

Case conference and meeting checklist

Prepare for the meeting or conference in advance by considering:

- Who should be invited to the meeting?
- Is it possible to prepare an agenda, which could be circulated before the meeting?
- What does the person chairing the meeting need to know beforehand?
- What preparation for the meeting could be helpful for the client and for others attending?

Prepare and distribute an agenda before the meeting including:

- Welcome and introductions
- Housekeeping, process and rules of the meeting
- Purpose of the meeting
- Information about the decisions the meeting can make
- Brief overview of background information and share current information and issues
- Develop the plan
- Summarise discussions

Inform and consult with clients

- Consult with clients, as well as other people, about suitable dates, time and venue

Include those who don't attend

- Participation should not be prevented because family members don't want to be or are not allowed to come to the actual meeting
- As well as writing, it is possible to give views by audio tape

Prepare the client beforehand

- Explain the purpose, who will be there and why, and what particular concerns will be discussed at the meeting
- Give help or advice to the client on how to prepare their own contribution
- Assist with practical problems they may have in attending, such as travel or child care arrangements
- Provide the client with any relevant documentation before the meeting

Prepare others too

- Ensure that all other participants are clear about the purpose of the meeting
- Distribute an agenda and other relevant papers
- Some agencies prepare a written report which they discuss with relevant parties before the meeting

Encourage representation

- Clients should be encouraged to bring a support person or representative with them
- For families whose language is not English a well briefed interpreter should be provided (this is not instead of a support person)

Encourage clear communications

- Encourage service providers to avoid jargon
- Ensure that everyone shares the same understanding of the decisions that have been made
- Ensure that the clients have a firm understanding, further explanations may be necessary after the meeting.