

PRACTICE LEARNING HUB

Assessment, Recording and Case Notes

Facilitator Guide: Better Recording and Team Calibration

Intended audience	Team managers, quality assurance leads, practice educators and ASYE leads
Estimated time	60-minute session (15 minutes preparation)
Sector	Adults and children's social care (adaptable)
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Intended use

This resource is for learning, reflection and discussion. It is not legal advice and does not replace local policies, statutory guidance or supervision.

Please do not discuss or record identifiable details about people, families, colleagues or live cases when using this resource.

About this session

This session uses two of Kayleigh Rose Evans' public videos - 'How To Write Better Case Notes and Assessments!' and 'Strengths-Based Social Work Recording' - to support a team conversation about recording quality, clarity and strengths-based language.

Recording is one of the most consequential things social workers do. As one lived-experience educator put it, what we write about people matters because it is often what remains when the social worker has gone. This session helps teams calibrate: what does a useful, respectful, defensible record look like here?

Videos are embedded on the resource page: kayleighroseevans.com/assessment-recording.html.

Learning outcomes

- Improve clarity and structure of recording
- Reflect on strengths-based language and the person's voice in records
- Consider rationale, evidence and professional judgement in written records
- Build shared expectations of recording quality across the team

Ground rules

All wording examples used today are fictional. Never bring real case records into this session.

We are calibrating standards, not auditing individuals.

Keep discussion general - no identifiable details about people or live cases.

60-minute session plan

Time	Activity
0-5 min	Welcome and framing: this is about shared standards, not individual criticism. Ground rules.
5-20 min	Watch 'How To Write Better Case Notes and Assessments!'. Ask people to note one habit they already have and one they want to build.
20-35 min	Before/after exercise: work through the fictional wording examples on the participant worksheet in pairs. What changes, and why does it matter?
35-45 min	Team calibration: as a group, agree the top five things that make a record useful in this team. Capture them - this list is a output worth keeping.
45-55 min	Watch 'Strengths-Based Social Work Recording' (or signpost for later if time is short). Discuss: where does strengths-based language belong in our records, and where must risk be stated plainly?
55-60 min	Close and CPD: one recording habit each person will change this week. Complete the reflection template.

Discussion prompt bank

1. Who are we writing for? What changes when we imagine the person reading their own record?
2. What is the difference between describing a person and describing a problem?
3. Where does professional judgement belong in a record - and how do we evidence it?
4. When does strengths-based wording risk softening genuine concerns - and how do we avoid that?
5. What do our best records have in common?
6. What gets in the way of good recording here - skills, time, systems or culture?

Facilitator tips

- Keep the calibration list visible and practical - five things, in plain language, that the team agrees on.
- If the conversation becomes about workload and time pressure, acknowledge it and capture it separately - it is real, but today is about what good looks like.
- Pair newer and more experienced practitioners for the wording exercise - both directions of learning are valuable.

Professional standards this resource supports

Mapping is indicative, to help you evidence CPD and connect the learning to professional frameworks.

Social Work England professional standards	Standard 2 (establish and maintain trust), Standard 3 (be accountable for the quality of my practice and the decisions I make), Standard 4 (CPD)
Professional Capabilities Framework (PCF)	Critical reflection and analysis; Skills and interventions; Professionalism

Quality assurance

Supports preparation for case file audit themes: voice of the person, rationale for decisions, clarity and proportionality

Using this with your team?

If your team, authority or university is using this resource, Kayleigh would love to hear how. Your feedback shapes future materials.

Share feedback: kayleighroseevans@gmail.com

To invite Kayleigh to deliver a live session linked to this resource, visit kayleighroseevans.com and use the speaking enquiry contact.