**Terms of Reference template**

The following is an example of a Terms of Reference for a SAR. It is intended as a guide and should be adapted to suit the case, and the type of review to be undertaken.

**Safeguarding Adults Review**

**Terms of Reference**

**1. Introduction**

A decision was made by the XXXX Safeguarding Adults Board to undertake a Safeguarding Adults Review on XXXX following the death/serious harm of an adult with care and support needs. For the purposes of this document, the adult will be referred to as Adult X. Adult X was aged X when they died. The Safeguarding Adults Board has a statutory duty to undertake Safeguarding Adults Reviews under section 44 of the Care Act 2014.

**2. Agencies involved**

The following statutory agencies were involved with Adult X:

XXX

Other agencies who may contribute to the Safeguarding Adults Review:

XXX

**3. Case summary**

<provide brief summary of the case>

**4. Purpose of the Safeguarding Adults Review**

The purpose of having a Safeguarding Adults Review is not to reinvestigate or to apportion blame, undertake HR duties or establish how someone died. Its purpose is:

* To establish whether there are lessons to be learnt from the circumstances of the case about the way in which local professionals and agencies work together to safeguard adults;
* To review the effectiveness of procedures (both multi-agency and those of individual organisations);
* To inform and improve local inter-agency practice;
* To improve practice by acting on learning (developing best practice);
* To prepare or commission a summary report which brings together and analyses the findings of the various reports from agencies in order to make recommendations for future action.

There is a strong focus on understanding the underlying issues that informed agency/professionals’ actions and what, if anything prevented them from being able to properly help and protect XXXX from abuse.

Further information can be found in the Safeguarding Adults Review Policy and Procedure <hyperlink to local webpage/document>.

**5. Terms of Reference: Key case issues**

At a meeting on XXX, the following key issues were agreed as being important and which should be considered within the SAR: <delete/amend/expand as appropriate to reflect the key lines of enquiry>

* Were practitioners sensitive to the needs of Adult X in their work, knowledgeable about potential indicators of abuse or neglect, and about what to do if they had concerns about an adult at risk?
* Did your agency have in place policies and procedures for safeguarding adults and acting on concerns about their welfare?
* What were the relevant points or opportunities for risk assessment and decision making in this case in relation to Adult X? Do the assessments and decisions appear to have been reached in an informed and professional way?
* Did action accord with assessments and decisions made? Were appropriate services offered or provided, or relevant enquiries made, in the light of assessments? Does it appear that all legal options were explored to safeguard the adult at risk?
* Where relevant, were appropriate Safeguarding Adults Plans (protection plans), risk assessments or care plans in place and were these plans implemented? Were there any factors present that prevented these plans being implemented successfully? Had review processes been complied with?
* Did your agency have any information to suggest that Adult X was being abused or neglected? If so, was this information appropriately acted upon?
* When, and in what way, were Adult X or their family’s wishes, feelings and views ascertained, considered and acted upon? Did action accord with the views expressed? Was this information recorded?
* Was practice sensitive to, and considered the impact of, any protected characteristics of Adult X?
* Were senior managers, or other agencies and professionals, involved at points where they should have been?
* Was work in the case consistent with agency and SAB policy and procedures for protecting adults at risk and wider professional standards?
* Please comment on any aspects of the case or the agency involvement that are examples of good practice.
* Are there any particular features of this case, or the issues surrounding the case, that you consider require further comment in respect of your agency’s involvement?
* What are the lessons from this case for the way in which your agency works to protect adults at risk and promote their welfare?
* Are there any aspects of SAB policy and procedures that need to be reviewed as a result of this case?
* Were staff provided with appropriate training in relation to safeguarding adults? Does it appear that training has impacted upon practice?

It was agreed that the timeframe for the Safeguarding Adults Review would be **XX – XX**. <insert any reasoning behind choosing this timeframe>

Any information from before this timeframe will be used to provide background information for this Safeguarding Adults Review.

<State whether the review will consider/explore information relating other individuals not subject to the SAR e.g. alleged perpetrators>.

**6. Process for undertaking Safeguarding Adults Review**

Provide a summary of the methodology chosen and any key activities/events/stages of the SAR, including dates where possible.

**7. Safeguarding Adults Review Panel Membership <if established>**

A panel will be established that will oversee the Safeguarding Adults Review for Adult X. The panel’s role will be to quality assure the process and products (including IMR reports and the final overview report). Panel members need to be of sufficient seniority to be able to provide challenge as well as agree any recommendations.

The Safeguarding Adults Review Panel’s membership will consist of:

* All those agencies completing IMRs (representative may be SAR Committee member OR IMR author OR other nominated senior member of staff)
* Specialists in XX
* A legal advisor

**8. Involvement of Adult X or their family**

Adult X’s/family have been notified of the intention to undertake a Safeguarding Adults Review. Adult X’s/family will be fully involved in the Safeguarding Adults Review to the extent that they wish. <Add any further details specific to the case about the adults/family involvement>

**9. Involvement of key staff and volunteers**

The review will seek to hear the perspectives of all key staff and volunteers by <insert how this will be done>.

The SAR Committee/Panel member from each agency is responsible for identifying and notifying relevant staff and volunteers of this SAR and facilitating their involvement.

The SAR Committee/Panel member from each agency is responsible for ensuring relevant staff and volunteers are provided with a safe environment to discuss their feelings and offered emotional support where needed, including counselling or other therapeutic support.

**10. Coroner and Crown Prosecution Service (CPS) considerations**

The Coroner has been notified of the intention to undertake a Safeguarding Adults Review and is happy for the review to proceed. The Coroner’s Inquest will not take place until criminal proceedings have concluded. Terms of Reference will be shared with the Coroner and any other information as requested/necessary. <Only applicable if the adult has died>

The Police have agreed that the Safeguarding Adults Review can proceed alongside any possible criminal proceedings. The Independent Reviewer and Safeguarding Adults Review Committee will liaise with the Senior Investigating Officer to ensure that the criminal process is not jeopardised. The Senior Investigating Officer will liaise with the CPS. <Amend as appropriate>

**11. Safeguarding Adults Review timescales**

The review should be completed within six months as per the timeline outlined above in section 6. This timescale may be subject to change depending on any impact of criminal proceedings.

**12. Communications**

XX Council are the lead agency in relation to communications about Safeguarding Adults XX Council. Any approaches made to other agencies should be directed to XX Council. There will be no public statements about the Safeguarding Adults Review until criminal proceedings have concluded.

Other key stakeholders that will need to be updated as appropriate:

* …
* …

**13. Links to other review processes**

Identify any other review processes (e.g. SCR, DHR, SUI, LeDeR) of relevance to the case and arrangements for coordinating these processes and ensuring learning is shared.