

Shortlisting And Linking Process

Part 1: Shortlisting Process

The **Family Finding social worker** should complete a Teams Site Request Form for the **Family Finding Business Support** to set up the child's Team Site for collaborative working.

Shortlisting Process:

Completed by the Family Finding social worker:

- Focusing on the needs of the child using the matching criteria the **family finding social worker** will profile the child and shortlist to 3 prospective families
- This process will include discussions with the assessing social workers
- The **family finding social worker** will then share with the local authority social worker on TEAMS the Prospective Adopters Report's (PAR) – outlining the strengths and vulnerabilities for each family within part 1 of the shortlisting form
- The **family finding social worker** when sharing the PAR's will also book a shortlisting meeting with the Local Authority Social worker within **5 working days**.
- If the shortlisting meeting is not held within the agreed 5 working days the **family finding social worker** should record on child record reasons for delay and notify the family finding team manager.

Completed by the Local Authority social worker:

- The **Local Authority social worker** should prioritise shortlisting meeting within the 5 working days.
- The **Local Authority social worker** reads the shortlisted PAR's within **3 working days**.
- The **Local Authority social worker** should request any further information, if required, prior to the shortlisting meeting

Formal Shortlisting Meeting (within 5 days of receipt of PAR's):

- **Family Finding social worker** and **Local Authority social worker** to discuss the shortlisted PAR's and record the strengths, vulnerabilities and areas to be explored at the home visit in Part 1 of the shortlisting form. (bath spa matching tool can be used) - complete Part 1 shortlisting record
- The **Local Authority social worker** and **Family Finding social worker** recommend which prospective adopter/s to progress to a home visit within **5 working days**.
- The **Family Finding Social Worker** to confirm with the **Local Authority social worker** provisional dates for matching meeting and matching panel.
- The **Local Authority Team Manager** to sign off Part 1 of the shortlisting form.
- The home visit cannot take place without Local Authority Team Manager sign off. • The **Family Finding social worker** should update the child activity report and chronology in eclipse.

Feedback to shortlisted families

- Where the decision is not to progress to a home visit the **Family finding social worker** will feedback the analysis from the shortlisting meeting to the adopters social worker within **2 working days**. (Copying in the adopter's social workers Team Manager).

- Where the adoptive family is from another adoption agency the **Family finding social worker** will feedback the analysis from the shortlisting meeting to the adopters social worker within **2 working days**. (Copying in the Family Finding Team Manager).

The **Family Finding social worker** should delete the adopters information within the TEAMS site for families not progressed to a home visit.

Part 2: Linking Process

The Home Visit:

The **Local Authority social worker**, **Family Finding social worker** and **Adopters social worker** will undertake a home visit to discuss the potential match between the child/ren and adoptive family. Areas of exploration may include the following;

- The areas which were identified to be explored within the shortlisting meeting.
- Summary of child's history, health needs and significant events
- Child's understanding of why they are living in foster care
- The foster carers report – the rewards and challenges of parenting the child
- Adopters ability to meet the child's needs
- Do the adopters have a realistic expectation of the child?
- The home environment and their support network
- Ability to promote the child's life story work and promote their ongoing birth family relationships (contact/direct contact)
- Support needs, therapy, financial /allowances/one off payments

There may be other areas to explore e.g. if the adopters' matching preferences have changed from the time they were approved.

Within 2 working days of the Home Visit

Outcome/Recommendation: The **Local Authority social worker** and **Family Finding social worker** to complete in the shortlisting and matching form the record and analysis of the home visit and complete the Bath Spa Matching tool. The Bath Spa matching tool will provide evidence of the strengths and vulnerabilities and areas to be considered within the adoption support plan (if proceeding to matching).

Where the social workers recommend no progression to Matching meeting:

- **Local Authority social worker** formalises agreement from Team Manager not to progress to matching meeting – **Local Authority social worker/Team Manager** to record decision on childcare record
- **Family Finding social worker/Adopter's social worker** to feedback to adopter/s and Adopter's social worker to record on the adopter record

Where the social workers recommend progression to Matching meeting

- **Local Authority social worker** seeks formal agreement from Team Manager to progress to matching meeting and the **Local authority Team Manager** signs off Part 2 of the linking form – Part 2 of the linking form.

The **Family Finding social worker** should update the child activity report and chronology in eclipse.

Part 3: Matching Meeting Process– Decision to progress to Matching Panel

Preparation for Matching Meeting:

- It is expected that the **Local Authority social worker**, **Family Finding and Adoption social worker** should meet to prepare the child's Adoption Placement Report (APR) and Adoption Support Plan (ASP) within the TEAMS site
- The **Family finding social worker** is responsible for ensuring that the completed and updated versions of the APR, ASP, ADM, PAR (part 1 &2), adopters panel minutes, CPR, medical and carers report child should be available within the TEAMS site **2 working days** prior to the matching meeting.
- The **Family finding social worker** should notify the **Adoption Team Manager** if reports are not available 2 working days prior. The **Adoption Team Manager** will then review all reports and decide if the matching meeting will proceed or be deferred.
- Where the decision is to defer due to outdated or missing information the **Adoption Team Manager** will record rationale on child/ren eclipse record and notify Local authority Team Manager.

Matching Meeting:

- Required attendees chaired by an **Adopt South West Team Manager** are the **Local Authority social worker**, **Adopter's social worker**, **family finding social worker**.
- The matching meeting is to review and analysis if the adopter/s can be supported to meet the needs of the child/ren and ensure all the information that needs to be shared with the adopters is in place and available to inform their decision.
- The matching meeting will formalise the link between the child/ren and adoptive family.

The meeting will identify and agree further information/meetings to be put into place such as adopters meeting the medical advisor/education/foster carers/consideration or pre meets prior to panel. If out of region adopters please also follow the process for updated health information [Process for Health Declaration forms for out of region adopters 2025 \(1\).docx](#)

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- If the **Local Authority Team Manager** does not attend the matching meeting then they should sign off the decision of the meeting within **2 working days**.

- Following the matching meeting the **Adopt South West Team Manager** will add the outcome and actions of the matching meeting to the child's eclipse and record the meeting in the child/ren chronology,

Outcome/Recommendation of matching meeting:

The chair will complete part 3 of matching meeting form.

Where the decision is not to progress to Matching panel:

- The **Local Authority social worker/Team Manager** record decision on Local Authority childcare record rationale for not progressing to matching panel
- **Family Finding social worker/Adopter's social worker** to feedback to adopter/s and record rationale on the Adopt South West child and adopter record

Where the decision is to progress to Matching panel:

- The **Local Authority social worker/Team Manager** record decision on Local Authority childcare record rationale for progressing to matching panel
- The **family finding social worker** will confirm the matching panel booking (this should be within **8 weeks** of the matching meeting).
- The **Local Authority**, **Adopter/s** and **family finding social workers** need to update and finalise the APR and ASP within **two weeks** of the matching meeting.

Prior to matching panel

- The **Local Authority**, **Family Finding** and **Adopter's social worker** review the APR and ASP within the Teams site to confirm as the final version. The adopters guidance to be shared with them at the earliest opportunity.
- The **Adopter's social worker** shares with the adopter/s and supports them to completion their section and sign off (Adopters should have 10 days to read, complete and sign).
- The **Adopter's social worker** uploads the adopter updated APR and ASP to the Team's site and removes the previous version and notifies for sign off by all social workers and relevant team managers.(The deadline is 3 weeks for submission of papers to matching panel)
- The **Local Authority social worker** is responsible for sending through all of the child/ren information and adoption placement report to adoption matching panel.
- The **adopters social worker** is responsible for sending through all of the adopters information to adoption matching panel.

[Guidance for Documents required for Panel.](#) – All panel paperwork should be sent to the adopt south west panel - mailbox childsc.adoptsouthwestpanel-mailbox@devon.gov.uk

Responsibility matrix

	LA Team Manager	LA Social Worker	ASW Social Worker	ASW Business Support	Adopters social worker	ASW Family Practitioner	ASW Team Manager	FC supervising social worker	Comments	Date
Preparation of the child (ren) What is the Local Authority plan for preparing child(ren)?		X								

Arrangements for farewell contact (should take place prior to matching panel)		X								
Adoption Allowance	X	X								
Organise the foster carer meeting			X							
Facilitate foster carer meeting					X			X		
Organise Medical advisor meeting			X							
Attend the medical advisor meeting					X					
Organise Pre-meet		X								
Organise the nursery/ school meeting		X								
Attend the nursery/ school meeting					X					
Organise CAD				X						
Completion of a ASF application			X			X				
CPR – updated		X								
Organise a birth parent meeting with adopters		X								
Birth parent support (LA SW to refer to ASW)						X				
Adoption support plan (ASP)		X								
Completion of the Adoption placement report APR		X	X		X					
Notify finance and complete interagency form			X							
QA and sign off of the APR & ASP	X						X			
Draft child/ren adoption transitions plan	X		X							
Complete child/ren adoption placement report			X							

