review quality prior to submission.

The purpose of information gathering at this stage is to decide about whether to proceed with a Learning Review with reference to the criteria as specified in section 1.2 and therefore the data gathered should be only enough to make that decision. It will include a brief account of agency involvement prior to the event which triggered the notification and some initial reflection regarding practice and decision-making within that agency and some key chronological events. The sub-group will then review the notification, and additional partner information. They will discuss and check against threshold criteria. They will provide some initial analysis of the key issues to explore. Notifications that crosscut multiple groups should trigger a joint CP and AP learning review subgroup meeting to ensure coordinated, efficient, and transparent consideration of the case.

### 3.2 Immediate actions

Through these initial steps partners agencies will be considering any immediate action they need to take linked to systems and practices. These should be detailed fully in the report template.

### 3.3 Staff communication

Each partner agency should discuss and agree responsibility for manager communication with their staff group regarding a notification being received, Learning Review core principles and next steps. Route for support during these steps should be made clear to ensure staff are supported with any worry or anxiety they may be experiencing.

## STEP 4 – Notification Decision and tiered recommendation for Committee

Subgroups are supported by Learning Review tiers which provide proportionality to decision making.

### 4.1 Learning Review Subgroup Decision and Recommendation

A decision will be made within 20 working days of the notification being received with rationale recorded and the referrer notified of the decision.

A recommendation will then be made to Committee on whether a Learning Review should proceed and at what level. Our shared *Learning Review Decision and Recommendation Form* is available at [Appendix 3](#). This form includes:

- A summary of the case and the rationale for referral
- Details of the current circumstances of the child/adult and family/carer, including any actions already taken
- Information on any formal processes underway, such as criminal investigations or ongoing criminal proceedings

The committee's decision on whether to proceed with a Learning Review will be further documented using the same form following their meeting.

### 4.2 Tier of Learning Review

An important part of the recommendation, if the recommendation is to undertake a Learning Review, is a what tier. Learning Reviews must be proportionate, cases will be diverse, and this therefore require a proportionate approach to ensure effective learning at the right pace and with the right degree of independent review.

### 4.3 3-Tiered Approach

Chief Officers have agreed a 3-tiered approach set out below. These tiers ensure that the activity remains grounded and in line with the underlying principles and values set out in National Guidance.

Tier 1	A multi-agency professional workshop for cases with a shorter process to allow swift implementation of learning
Tier 2	Internal Learning Review which requires more time and activities which may include individual practitioner conversations and family engagement.
Tier 3	External Learning Review which requires more time and activities with individual practitioner conversations and family engagement.

### 4.4 Learning Review Key Performance Indicators (KPI):

We recognise the importance of responding to notifications consistently and that learning takes place without delay. Corresponding to the tiered approach. Key Performance Indicators will be reported annually to COG. These are set out below:

KPI 1	Our Learning Review working groups will discuss notifications within 4 weeks of receiving them.
KPI 2	APC/CPC will complete Tier 1 Learning Reviews within 1 quarter reporting period
KPI 3	APC/CPC will complete Tier 2 Learning Reviews within 2 quarter reporting periods.
KPI 4	APC/CPC will complete Tier 3 Learning Reviews within 3 quarter reporting periods

### 4.5 Committee Notifications

At this step committee is responsible for 3 separate notifications:

- The source of the notification and all agencies who provided information will be notified of the decision and recommendation.
- The Public Protection Chief Officers Group (PPCOG) will be notified of the Learning Review decision including tier and associated timescale.
- The Care Inspectorate will be notified of our decision through their online notification system [HERE](#)

The Care Inspectorate act as a central collation point for the notification of decisions for proceeding or not proceeding to a Learning Review taken by CPCs and APC's, in order to better understand the rationale and application of guidance nationally.

#### **4.6 Additional Sub-group Considerations**

Due to the multiagency nature of our work and the individual unique circumstances of the adults, children and families that we work with there can often be alternative and parallel pathways we need to consider.

The Learning Review sub-group should always assess:

- Whether the circumstances meet the threshold for a Learning Review
- Whether another process is already underway or would be more appropriate, for example suicide or substance use death review; and
- How multiple processes can be sequenced or aligned to avoid duplication or conflict.

Where more than one process applies, the Chairs of the CPC, APC, or relevant partnership (e.g. MAPPA, Alcohol and Drug Partnership, Gender Based Violence Partnership) should agree on:

- The lead process
- The points of interface between reviews
- How learning will be shared and consolidated into a single improvement framework.

#### **4.7 Joint Child and Adult Protection Learning Reviews**

A joint Learning Review can be effective when a case spans both systems (for example, transitions, parental risk, adults at risk who are also carers, or whole-family safeguarding concerns).

In these circumstances one lead reviewer will be appointed, but both committees will be engaged with the process. A single set of terms of reference should be drafted, setting out the scope, governance, and responsibilities of both Committees.

The joint Terms of Reference will reflect:

- The needs of both the child and adult(s)
- The interactions between services

- Any systemic safeguarding issues and cross cutting themes

A single joint report will be produced with findings and recommendations relevant to both protection systems.

If joint reviews are not feasible or appropriate, CPC and APC reviews will:

- Share timelines
- Align findings
- Hold a joint learning event if appropriate

## **STEP 5 – Learning Review Terms of Reference including Family Liaison and Staff Wellbeing**

A well-planned Learning Review enables us to deliver across all essential core principles that create the preconditions for reflection and learning. It produces accurate findings and inclusive and supportive experiences for all involved.

### **5.1 Learning Review Terms of Reference (TOR)**

The TOR will be a guiding statement which defines the scope and activities of the Learning Review.

It will detail the Review Team established by committee including:

- Lead Reviewer
- Review Team Members including chair
- Administrator/Support

It is vitally important that each member is aware of their role and responsibilities as active members of the Review Team, and they review their respective national guidance to support them to fulfil their role fully. Learning Reviews are comprehensive and demanding in terms of workload and can test our emotional resilience. It's important that the activities are shared across the Review Team.

It will set out:

- The family liaison strategies and leads for this
- Parallel legal processes
- Timescales
- Key review activities
- Media considerations

A shared template for Learning Review TOR is available at [Appendix 5](#).

A guide to Learning Review Timetables – Tier 1, 2 and 3 is available at [Appendix 6](#).

## 5.2 Process of Identifying Reviewers

The process for identifying a suitable and competent lead reviewer/s involves several key steps. The Learning Review subgroup will provide a view to CPC/APC whether the Learning Review should be undertaken by an internal or external reviewer relevant to the recommended tier.

The following information is important to consider for the identification of a Lead reviewer/s

- Independence (especially for external reviewers).
- Experience in undertaking reviews
- Subject matter expertise (e.g. gender-based violence, use of the law, neglect, multi-agency practice).
- Good working knowledge of national guidance
- Training in Learning Review methodology and techniques
- Ability to complete required work, especially the final report, within our timescales

Deciding whether an internal or external review is commissioned is generally based on complexity, risk, and availability within the partnership. CPC and APC will make a recommendation and, having considered the information available inform Chief Officers Group.

If the recommendation from CPC/APC is to carry out a Learning Review in tier 3 then the role of Lead Reviewer will be advertised via MyJobScotland working with the Councils HR department.

The Council has developed an external lead reviewer contract which sets out the reviewer's offer, terms of reference and schedule. This can be adapted for each review.

The Council, Health Board, Police Scotland and education where appropriate will jointly fund the fee of the external reviewer. This will be set out and detailed in their contract and will include time to complete review work and expenses for materials and travel.

The Review Team should convene an extraordinary meeting should they need to consider contingency arrangements, revision to the review terms of reference or use of the contact if, for example, unexpected events interrupt the reviewer's ability to deliver on the contact.

## **5.2 Family Liaison**

### **Purpose and Principles**

Learning Reviews recognise the central role of families in understanding the child or adults lived experience. Their involvement is therefore integral to overall learning from what has happened to protect people in the future. The purpose of engaging with families will explore their perspective and views on the professionals, services and decision making in their lives.

Families' engagement with the process is voluntary, with informed consent and with clear communication about the process. Engagement with families should be respectful, compassionate, and trauma informed.

### **Initial Contact and Consent**

Family Liaison should be discussed by the subgroup and initial thoughts shared with respective committees. The Review Team will have responsibility in developing a Family Liaison strategy to ensure that the family are included in the process in a planned and structured way. The family should be contacted early in the Learning Review process however where there are ongoing criminal investigations feedback on any planned family engagement should be gathered from the Crown and Procurator and Fiscal Service (COPFS). [\*\*Appendix 4\*\*](#) should be used for gathering advice from COPFS for Learning Reviews for the CPC.

A shared template for a family liaison strategy is available at [\*\*Appendix 7\*\*](#), as with the review TOR this is a living document and should be reviewed and updated in line with the family's needs and wishes.

In some cases, where there is an ongoing criminal investigation a Police Family Liaison Officer may have been appointed. If a Learning Review is to take place in such a situation, then the Police Family Liaison Officer should be invited to meet with the Review Team, before any contact with the family, to help plan and support the Learning Review Family Liaison Strategy.

The Review Team should decide who is best placed to make initial contact with the family, this could be a trusted professional, allocated worker, advocate, Review Team Chair or designated lead.

When making initial contact with family the following information would be considered to be shared.

- Purpose of the Learning Review.
- What participation involves.
- How their views will be used.
- Assurance of confidentiality and sensitivity.
- Obtain written or recorded verbal consent for participation.

\*\*Please note – feedback from COPFS will dictate any parameters that may require to be put in place with regards to how the family are engaged in the process.

It is important to consider that each family or family member will require a tailored approach, this needs to consider the family's needs, preferences, and circumstances (e.g. language, trauma, bereavement). During the process the Review Team need to ensure that trauma informed practice is utilised at all times. Any interaction should avoid re-traumatisation by being sensitive to grief and loss and provide transparency.

Engagement can take place in variety of ways and must provide flexibility in to how the families choose and when to engage.

Engagement may take place in the following ways:

- One-to-one interviews.
- Written submissions.
- Participation in review meetings (if appropriate)

Family members should be kept informed of the progress of the review.

Information for families is available at [Appendix 8](#).

## Sharing Findings

Prior to any publication the findings should be shared with families where possible, allowing for time for feedback. This must be done with sensitivity and with care, recognising that the family may not agree with all aspects of the Review's findings. Providing feedback can serve several purposes for families. It may offer validation, understanding, or reassurance, but it may also evoke distress or painful memories. Where appropriate, professional support should be available to family members throughout this stage

In terms of the final report anonymity will be provided and any decision about publication by the committees will be underpinned by any potential impact on the families. It is good practice to offer a plain-English summary and encourage independent advocacy support

Families should be provided with opportunities to ask questions and support offered in understanding outcomes and next steps.

Gathering feedback from families on their experience of the review process is imperative to continuous improvement and feedback should be discussed within the working group and shared with Committees to inform and improve future Learning Reviews.

## Whole Family Lens

Learning Reviews will be undertaken using a whole-family perspective, recognising the interconnected needs, risks, and strengths that exist within family systems. This approach ensures that children, young people, adults at risk, and those who care for them are considered together, rather than in isolation. A whole-family lens acknowledges the ways in which parental circumstances (such as domestic abuse, substance use, mental health, or poverty) can directly affect children's safety and wellbeing, and equally, how children's needs and experiences may impact on parents and carers.

By adopting this perspective, the review will seek to understand how services across child protection, adult protection, and wider community supports responded to the family as a whole, and whether opportunities for earlier or more effective joint intervention were missed. This includes examining how information was shared, how assessments took account of family relationships and dynamics, and how agencies worked together to coordinate support.

The final analysis will highlight lessons that strengthen practice across both children's and adults' systems, supporting more integrated, trauma-informed, and family-centred approaches to protection and care.

### 5.3 Staff Wellbeing and Support

Working in frontline practice, particularly across public protection can be both a challenging and highly rewarding role. By its very nature working with those presenting with several vulnerabilities can be complex and at times can lead to stress within the workplace. If left unmanaged, it can affect health, productivity, and wellbeing.

Falkirk Child and Adult Protection Committees recognise being involved in Learning Review can be one of these times when staff can feel worried or stressed. Staff will be supported throughout the Learning Review process by ensuring clear and timely communication about its purpose, scope, and approach. The review will be conducted within a framework of psychological safety, emphasising learning rather than blame. Staff will have access to line management, supervision, and wellbeing support as required, and opportunities to contribute through a range of formats that best suit their circumstances. Skilled facilitation will be used to create a safe and respectful environment for participation. Staff will also receive feedback on how their input has informed the review, with follow-up support available to reinforce learning and promote a culture of collective improvement.

- Named leads from each agency will ensure individual support, supervision, and/or debriefing is available.
- HR, trade unions, and staff well-being services will be signposted as part of an agreed support plan.

This work will be set out and detailed in the review terms of reference. All staff will be issued *Information for Review Participants* available at [Appendix 9](#). All practitioners should receive clear communications and be reminded of the supports and tools available locally and on the National Wellbeing Hub.

#### [Supporting staff wellbeing: Falkirk Council's Employee Assistance Programme](#)

#### [Home - National Wellbeing Hub](#)

### 5.4 Wellbeing Workshops

The Review Team should collaborate with NHS Forth Valley's Psychological Services to offer choice and provide wellbeing workshops to participants prior to their attendance at Learning Review sessions. These preparatory workshops should be designed to provide participants with optimal conditions to support their psychological and emotional wellbeing during sessions and identify whether there is a need to offer access to more individualised support.

The session content and the process of delivery should be designed to increase insight and awareness, individually and collectively, to:

- assist participants in taking care of themselves by making sense of their psychological and emotional experiences – from a psychological trauma and emotional perspective.
- sensitively support workshop participants to reflect and share.
- promote a sense of collective learning and togetherness in the task ahead.
- focusing on psychological safety: listening, respecting different perspectives, treating everyone with dignity and respect.

## STEP 6 – Undertaking a Learning Review

A Learning Review must focus on understanding how people saw things at the time, why things happened as they did, what belief systems were operating and how capabilities and capacity were affected by the roles and positions adopted by family members and other professionals, together with the emotional impact of the work and the resources available. It's a collective endeavour that must adopt a systemic approach.

### 6.2 Review Team Meetings

The Review Team is established once the Committee (CPC/APC) agrees that a Learning Review will proceed. The Review Team oversees the planning, coordination and conduct of the Learning Review ensuring that it is proportionate and conducted in line with the national guidance. The Review Team also must ensure the review is inclusive of practitioner, senior managers and family perspectives and that the review is focused on learning and improvement. The Review Team's role within the Learning Review process can be viewed within [Appendix 5](#).

Key Activities by Stage	
Stage	Learning Review Team Responsibilities
Set-up	Confirm Terms of Reference, identify key contacts, plan practitioner and family engagement and support. Identify Practitioners and Senior managers for events. Review feedback from COPFS if ongoing criminal proceedings.
Information Gathering	Oversee collation of agency chronologies ensure quality and consistency, identify any gaps.
Analysis	Support Reviewer in identifying themes, systems learning, and potential practice improvements.

Draft Report	Review emerging findings, ensure accuracy and confirm that the tone remains learning focused.
Finalisation	Recommend final report for CPC/APC sign-off

Each of the Review Team meetings will be minuted by the dedicated administrative support team member. Minutes and actions will be recorded, shared with each of the review team members and retained securely.

### 6.3 Practitioner Events

A key feature of the Learning Review is the Practitioner event. These events provide a safe and supported space for those directly involved in the case. They bring together multi-agency practitioners to ensure their voices directly inform the review. The event is not investigatory, it provides an opportunity for collective reflection on practitioner involvement, analysis of key events and decisions. It is also an opportunity to identify key learning and effective practice. The focus is on understanding what happened, why it happened and what can be learned to strengthen future practice. Staff participation in these events may be impacted by ongoing criminal proceedings therefore on going liaison with COPFS remains essential to ensure effective coordination, information sharing, and compliance with legal processes. [\*\*\(Appendix 4 for CPC\)\*\*](#)

The event is facilitated by the Lead Reviewer with support from the Lead Officer and Review Team Chair. Invitations to the event will be issued by the Lead Officer and administrative support.

Participants should be supported to understand the function of the practitioner event and their role within in it. Their agency representatives within the Review Team will be the conduit between the review and the practitioner. Practitioners involved in the event should receive the pre meeting information communication [\*\*\(Appendix 9\)\*\*](#).

It is equally important that the practitioner events take place in a neutral, safe and comfortable setting.

The Lead Reviewer should prepare a summary note or thematic analysis of the event and participants will receive feedback on how their contributions informed learning and improvement.

## 6.4 Senior Manager Event

The Senior Manager event brings together senior operational and strategic managers from all relevant partner agencies to collectively reflect on the findings emerging from the review.

The event provides a structured opportunity to:

- Consider the systems and organisational factors that influenced practice
- Reflect on leadership, supervision, governance, and resource implications
- Identify opportunities to embed learning and strengthen inter-agency working
- Agree practical and sustainable improvement actions at strategic level

The event is designed to promote ownership of learning across all partner agencies and ensure that the reviews findings are understood at a senior level. Enable reflection on whether organisational structures, cultures or processes contributed to challenges identified in practice. The event should also recognise where effective leadership and practice supported good outcomes. The involvement of Senior managers strengthens accountability and collective leadership for implementing learning and monitoring impact over time.

## STEP 7 – Reporting the findings of a Learning Review

The findings of the report need to be brought together into a coherent whole.

### 7.1 Drafting of the final report

The report will include information on:

- An introduction which will provide a synopsis of the circumstances that led to the review.
- The child/adults' background, family, support and environment
- The review process – including outline of the tier, Review Team, family involvement and key activities undertaken
- The facts of the case
- Analysis of the facts
- Practice and organisational learning
- Effective practice

- Suggested strategies for improving practice and systems
- Appendices

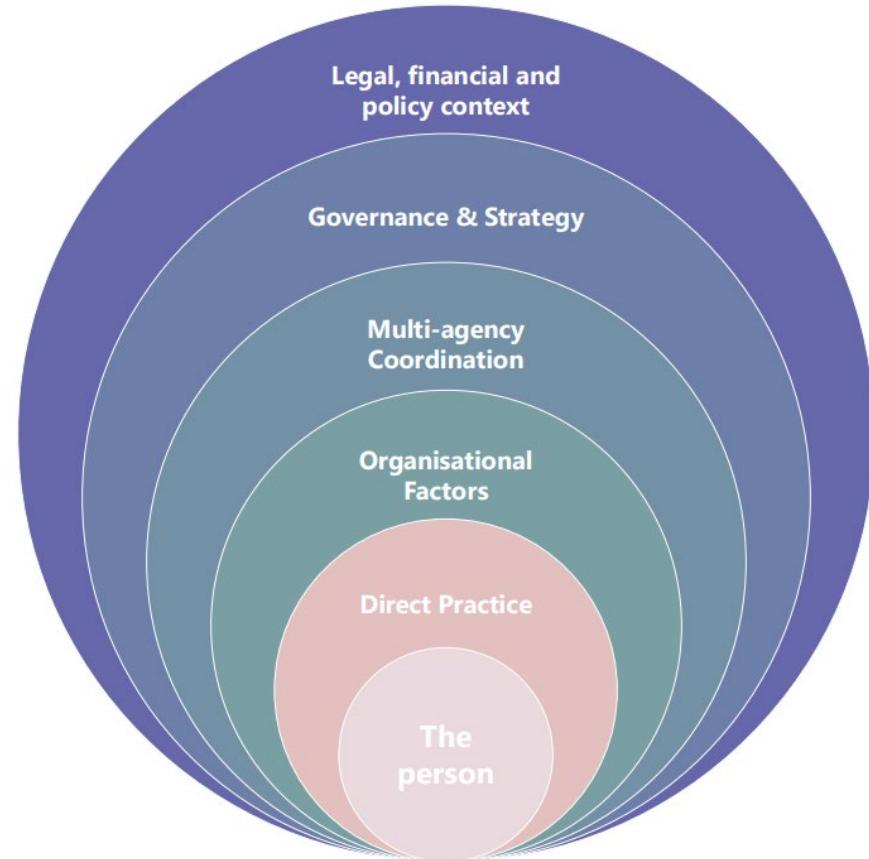
It is highly recommended that drafting of the report commences from Review Team meeting 1 and is updated and brought together as the review progresses. The time required for bringing complex cases together, analysis and formulating strategies for improvement should not be underestimated. The Review Team will have a key role in encouraging this approach with the lead reviewer, who is responsible for drafting the report, from the outset.

Our shared Learning Review report template is available at [Appendix 10](#).

## **7.2 A whole systems approach to identifying learning**

Systems thinking focuses on the interaction between people, processes, and structures. Our report recommendations need to include or consider the need for learning at the macro level of government, policy and legislation level as well as at local and organisational level. Some examples are listed below:

- Good frontline practice is legally literate, curious, non-judgemental and person-centred.
- Organisations must support their staff to do this by providing good quality learning and development, supervision and physical environments.
- Agencies must work together and create partnerships where staff can work creatively and flexibly.
- APCs and CPCs must ensure they are collecting the right data, setting strong strategic priorities and improving needs data about their communities.
- Law and policy need to enable all of this to happen equitably.



### 7.3 Committee Notifications

The Care Inspectorate will be notified of the Learning Review findings through their online notification system [HERE](#)

The full report will be submitted to [cistrategicteamnotification@careinspectorate.gov.scot](mailto:cistrategicteamnotification@careinspectorate.gov.scot)

The Care Inspectorate act as a central collation point for all Learning Reviews completed across Scotland at the point at which they are concluded. They identify themes, aspects of good practice and learning opportunities to share nationally. They also provide COGs and CPCs and APCs with observations on the Learning Review report; the quality of the Learning Review

undertaken and will discuss with partnership how the learning will be shared and implemented. This will take place in a feedback meeting scheduled by the Care Inspectorate and additionally through link inspector discussion.

## **STEP 8 – Improvement Planning for suggested strategies for improving practice and systems**

Improvement planning for Learning Reviews benefits from a structured, reflective, and collaborative approach.

### **8.1 Improvement planning strategies**

Several strategies can be utilised to formulate the suggested strategies for improvement. They must adopt root cause analysis which goes beyond surface-level to understand why something happened. The lead reviewer may choose to use tools like the 5 Whys, Fishbone Diagrams, process mapping or SWOT analysis to explore systemic factors. These tools can also act as a helpful visual for readers to view issues collectively and see their connections.

### **8.2 SMART objectives**

It is important that when producing their improvement plan, the Learning Review subgroup formulates **SMART improvement actions**. They must ensure suggested improvements are:

- **S**pecific
- **M**easurable
- **A**chievable
- **R**elevant
- **T**ime-bound

They must develop a plan that bolsters all relevant partners towards suitably ambitious goals. They must assign ownership, across agencies to each improvement action. This step is vitally important, to ensure that after the Learning Review has been undertaken and reported to committee and COG the pace and commitment is not lost.

Coproduction and stakeholder engagement is encouraged involving practitioners, service users, and partner agencies in identifying and shaping improvements. Quantitative and qualitative data from the review should guide improvement planning

and create the expectation of collaborating improvement activity with Performance Management and Learning and Development services.

### **8.3 Clear governance and accountability**

Committees must have a clear and understood plan of how they will monitor whether actions are on track and making the desired impact. The Learning Review subgroup will formulate improvement actions by setting out:

- What are we trying to accomplish? – **PLAN**
- What change can we make that will result in an improvement? – **DO**
- How will we evidence that a change is an improvement? - **STUDY**
- How will learning be embedded and sustained across the partnership? - **ACT**

Committee must participate in healthy discussion and debate as to whether the proposed responses genuinely tackle the systemic risks identified by the Learning Review and at the right levels of a system hierarchy. They must avoid assuming that disseminating the Learning Review findings to operational staff is adequate, improvement must be demonstrated through measurable change.

Individual agencies need to have their own mechanisms in place to track improvements across Learning Reviews to enable them to report progress and meet timescales set.

Committee should consider whether a Task and Finish Group will be needed to manage and monitor progress, particularly if there are numerous points to the plan and if several organisations are involved and responsible for different aspects.

Actions should be integrated into Committees core business/improvement plan ensuring visibility, accountability and regular review at each meeting.

## **STEP 9 - Publication and Dissemination of Learning**

### **9.1 Publication**

The Chief Officers Group (COG) will be informed by a recommendation from either Committee, whether and when a Learning Review report should be published. In making this decision, careful consideration must be given to confidentiality and data protection requirements. The family should be consulted, and their views should be considered and afforded appropriate

weight. Information governance advice should be utilised to ensure that all personal and sensitive information has been appropriately anonymised and compliant with data protection legislation and that any risk of indirect or consequential identification have been appropriately mitigated. The advice from Information governance will be necessary to inform any decision on whether to publish the report.

Any published report must be appropriately anonymised while clearly conveying the key learning and evidence underpinning any recommended changes. If the decision is made **not** to publish, the exceptional reasons for this must be formally recorded in the minutes of the COG meeting. In such cases, the learning should still be extracted and shared separately in an anonymised format.

Even where a decision is made not to proactively publish, there remains the possibility, particularly in high-profile cases, that a Freedom of Information (FOI) request may be submitted. In these circumstances, the relevant public authority has a duty to disclose information unless specific exemptions apply, especially where there is a strong public interest in transparency.

While there is an exemption for the release of personal data where disclosure would breach data protection principles, it may not be possible to justify withholding the entire report. In such cases, the report may need to be released with redactions to protect personal information.

It should also be noted that publication may need to be postponed until the conclusion of any criminal proceedings or Fatal Accident Inquiry (FAI). Where criminal, FAI, or children's hearings proceedings are ongoing, publication must be discussed in advance with the Crown Office and Procurator Fiscal Service (COPFS) and/or the Scottish Children's Reporter Administration (SCRA). It may be appropriate to consult with legal services to provide advice on publication.

An Executive Summary should accompany every learning Review report. It must provide a clear, concise overview of the circumstances leading to the review, the key areas of learning identified, and the actions or recommendations for improvement. The summary should be written in accessible language, avoiding jargon, and suitable for sharing with families, practitioners, elected members, and the wider public. Where a full report is not published, the Executive Summary may form the basis of the anonymised learning brief used for wider dissemination. It should be reviewed and agreed by the review team and the relevant Committee prior to submission to the Chief Officers Group (COG).

A media strategy and communications plan should be developed in collaboration with HSCP communications lead and other partner agency communication leads. The plan should outline:

- The timing and format of any public or media statement
- Key messages
- Be coordinated across agencies
- Provide a key contact for responding to media enquiries

All communication should reflect trauma informed principles, ensuring that messages are respectful to the family and those involved in the case.

The family should receive the report or an agreed version of it in advance of publication. The identified lead for family engagement should ensure that the family is supported to understand the report and seek their views on publication, these views should be formally recorded. The family should be supported with ongoing communication and support, emotional and practical before, during and after publication. Should the family not agree with the publication, their reasons and preferences should be noted and carefully considered in the decision-making process by COG.

All professionals directly involved in the case should be informed of the findings and conclusions of the review, the intended publication date and any support available to them. Operational and first line managers and HR leads should ensure that staff are provided with emotional and professional support.

## 9.2 Dissemination of learning

Committees must discuss and plan a robust programme for dissemination of learning locally. Committee should consider all workforce levels, different learning styles and opportunities for repeat exposure to important areas of learning and improvement. A tiered learning response will likely be necessary dependant on roles and responsibilities. Learning must be manageable to avoid overwhelm and duplication whilst seeking reinforcement. A variety of methods and medias can be used can be used:

### Written Summaries and Briefings

- **Use of CPC/APCs 7-minute briefing cycle:** highlighting key findings, lessons learned, and recommended actions.
- **Learning Review Report:** Full report shared with relevant teams, with executive summaries for wider audiences.
- **Briefings and newsletters:** Regular updates that include learning points from recent reviews.
- **Learning Packs:** Combined packs covering the key areas for improvement and learning materials

## Interactive Learning Sessions

- **Workshops or Learning Events:** Facilitated sessions where staff can discuss findings and implications.
- **Lunch & Learn Sessions:** Informal gatherings to share insights and promote discussion.
- **Multi-agency Learning Events:** Encourage cross-sector collaboration and shared understanding.

## Use of Digital Tools

- **Microsoft Forms or Quizzes:** To test understanding of key learning points and/or to be used interactively at team meetings
- **E-learning Modules:** Interactive online courses based on Learning Review findings.
- **Practitioner Pages:** Internet based multiagency pages to host key learning documents and communications
- **SharePoint Sites:** Central hub for storing and accessing learning materials.
- **Webinars:** Committee members coming together to host Learning Review webinars presenting improvement work

## Visually Engaging Aids

- **Infographics:** Visually engaging summaries of key learning.
- **Posters or One-Pagers:** Displayed in staff areas or emailed for quick reference.

## Embedding Learning into Practice

- **Policy and Procedure Updates:** Ensure learning leads to tangible changes.
- **Supervision and Reflective Practice:** Learning Reviews as discussion points in staff supervision, 1-1 and team development sessions.
- **Practice Guidance Documents:** Translate learning into actionable guidance that is accessible and user-friendly.

## Peer Learning

- **Communities of Practice:** Small groups of staff in similar roles that meet regularly to reflect on practice.
- **Mentoring and Coaching:** Use experienced staff to support others in applying learning.

## Leadership Communication

- **Manager Briefings:** Ensure leaders are equipped to cascade learning.
- **Video Messages:** Senior leaders sharing key messages and reinforcing importance.

Committees should also include in their dissemination plans how they will share the learning externally to the national public protection community. This could be utilising a couple of the methods listed above, for example, a 7-minute briefing, learning pack and webinar.

National ASP learning materials should be uploaded where appropriate to the [\*\*ASPire Hub\*\*](#)

National CP Learning materials should be uploaded where appropriate to the [\*\*Knowledge Hub\*\*](#)

Following implementation of their plan they should be clear about when and what methods that will be used to test and evaluate the impact of activities undertaken.

## **STEP 10 – Sustaining the Learning**

Planning how we will measure whether improvements have worked through continued evaluation and impact measurement.

We must be clear about plans for longer-term monitoring of improvement actions and follow up to evaluate impact.

From the outset it should be clear how learning will be translated into measurable change. Each action should have a defined outcome or intended impact, identified measures of success, timescales and responsible leads. On going evaluation should assess whether actions have resulted in improved practice, decisions making and outcomes for children, families or adults at risk.

### **10.1 Monitoring and Evaluation**

Evaluation should be proportionate and use both quantitative and qualitative evidence to assess impact.

- **Key Performance Indicators (KPIs):**

Measuring agreed outcomes such as timescales for assessment, quality of inter-agency communication, or compliance with procedures.

- **Staff Confidence Surveys:**  
Gathering feedback from practitioners on whether learning from the review has influenced confidence, understanding, and decision-making in practice.
- **Case Audits:**  
Reviewing relevant cases post-implementation to assess whether learning has been embedded and whether similar risks are now better managed.
- **Service User Feedback:**  
Seeking feedback from children, families, and adults with lived experience to understand whether changes have improved their experience and outcomes.

CPC or APC should receive regular progress reports on implementation and impact at agreed intervals. Where evidence indicates that improvements have not been achieved, or unintended consequences have arisen, further action or support should be agreed and recorded through the Committee's ongoing improvement plan.

## 10.2 Self-evaluation from National Learning Reviews

Learning from national Learning Reviews is a key part of continuous improvement across Scotland's public protection systems. The CPC and APC will ensure that learning from national reviews is captured, considered and applied within local practice. Each Learning Review subgroup will maintain oversight of national Learning Review findings and thematic reports shared through the [Knowledge Hub](#). National learning will be a standing agenda item within the subgroup meetings to review and discuss national Learning Reviews and emerging themes. Through these mechanisms, Falkirk CPC/APC will ensure that local systems remain responsive to national insights and that learning from across Scotland continues to inform, challenge, and strengthen local practice.

## Appendix 1 – Learning Review Notification Form



### FALKIRK CHILD PROTECTION COMMITTEE / FALKIRK ADULT PROTECTION COMMITTEE

OFFICIAL – SENSITIVE – PERSONAL

#### LEARNING REVIEW NOTIFICATION

Request from:	
Contact details:	
Agency:	
Date completed:	

Any member of the Child Protection Committee/Adult Protection Committee, agency or practitioner can ask for a case to be considered by Falkirk Child Protection Committee or Falkirk Adult Protection Committee for a Learning Review if they consider it meets the following criteria:

Criteria - Child	Criteria – Adult
<p><b>When a child has died or has sustained significant harm or risk of significant harm as defined in the <a href="#">National Guidance for Child Protection in Scotland 2021</a></b></p> <p><b>and</b> there is additional learning to be gained from a review being held that may inform improvements in the protection of children and young people</p> <p><b>and</b> one or more of the following apply:</p> <ul style="list-style-type: none"><li>• abuse or neglect is known or suspected to be a factor in the child's death or the sustaining of or risk of significant harm</li><li>• the child is on, or has been on, the Child Protection Register</li></ul>	<p><b>1.</b> Where the adult is, or was, subject to adult support and protection processes and the incident or accumulation of incidents gives rise to reasonable cause for concern about how professionals and services worked together to protect the adult from harm, and one or more of the following apply:</p> <p><b>(i)</b> The adult at risk of harm dies and</p> <ul style="list-style-type: none"><li>• harm or neglect is known or suspected to be a factor in the adult's death;</li><li>• the death is by suicide or accidental death;</li><li>• the death is by alleged murder, culpable homicide, reckless conduct, or act of violence or</li></ul>

<p>(CPR) or a sibling is or was on the CPR or was a care experienced child or was receiving aftercare or continuing care from the local authority. This is regardless of whether or not abuse or neglect is known or suspected to be a factor in the child's death or sustaining of significant harm, unless it is absolutely clear to the Child Protection Committee that the child having been on the CPR or looked after has no bearing on the case</p> <ul style="list-style-type: none"> <li>the child's death is by suicide, alleged murder, culpable homicide, reckless conduct, or act of violence and one or more from the above apply</li> </ul> <p><b>and</b> there is additional learning to be gained from a review being held that will lead to improvements in the protection of children and young people.</p> <p>Learning Reviews may also be undertaken where effective working has taken place and outstanding positive learning can be gained to improve practice in promoting the protection of children and young people.</p> <p>This criteria does not preclude a CPC reviewing the death of a child pre-birth.</p>	<p><b>(ii)</b> The adult at risk of harm has not died but is believed to have experienced serious abuse or neglect.</p> <p><b>2.</b> Where the adult who died or sustained serious harm was not subject to adult support and protection processes</p> <p><b>(i)</b> When the findings of an inquiry or review by another organisation or court proceedings, or a referral from another organisation gives rise to reasonable cause for concern about lack of involvement in relation to the Adult Support and Protection (Scotland) Act 2007; or</p> <p><b>(ii)</b> The Adult Protection Committee determines there may be learning to be gained through conducting a Learning Review.</p>
<p><b>Child:</b></p> <p>Where the referring agency or individual considers that a case meets the criteria above, they should complete and forward this Learning Review Notification form to the Child Protection Committee at - <a href="mailto:ChildProtectionCommittee@falkirk.gov.uk"><u>ChildProtectionCommittee@falkirk.gov.uk</u></a></p> <p>(The Referrer can discuss the referral with the Chair and/or the Learning Review nominated person within the CPC)</p>	<p><b>Adult:</b></p> <p>Where the referring agency or individual considers that a case meets the criteria above, they should complete and forward this Learning Review Notification form to the Adult Protection Committee at – <a href="mailto:adultprotectioncommittee@falkirk.gov.uk"><u>adultprotectioncommittee@falkirk.gov.uk</u></a></p> <p>(the referrer can discuss the referral with the Chair and/or the Learning Review nominated person within the APC)</p>

## Information for Consideration of Learning Review - Child

<b>Child's details</b>	
Name:	
DOB:	
Address:	
<b>Parents' /carers' details</b>	
Names and DOB of child's parents/carers:	
Address if different to child's:	
<b>Child Protection Register</b>	
Is the child's name currently on the Child Protection Register?	
Are any siblings currently on the Child Protection Register?	
Has the child's name previously been on the Child Protection Register? If yes, provide details, including dates.	
Have any siblings previously been on the Child Protection Register? If yes, provide details, including dates.	
<b>Looked After Child</b>	
Has the child been looked after by, or received aftercare/continuing care from local authority? If yes, please give details, including dates.	
Have any siblings been looked after by, or received aftercare or continuing care from the local authority? If yes, please give details, including dates.	

<b>Criteria for Learning Review</b>	
What grounds within the criteria do you consider apply for a Learning Review in this case?	
<b>Immediate and general concerns</b>	
Are there any immediate concerns? If yes: What are the immediate concerns and have these been passed to the relevant agency for consideration/ action?  What action has been taken?	
Are there any general concerns identified during this process of notification? If yes:  What are the concerns and have these been passed to the relevant agency for consideration /action?  What action has been taken?	
<b>Summary of the case:</b>	
<b>Date of Significant incident</b>	
<b>Are other reviews, criminal investigations or other statutory proceedings underway? If so, please give details.</b>	

**Name of service/agency/individuals involved with the child(ren) and/or family,  
including named person and Lead Professional**

Service:	Role with the child/the family:	Practitioner name and title:	Contact details:

## Information for Consideration of Learning Review – Adult

<b>Adult's details</b>	
Name:	
Date of birth:	
Date of death:	
Home address &/or current residence:	
Gender:	
current legal status:	
Next of Kin/carers address if different:	
Please include key additional factors such as disability, ethnicity, religion:	
Any other Local Authorities involved:	
Is/was the adult subject of any statutory powers at time of concerns arising in relation to Adult Support and Protection, Adults with Incapacity or the Mental Health (Care & Treatment) Act?	
Contact details for any Guardian or Power of Attorney, if known	
<b>Criteria for Learning Review</b>	
What grounds within the criteria do you consider apply for a Learning Review in this case?	

<b>Immediate and general concerns</b>	
<p>Are there any immediate concerns? If yes:</p> <p>What are the immediate concerns and have these been passed to the relevant agency for consideration/ action?</p> <p>What action has been taken?</p>	
<p>Are there any general concerns identified during this process of notification? If yes:</p> <p>What are the concerns and have these been passed to the relevant agency for consideration /action?</p> <p>What action has been taken?</p>	

<b>Summary of the case:</b>
<p><b>Are other reviews, criminal investigations or other statutory proceedings underway? If so, please give details.</b></p>

Parallel processes	
Are you aware of any parallel processes for any other type of review being undertaken for this case? If yes, please give details.	
Are you aware of any criminal procedures being undertaken in connection with this case? If yes, please give details.	

Date of significant incident:	
Summary of the case:	

Name of service/agency/individuals involved with the adult and/or family,			
Service:	Role	Practitioner name and title:	Contact details:

The recommendation is that this notification will be responded to within 28 to 42 days, with the outcome of the CPC's / APC's consideration of whether or not to proceed with a Learning Review.

## Appendix 2 – Partner Agency Request for Information Form



### Request for Information

**FALKIRK CHILD PROTECTION COMMITTEE /  
FALKIRK ADULT PROTECTION COMMITTEE**

**OFFICIAL – SENSITIVE – PERSONAL**

#### **REQUEST FOR INFORMATION TO CONDUCT A LEARNING REVIEW**

You have been identified to participate in a Learning Review and are asked to complete this request for information.

This report is required to be completed within **10 working days** and sent electronically to (insert)

This report is required to contain information outlining your agency/service contact/ interaction with the adult/child and/or family whose details are below.

Please include a brief account of agency involvement prior to the event which triggered the notification and some very initial reflection regarding practice and decision-making within that agency. If you have historical information, please give a brief summary of the themes and issues you have identified in the background history section.

Learning Review identifier:	
Date of the request for information:	

Child/Adult's Name and Identifier number:	
Date of birth:	
Date of death (if applicable):	
Date of significant incident:	
Gender:	

\*If more than one adult/child for whom the Learning Review is considered, repeat the second column. Please provide the following information (complete/delete as appropriate).

<b>Details – Child</b>	
Names of child's parents/carers and dates of birth:	
Names of siblings and dates of birth:	
Child's home address:	
Child's current address, if different from above:	
Education establishment details:	

<b>Details – Adult</b>	
Adult's home address:	
Adult's current address, if different from above:	

If more than one child for whom the Learning Review is considered, please amend or repeat the table above

<b>Summary of involvement with the Adult/child(ren) and/or family:</b>
<b>Background history:</b>

**Relevant Chronology: please insert any additional rows**

Date of Event	Brief Detail of Event	Agencies/People Involved	Outcome/Consequences for child/adult

**Key practice issues:**

Please provide information on:

- recognition and assessment of risk and need in relation to the Adult(s) /child(ren)/family
- information sharing in this case
- strategies and actions to minimise harm
- timely and effective action taken
- multi-agency responses
- evidence of planning and reviewing
- quality of record keeping
- appropriate use of legal measures
- evidence of child/person-centred practice
- any good practice identified
- any areas identified for practice improvement

<b>Parallel processes</b>	
Are you aware of any current or planned reviews being undertaken for this case? If yes, please give details.	
Are you aware of any criminal proceedings associated with this case? If yes, please give details.	

<b>Report completed by:</b>	
<b>Name:</b>	
<b>Title:</b>	
<b>Agency:</b>	
<b>Email address:</b>	
<b>Date:</b>	

## Appendix 3 – Learning Review Decision and Recommendation Form



### **FALKIRK CHILD PROTECTION COMMITTEE / ADULT PROTECTION COMMITTEE**

**OFFICIAL – SENSITIVE – PERSONAL**

#### **LEARNING REVIEW RECOMMENDATION AND DECISION**

**(within 20 working days of notification)**

<b>Adult(s) /Child(ren)'s name(s) and date(s) of birth:</b>	
<b>Learning Review identifier:</b>	

<b>Notification from:</b>	
Name:	
Agency:	
Date of notification:	

<b>Basis for referral:</b>	
<b>Agencies that provided information during the information gathering stage:</b>	

**A brief outline of the case:****Current circumstances of the child/adult and family (including actions taken):****Details about other formal and/or parallel processes:****Summary of key practice issues from single agency information****Recommendation**

After consideration of the notification and the information submitted from relevant agencies, the nominated person/sub-group within the APC /CPC:

**recommends a Learning Review to be undertaken.**

**does not recommend a Learning Review to be undertaken.**

**A brief rationale for the recommendation** (overall views on the information gathered and the criteria):**Detail Learning Review tier and associated timescale****Recommendation completed by:****Name:****Title:****Email address:****Date:**

**For completion after the Adult /Child Protection Committee decision**

**Section 1: The Decision**

	After consideration of the information submitted from relevant agencies, APC /CPC have considered the request for undertaking a Learning Review and have <b>decided that this does reach the criteria for a Learning Review</b> . See Section 2A below.
	After consideration of the information submitted from relevant agencies, APC /CPC have considered the request for undertaking a Learning Review and have <b>decided that this does not reach the criteria for a Learning Review</b> . See Section 2B below.
<b>A brief rationale for the decision</b> (short comment on the recommendation made by the nominated person/sub-group within the APC /CPC, the information considered and criteria):	

<b>Section 2: Next steps</b>	
2A: To be completed if the decision is to proceed with a Learning Review	<p>Initial considerations regarding:</p> <ul style="list-style-type: none"> <li>● Learning Review Team set up</li> <li>● terms of reference and the time-period under review</li> <li>● family liaison approach</li> </ul>
2B: To be completed if the decision is not to undertake a Learning Review	<p>Reason for not proceeding with a Learning Review:</p> <p>Initial considerations regarding an alternative approach for learning (e.g. facilitated multi-agency or single agency reflective sessions, file audits etc.):</p>

<b>Section 3: Further considerations</b>	
Communication and media approach (where relevant):	
Other (/parallel) reviews or processes (where relevant):	

<b>Completed by:</b>	
<b>Name:</b>	
<b>Title:</b>	
<b>Email address:</b>	
<b>Date:</b>	

## **Appendix 4 -Learning Review Notification To Crown Office & Procurator Fiscal Service - CPC**

Where a criminal case or death report has been submitted to COPFS and a Learning Review is to be conducted, the Chair of the Child Protection Committee or designated member should, in conjunction with the local policing Detective Superintendent or the Senior Investigating Officer, complete this Notification Form and submit it to the Single Point of Contact (SPOC) within the Crown Office and Procurator Fiscal Service (COPFS) copying in the local policing Detective Superintendent.

In circumstances where a case has not been reported to COPFS, the Chair of the Child Protection Committee or designated member should complete this Notification Form and send it to the local policing Detective Superintendent who will arrange for a report to be prepared for COPFS. Once prepared, this Notification Form along with the report should be submitted to the SPOC within COPFS.

\*This report should only be submitted once authority has been given by the Chair of the CPC after a LR has been agreed but before it has commenced.

\*\*All email communications must be made from a secure email address i.e. .Gov.Uk/NHS.net or PNN.Police.uk and sent to the agreed copfs.gov.uk address.

### **Stage 1: Learning Review Notification**

<b>1. DETAILS OF CASE UNDER REVIEW</b>	
Child's Name:	
Child's Address:	
Names of those with parental responsibility and their relationship to the child.	
Date of Incident:	
Name and contact details of Reviewer:	
Police Scotland Crime Reference Number:	
Name and contact details of Senior Officer in charge of investigation:	
Crown Office Procurator Fiscal Reference Number	(Where a case has been submitted to COPFS, this form should not be submitted without the PF reference number.)
Confirmation that the case has been reported to COPFS	Y/N – If no, confirm that the Notification Form has been sent to the local policing Detective Superintendent and the report on the investigation prepared by Police Scotland is available.

## **2. SUMMARY OF CASE UNDER REVIEW**

(Provide information regarding the circumstances of the incident and information as to why a Learning Review is being conducted.)

## **3. FORMAT OF THE REVIEW PROCESS**

(As a minimum, this should include; the intended structure of the review i.e. paper/file read only, group discussions, one to one conversations or a mixture of both; the focus of the review; the witnesses who will be contacted and the purpose of the contact with those witnesses.)

## **4. DETAILS OF PERSONS WHO WILL BE SPOKEN TO DURING THE REVIEW PROCESS**

<b>NAME</b>	<b>EMPLOYED BY OR ADDRESS IF NOT EMPLOYEE</b>

## **5. INTENDED TIMESCALES**

(Please specify the intended start date together with an estimated completion date. If there are any timescales for contacting proposed witnesses, please include this information.)

## **6. ANY OTHER RELEVANT INFORMATION/CONCERNS**

**7. DETAILS OF CPC CHAIR OR OTHER AUTHORISED CONTACT**

Name:	
Telephone number:	
Email address:	
(All email communications must be made from a secure email address i.e. .Gov.Uk/NHS.net or PNN.Police.uk and sent to the agreed copfs.gov.uk address.)	
Date signed:	Signature:

**(to be submitted to the Chair of the CPC)**

**Stage 2: COPFS response**

(The response should be intimated to the person submitting the request within 28 days).

**8. DETAILS OF ANY FURTHER INFORMATION REQUESTED FROM CPC****9. COMMENTS ON PERSONS WHO WILL BE SPOKEN TO DURING THE REVIEW PROCESS**

NAME	

**10. DECISION FOLLOWING NOTIFICATION OF LEARNING REVIEW**

I. No objections to LR proceeding.	Provide summary of reasons for decision.
II. LR can proceed but additional conditions are set.	Provide summary of reasons for the decision and clearly set out any additional considerations/constraints.

III. LR cannot proceed	Provide information about the decision. If the case is particularly sensitive and there are reasons why we are unable to explain our decision, advise the CPC accordingly.
Date signed:	Signature:

## Appendix 5 - Learning Review TOR Template



### **FALKIRK CHILD/ADULT PROTECTION COMMITTEE \*DELETE AS APPROPRIATE\* LEARNING REVIEW TERMS OF REFERENCE INSERT REVIEW TITLE**

It should be noted that this term of reference is a living document and, once the review is underway, it may need to be amended as further information is collated by the Review Team. Committee should be informed of and in agreement with any changes to the terms of reference.

Committee hold overall responsibility for this Learning Review and its outputs.

#### **The Rationale for the XXXXX Learning Review**

Outline Rationale linked to criteria and committee discussion

#### **A systemic approach**

The Learning Review for xxxxx is a collective endeavour that will adopt a systemic approach. This approach goes beyond individual or professional practice to explore underlying systemic factors, the links with organisational factors and the wider contexts. The central idea is that any professional's performance is a result both of their own skills and knowledge, and of the organisational setting in which they are working.

This Learning Review, therefore, must focus on understanding how people saw things at the time, why things happened as they did, what belief systems were operating and how capabilities and capacity were affected by the roles and positions adopted by family members and other professionals, together with the emotional impact of the work and the resources available.

To provide effective support and protection we need to understand how our systems are working. By reviewing cases we can increase our understanding of the realities of frontline practice, the challenges and the strengths and weaknesses that currently exist. In turn, focussing on systems and which aspects of our work context maintain our weaknesses and which support workers to accomplish their tasks successfully.

## Trauma Informed

The Review Team will ensure that wherever possible they are drawn back to and embed the trauma informed principles into the way that the Learning Review is conducted. This includes everyone involved.

Trauma-informed practice is based around five core principles:

- **safety:** helping people feel physically and emotionally safe
- **choice:** giving people meaningful choices, and a voice in decisions that affect them
- **collaboration:** asking people what they need, and involving them in considering how their needs can be met
- **trust:** being clear so that people know what to expect, and doing what you say you will
- **empowerment:** validating people's feelings, and supporting them to take decisions

## The Review Team

The Review Team will manage the whole process of the Learning Review and is a multi-agency group whose members have a working knowledge of the relevant services involved in supporting and protecting adults at risk of harm.

The Review Team has been selected to ensure its members did and do not have direct involvement in (XXX) care and support and protection. It is the Review Team's responsibility to ensure the Learning Review remains proportionate and focused and is conducted in accordance with the following underlying principles and values:

- promote a culture that supports learning
- emphasis is on learning and organisational accountability and not on culpability
- recognise that a positive shared learning culture is an essential requirement for achieving effective multi-agency practice
- objective and transparent
- sensitive to the needs and circumstances of adults at risk and their families
- ensure that staff are engaged and involved in the process and supported throughout the period of the review
- recognise the complexities and difficulties in the work to support and protect adults at risk and to support families
- produce learning which can be disseminated, both at local and national level, so it directly impacts on and positively influences professional practice and organisational systems

The Review Team works together within a culture of collaborative problem solving to review and assess all information available; clarify issues for further exploration and to identify any gaps or deficiencies in the information available to the Review. The Review Team brings to the task the ability to reflect; to analyse and to look at the wider impact for practice and service delivery.

The Review Team consists of the separate roles of:

- The Chair – XXXXX
- Team members – XXXXX
- The Reviewer – XXXX
- The Administrator – Falkirk Council Customer and Business Support Officer

## **The role of the Reviewer**

The overarching role of the Reviewer is to facilitate and manage the learning emerging throughout the review process and to take responsibility to produce the report at the end of this process which brings together all the learning into a coherent whole.

Any significant risks/needs identified by the Reviewer during the Learning Review process will be reported immediately to the Chair of the Review, CPC/APC Chair and/or Chief Officer from the agency concerned.

## **Learning Review Process and Timescales**

The Learning Review will follow a clear process with the timescales listed below:

- 1st Review Team Meeting – XXXX
- 2<sup>nd</sup> Review Team Meeting – XXXX
- Engaging with Family Members – XXX
- 3<sup>rd</sup> Review Team Meeting – XXXX
- Practitioner Event – XXXX
- Senior Managers Event – XXXX
- Draft Report – XXXX
- 4<sup>th</sup> Review Team Meeting – XXXX  
Presentation/Dissemination to
- Adult Protection Committee on XXXX
- Chief Officers Group on XXXX

## **Family involvement**

As per Family Liaison Strategy. See separate document

## **Time Period to be covered**

The period to be covered by the Review will be from \*insert timeframe\*

Time will be set aside to reflect on the impact of the early years/early family history and relationships and the overall impact on the children/adult subject to the Review.

## **Specific issues to be considered by the review**

The Learning Review aims to examine the multi-agency response to a child/adult subject to harm, abuse and neglect. To include a focus on the effectiveness of partnership working, risk assessment, and understanding of the type of harm presented.

Specific Issues to be considered are:

## Parallel or other processes

### Staff communication and wellbeing

The Review Team should be continuously considering the wellbeing of adult support and protection partners throughout the Learning Review. All practitioners should receive clear communications and be reminded of the supports and tools available locally and on the National Wellbeing Hub. [Home - National Wellbeing Hub](#) Any practitioner who needs 1-1 discussion with a member of the Review Team will know of its availability and how to request this.

#### Signed and dated by:

**Reviewer(s):**

**Review Team Chair:**

**Date:**

## Appendix 6 - Learning Review Timetable Templates – Tier 1, 2 and 3

### Example of a Learning Review Process – Tier 1 (Multi-Agency Learning Workshop)

*, covers stages from initial notification to dissemination[completed within 0 months]*

#### Week 1–4: Notification and Scoping



- Screening meeting takes place and recommends for Tier 1 Learning Review.
  - Confirm decision and type of review (short-form workshop).
  - Lead Officer drafts brief Terms of Reference outlining:
    - Purpose and scope
    - Agencies involved
  - Expected timescales (≤ 3 months)
  - Identify internal facilitator
- Schedule workshop date(s) and identify key participants (multi-agency professionals directly involved).
- Collect key documents: agency summaries, timeline, and any relevant chronologies or assessments.

#### Week 4–6: Preparation and Information Gathering



- Facilitator reviews collated information and identified emerging themes, gaps or learning questions.
- Confirm participants' availability and provide pre-workshop brief outlining purpose, approach, and expectations.
  - Confirm family contact strategy
- Prepare workshop structure and learning prompts based on themes and local/national frameworks.

#### Week 6–7: Learning Workshop

##### Format (½–1 day session)



- Introduction: principles, purpose, and learning focus (not blame).
  - Joint reconstruction of the case story.
    - Identification of:
      - Key decision points and rationale
      - Barriers and enablers to effective practice
        - Good practice examples
    - Immediate learning and improvement opportunities
  - Group discussion of what changes would strengthen practice or systems.
    - Facilitator captures key learning themes and proposed actions.

## Week 7-10: Drafting Learning Summary



Facilitator prepares a short Learning Summary Report including:

- Case overview (anonymised)
  - Learning themes
  - Effective practice
  - Recommendations or improvement actions
  - Links to policies, procedures, or training implications
- Circulate draft to participants for accuracy and agreement.

## Week 10-12: Sign-off and Dissemination



- Final Learning Summary presented to the APC/CPC and Learning Review Subgroup .

Subgroup agrees next steps:

- Communication plan
- Integration of learning into training or briefings
- Monitoring of actions via the Learning Review Subgroup

## Feedback and Implementation



- Feedback to involved staff and managers (short debrief )
- Consider proportionate family feedback if appropriate.

Incorporate learning into:

- Practice bulletins
- Learning briefings

## **Example of a Learning Review Process – Tier 2/3**

**(covers the stages between appointing the Review Team and the beginning of dissemination)**

---

### **Appointing the Review Team**

*Appoint Review Team Chair, members and administrator*

*Lead Officer drafts review terms of reference*

*Lead Officer prepares lead reviewer contract*

*Advertise, interview and appoint external reviewer*

*Schedule Review Team meetings*

*Lead Officer shares securely with all members of the Review Team the Learning Review notification, minutes of Learning Review working group, single agency reports, chronological information and relevant reports and minutes of committee*



### **First Review Team Meeting**

*Practicalities including discussing the principles and ways of working, clarifying roles and functions; identifying Practitioner Event participants and Senior Manager event participants and their preparation;*

*Sense making of the situation;*

*First pass at issues and questions to explore;*

*Arrangements for collating further information (if gaps identified);*

*Set dates and venues for Review Team Meetings, and Practitioner & Senior Manager events.*



### **Second Review Team Meeting**

*Confirming tasks done*

*Checking on the implementation of the Family Liaison Strategy;*

*Checking on the preparation for the Practitioner & Senior Manager events (confirmations; information and support for practitioners attending)*

*Further exploration of the emerging issues and reflections.*



### **Engaging with Family Members**

*(according to the Family Liaison Strategy)*



## **Practitioner Event**

*Jointly discussing the story of involvement, identifying and analysing significant events;  
Identifying learning;  
Identifying effective practice;*

*Thinking about possible strategies for improving practice and systems, including possible recommendations.*



## **Post Practitioner Event**

*Writing up learning points and circulate to participants to check for accuracy/agreement*



## **Senior Managers Event**

*Discussing the outline of the situation, the challenges and what worked well and why, the changes needed and the strategies for improvement, together with the emerging recommendations.*



## **Draft Report**



## **Third Review Team Meeting**

*Discussion of draft report*



## **Fourth Review Team Meeting**

**(NB:** a 4<sup>th</sup> meeting might not be necessary. If things are straightforward there is a possibility all of this can be done at the third panel meeting)

*Finalising report*

*Outline action plan*



## **Feedback to Family**



## **Presentation/Dissemination to APC/CPC and COG**

## Appendix 7 – Draft Family Liaison Strategy



### FALKIRK CHILD/ADULT PROTECTION COMMITTEE

### FAMILY LIAISON STRATEGY

XXXX

#### Introduction

An important function of the Review Team is the formation of a Family Liaison Strategy that ensures that families are included in any review process that is being undertaken in a planned, supportive and structured way.

#### Review Team members who are responsible for informing the family of the review

List Review Team members leading on liaison with family

To include time spent explaining the purpose and process of review and the request to have their views included in this.

Personalise the 'information for families and carers' leaflet to include contact details and share with family members.

#### Identifying who the family is and who should be invited to contribute their views

To include:

#### Arrangements for gathering family views

Should include:

- Invitation to meet with responsible team members to discuss the review and their involvement
- Offer to support a referral to independent Advocacy Services
- Time to meet Review Team member and external reviewer

- Discussion and agreement about how views will be documented
- Feedback to family following review

## Sharing information and documentation with family

To include:

- Face to face feedback following review key processes
- Copy of final report

**Signed and dated by:**

**Reviewer(s):**

**Review Team Chair:**

**Date:**

## Appendix 8 – Information for Families and Carers



### Information for Families and Carers

Protecting adults, children and young people is the responsibility of several different organisations such as Social Work, Health, Education, Police and others who support families.

In each local authority area, there is an Adult Support and Protection Committee and a Child Protection Committee, which are made up of a group of people who work for these organisations. The committees make sure organisations and the local community work together to plan, carry out and improve the way the adult protection and child protection processes work.

### What is a Learning Review?

#### When is it needed?

When an adult or child dies or is seriously harmed, or when an adult or child was at risk of death or serious harm, the local Protection Committee must decide whether or not to look further into what happened.

#### Why does the Protection Committee do this?

To understand if there are any lessons to learn about the support offered to you and your family. The Committee looks at how people have worked together to support you and your family: for example, social workers, GPs, teachers, health visitors, police etc. This is called a 'Learning Review.'

#### What happens during a Learning Review?

A person called a Reviewer will speak to family members, professionals and other people who know/knew your relative or child/ren to learn more about what happened and to suggest how to make things better in the future.

The Reviewer will be helped by a small group of people from other organisations. This group is called the 'Review Team'. Both the Reviewer and the Review Team will get information from all the organisations that have worked with you and your family. This will mean sharing information and records that they have about your family. This information will only be shared with the Review Team and will remain confidential.

## Support for You

1. A member of the Review Team will contact you and be your link person. He or she will offer support and communicate with you during the review. This person can let you know what to expect, how the process is going and answer any questions you may have.
2. You can also have other people to support you during this Learning Review process such as a friend, family member, support worker or advocacy service.
3. Some families who have gone through the same Learning Review process have told us the kind of information that helped them. Here are some of their questions and typical answers. Please remember that each situation is different but some of these **questions and answers** might help you.

### Can someone discuss this leaflet with me as I find it easier to talk with someone?

Yes, of course that is a great idea. We want to help you.

A member of the Review Team will be in contact with you so that this can take place.

### Can someone write down key information that I need for the next stage, so I do not forget it or get confused?

Your link person will think that's a great idea to have notes if that will help you – perhaps they might even suggest a small notebook is handy where all your information can be kept together. The note taker could be a friend, family member supporting you, an advocate or another member of the Review Team. This will be your choice.

### What does the Review do that is different to the other services already involved?

The Review is different. It is looking at the actions and responses from all the services involved and so that these services can learn how to improve their practice

### How can the Learning Review help me and my family?

It will give you an opportunity to tell what happened from your point of view and how that felt.

### How do I know what is happening or what is going to happen next?

The member of the Review Team that is helping you will keep you updated so you know what is happening.

### Who are the people involved?

The member of the Review Team who is helping you will help you find out about the different jobs and tasks that people have in the Review.

### What information from me will the Reviewer and Review Team use?

This is a good question. It may be that they do not use all the information that you share with them. The Reviewer will plan with you how they will use your information. You can ask about who will be able to see this.

## **How will I hear about what the Review decides?**

Speak to the member of the Review Team who is supporting you to find out how you will hear about the learning and outcomes of the Review. They can provide more information.

## **What if there is media interest? How do I handle media interest?**

Sometimes, there may be newspaper or media interest in the outcome of a Review. The person supporting you can help you with any arrangements for dealing with this situation if this happens. The important thing is to take it a day at a time.

## **How long will the Learning Review take?**

It usually takes six to nine months from the start of Learning Review to the final report. Sometimes it can take much longer and the person supporting you will speak to you about this if this happens.

We understand this is a very difficult time for you and your family.

We hope that this leaflet has helped you and your family to understand more about the Learning Review. Of course, each family is different, and you may have other questions you would like to ask us or you may want to talk further about the Review. If there is anything else, you would like to discuss this please contact us as follows:

INSERT CONTACT DETAILS

## Appendix 9 – Information for Review Participants



### Learning Review Information for Review Participants

#### Purpose

This document provides a brief overview of the Learning Review Guidance and gives some information about the process which will help you understand your role as a participant in the Practitioner Event.

#### What is a Learning Review?

Learning Reviews (formerly Significant Case Reviews) are used to learn from what has happened when a child or adult has died or been significantly harmed in order to improve systems and practice and provide better protection in the future. A review may also be commissioned in respect of a case where effective practice and positive outcomes have been identified.

Learning Reviews are a function of the Adult Support & Protection Committee and the Child Protection Committee, which are inter-agency strategic partnerships who work alongside the Chief Officers Group and the Scottish Government to drive and improve adult support and protection and child protection policy and practice.

#### What is the Learning Review Process?

##### ➤ **Notification and recommendation**

Senior managers across all organisations are asked to consider significant events against the criteria and make a referral to the committees' Lead Officer where appropriate. If a referral is made this is discussed with the working group. As part of the process each agency involved are asked to submit a report detailing their involvement with the child or adult and their family to help identify the key practice episodes where significant events, decision-making and actions occurred as well as any recurring patterns or themes. This group will make a recommendation to the APC/CPC or APC as to whether a Learning Review is to take place. This recommendation is considered by either committee, and the Chief Officer Group is informed of the APC/CPC's decision.

##### ➤ **The Review Team**

When a decision has been made to proceed to a Learning Review the first step is to set up a Review Team. The Review Team manages the whole process of the Review and is a multi-agency group whose members should have a working knowledge of the relevant services

involved in supporting individuals but, as far as possible, does not have direct involvement in the situation under review.

The Review Team manages the Learning Review process, working together to clarify issues for further exploration and to identify gaps or deficiencies in the information available. An independent Reviewer will manage the learning that emerges throughout the process and is responsible for producing a report at the end of the process which will bring together all the learning.

Our Review Team members are:

(add details)

### ➤ **The Practitioner Event**

\*

A key feature of a Learning Review is the Practitioner Event. The event brings together multi-agency practitioners and ensures that their voice directly contributes to the Review. This allows joint discussion of the story of involvement, identification and analysis of significant events; Identification of learning; Identification of effective practice; exploration of possible strategies for improving practice and systems and recommendations.

It has two distinct purposes:

1. It enables the practitioner to describe what they did and why; to reflect on and analyse assessments and decision-making at the time and to identify what could have been done differently. It also explores any barriers to different actions being carried out at the time. It also enables the group to recognise effective practice and what worked well and why;
2. It generates immediate learning, at both an individual and group level, that can be taken back into practice.

### ➤ **The Strategic Managers Event**

There is also a Strategic Manager event where representatives from each service meet as a group to understand the learning from a particular situation in order to consider the implications from both a single agency and a multi-agency perspective. This takes place following the Practitioner event.

### ➤ **Why have you been asked to attend?**

You have been asked because you were involved in supporting the individuals who are subject of this Review. Your insight and contribution to the staff event and learning that emerges will be valuable.

### ➤ **Who else will be at the Practitioner Event?**

Practitioners from all agencies involved in supporting the family will be there. The total number in attendance is likely to be 15-20.

The events will be facilitated by the Reviewer, (Add details) who will be supported by (add details)

## ➤ What will happen at the Practitioner Event?

Group discussion will be facilitated by the Reviewer, Lead Officer and Learning Review Chair. The discussion will explore your/service involvement in the situation, however, it is important to note that no individual's practice will be singled out. The following questions will be explored:

- What were the main challenges for you in this situation?
- What went well?
- What could have been done differently?
- Were there any missed opportunities?

The event will take place in a comfortable venue with regular breaks throughout the day. Refreshments will be provided.

## ➤ How should I prepare for the staff event?

If you are contributing to a review, do refresh your memory of the case. That may seem redundant most of us will be acutely aware of any case where there has been a death or serious harm – but you could be asked to be part of a review where you had limited but significant involvement.

Think about the assessments and decisions you made; the interactions you had with the individual and their family; and with other professionals.

As well as reflecting on your individual practice, also consider the systems and processes around you which may have impacted on what you did. We don't operate in isolation, what we do is influenced by the environment in which we work, including workplace culture. These factors may facilitate or inhibit good practice and decision-making. Reflect on the questions above. **There is no need to bring files or records with you.**

Please also refer to the National Guidance for Undertaking Learning Reviews which gives a helpful guidance and overview of the process.

[National Guidance For Child Protection Committees Undertaking Learning Reviews \(www.gov.scot\)](https://www.gov.scot/national-guidance-for-child-protection-committees-undertaking-learning-reviews)

[National Adult Support and Protection Learning Review Guidance](https://www.gov.scot/national-adult-support-and-protection-learning-review-guidance)

## ➤ Who will support me?

The information above sets out who from your organisation/agency will support you before and after the event. They will be in contact with you, and you can contact them at any time with questions. Your line manager will also be able to provide guidance and support. You will be told about the process and scope of the review – what will happen and when, as well being given the chance to explore any anxieties you may have and information on the supports available.

There is recognition of the impact that involvement in a review can have on us, and the very real anxiety and distress it can cause. No matter how confident you are in your own practice, being involved in a review can be difficult. You are being asked to think and talk about a child who has died or suffered harm. This can trigger natural emotional responses and may remind us of experiences in our personal lives so we need to be properly prepared and supported throughout the experience. Your Review Team member is there to support you and keep you updated on the progress of the review.

## ➤ What happens with the information gathered at the staff events?

It is the responsibility of the Reviewer to produce a draft report that identifies key learning points and how and why that learning has emerged throughout the review process. The Review Team will scrutinise and ensure the report represents all the learning generated. The final report may be published. The report will be as anonymous as far as possible, and your name will not be included. The learning produced will be disseminated across multi-agency settings and the suggested strategies for improving practice and systems will be taken forward.

## ➤ Practitioner Self-Care and Wellbeing

We recognise that taking part in a Learning Review can cause stress and distress for those involved. The fact that a review is taking place means someone has been significantly harmed or has died in the context of receiving adult support and protection or child protection services. The person concerned is someone with whom you may have worked closely and had a close professional relationship. You may find yourself questioning your own practice or the practice of others, or you may be questioning wider issues which may have contributed to the events giving rise to the review. The Adult Protection Committee and Child Protection Committee recognise that involvement in a Learning Review may cause significant stress for individuals above the stresses usually encountered in their daily role. This means the usual processes you have for managing stress may appear to not work as well as they usually would.

This information is intended to offer information and help you identify sources of support throughout the process of the review to help you contribute to the best of your ability.

### ➤ Self-Care

Self-care is the practice of looking after your own health and wellbeing. As noted above, many professionals have well established self-care strategies which help them cope with the normal stresses of working life however, at times of extreme stress, self-care can feel difficult and normal practices may lapse. The following may help you re-establish or reinforce good self-care habits.

- As far as possible maintain good sleep hygiene and good eating habits
- Set and maintain boundaries between work and home. This may mean turning off your laptop/phone, putting away work papers and stopping work at the end of your working day
- Identify activities that help you relax, that are calming and help you take your mind off the stress you are feeling. While different people will find different types of activities helpful, examples include active mindfulness, gentle stretching exercises, reading, cooking and walking
- Identify activities to help you release the physical tension that comes with stress, again different things will help different people but examples might include running, dancing and gardening
- Think about sensory activities that involve as many senses as possible to help ground you when feeling stressed or anxious
- Use breathing exercises to help lower your heart rate and breathing rate. Box breathing is a useful technique which can help lower levels of cortisol and adrenaline, chemicals in the body associated with stress response <https://www.healthline.com/health/box-breathing>

- Identify trusted people who can support you and help you relax and recharge out of work
- 
- **Professional Supports**

The information provided with your invitation to contribute to a Learning Review will give information about what to expect in the process and any briefing and debriefing processes. You can contact your agency's Review Team member or the lead reviewer for advice or support relating to queries or anxieties you may have about the review process.

### ➤ **Supervision**

Supervision is a process intended to support personal and professional development. Effective reflective supervision is important to promote good standards of practice and support safe decision making however it should also address the emotional impact of your work on you and help you identify supports and coping strategies. Your supervisor should be available to support your involvement in a review.

### ➤ **Professional Network**

You may be able to draw on relationships within your professional network. Whilst the content of the Learning Review is confidential, you may identify supporters at work that you feel able to discuss the emotional impact of your involvement, your experience of the meeting and any worries you may have.

### ➤ **Employee Assistance Programme**

Your agency or employer may provide access to counselling support through an Employee Assistance Programme. This may provide you with telephone support or a fixed number of face-to-face sessions with a qualified counsellor who can provide confidential space to talk about your experiences and feelings. Details of Employee Assistance Programmes can usually be found by speaking to your line manager, HR Department or Union.

### ➤ **Conclusion**

Learning Reviews are a key part of our move towards continuous improvements in practice; however the Committees recognise this process can be anxiety-provoking and stressful for those involved. We hope this paper has identified some ways of supporting yourself and sources of external support.



## FALKIRK CHILD PROTECTION COMMITTEE / FALKIRK ADULT PROTECTION COMMITTEE

OFFICIAL-SENSITIVE-PERSONAL

### LEARNING REVIEW REPORT

<b>Core Data – Adult</b>	
Adult's identifier	
Age of adult	
Gender	
Sexual orientation	
Disability	
Health needs	
Education	
Living circumstances prior to incident	
Position in family/number of siblings	
Ethnicity	
Nature of injury/cause of death	
Legal status	
Agencies/Service involved	

<b>Core Data – Child</b>	
Child's identifier	
Age of child	
Gender	
Disability	
Health needs	
Education	
Living circumstances prior to incident	

Position in family/number of siblings	
Ethnicity	
Nature of injury/cause of death	
Legal status	
Agencies/Services involved	

<b>Family/carer factors (if applicable)</b>	
Age	
Mental health issues	
Disability	
Health needs (include mental health and/or learning disability)	
Substance use (if applicable)	
Convictions (if applicable)	
Problems in childhood (if applicable)	
Domestic abuse (if applicable)	
Additional anti-social behavior (if applicable)	
Ethnicity	
Religion	
Martial/relationship status e.g. co-habiting	
Living circumstances	
Agencies/Services involved	

<b>Environmental Factors</b>	
Financial problems:	
Housing:	
Support from extended family/community:	

<b>Introduction</b>
To include a brief synopsis of the circumstances that led to the review
<b>The review process</b>
<b>The facts</b>
<b>Analysis of the facts</b>
<b>Practice and organisational learning</b>
<b>Effective practice</b>
<b>Suggested strategies for improving practice and systems</b>

<b>Appendices to be included if not already within the body of the report</b>
Review Team membership
Terms of reference for review
Files accessed/relevant documents
People interviewed (identified anonymously through their professional role or relationship to adult/child)

## Appendix 11- External Reviewer My Job Scotland Specification Template

### Personal Specification for Lead Reviewer

#### The Role

Job Title:	External Lead Reviewer
Reporting to:	Chair of Learning Review
Your Job is to:	To provide an external lens, lead and report on a multiagency Learning Review
Fixed amount:	
Duration:	Fixed contract of 10 days over 3 months

#### What you will do

- Work collaboratively and transparently with the Review Team Chair and members
- Attend the meetings of the Review Team
- Review and assess all information available to develop a full and multi-faceted understanding of the case
- Interpret and analyse the workings and shortcomings of complex, multi-agency systems
- Effectively facilitate group work and manage complex group dynamics
- Facilitate practitioner and manager events so that;
  - Participants understand the purpose of the Review as well as the underpinning principles and values of Learning Reviews
  - Trust is established between participants
  - All participants can voice their views in a safe manner
  - Discussion, debate, probing, and constructive challenge are encouraged
- Use a range of participatory and creative approaches to obtain the views and experiences of adults at risk of harm and their families/carers
- Pull together the learning and write the report, with the advice and guidance of the rest of the Review Team

#### Knowledge, Skills and Experience

The lead reviewer will have extensive practice experience of working within the area of public protection and reviewing complex multiagency cases at a senior level.

The lead reviewer will have a strong commitment to improving outcomes for children and adults at risk.

The lead reviewer will have the skills to create the preconditions for learning at both strategic and operational levels. They will apply a systems approach which seeks to examine, alongside the workforce, what within their practice context enables them to accomplish their tasks successfully and where the areas of weakness lie.

The lead reviewer will have a good understanding of trauma informed practice and apply this to their direct work with the Review Team, operational multiagency staff and individuals and families.

## Personal Profile

### Education and Professional Qualifications

Essential	Ideally	How we assess
<ul style="list-style-type: none"> <li>• Educated to a degree level or have an equivalent professional or managerial qualification</li> <li>• Excellent numeracy and literacy</li> </ul>	<ul style="list-style-type: none"> <li>• Post-graduate qualification in adult protection, child protection, mental health, or substance use.</li> <li>• Previous experience of leading a Learning Review or being part of a Review Team</li> <li>• Training certification in case review methodology</li> </ul>	Application form Interview

### Skills, Knowledge and Experience

Essential	Ideally	How we assess
<ul style="list-style-type: none"> <li>• An in-depth knowledge of policy and legislative frameworks for protecting people in Scotland</li> <li>• Ability to interpret and analyse complex multi-agency processes and information</li> <li>• Logical thinking with an ability to map out review process</li> <li>• Understanding of the context in which services are delivered.</li> <li>• Open minded, fair, a good listener and a logical thinker.</li> <li>• Organisational and good time management skills</li> <li>• Ability to meet timescales</li> <li>• Report writing skills</li> <li>• Presentation skills</li> </ul>	<ul style="list-style-type: none"> <li>• Experience of developing and setting out improvement priorities</li> <li>• Attention to detail</li> <li>• Project management experience</li> <li>• Experience of using MS Office packages</li> <li>• Experience of building relationships across partner agencies</li> </ul>	Application form Interview