



Guidance for the Completion of Individual Management Reviews for agencies

In line with Sec 45 of the Care Act 2014, agencies with knowledge or contact with the adult subject to a safeguarding adult review will be requested to secure all records and to complete a chronology and/or Individual Management Review.

The Individual Management Review (IMR)

Each organisation that is required to complete an Individual Management Review will need to: -

- Appoint a manager from within their organisation (or an independent person) to undertake the task of completing the IMR. This person should not have been directly involved with the adults care and support, or be the immediate line manager of the practitioners involved.
- Ensure that all relevant files are secured and made available to the IMR author.
- Ensure the IMR author is allocated adequate resources (time, admin support) to complete their report within the required timescales. It is imperative that timescales are adhered to so that the role and actions of all agencies involved with the adult can be collectively reviewed by the learning and review subgroup and support robust decision making.
- Make the chronology and IMR template available to the IMR report author, as these must be used for the compilation of the IMR to ensure consistency.
- Notify the staff involved with the adult and be provided the opportunity to discuss their understanding of what has happened. It is essential that support and counselling be offered where required.

Role of Individual Management Review Report Author

- The report author should interview the professionals from their organisation who have had recent or relevant involvement with the adult. This should be arranged in consultation with their line manager. The report author should ascertain, in consultation with the line manager, that the member of staff is receiving or has

received the appropriate support in relation to that member's own welfare if this is needed.

- This meeting should give the report author the opportunity to check with the member of staff the factual accuracy of the details of the chronology. It will also be an opportunity for staff to identify good practice and any lessons they consider can be learnt from their own and their organisation's involvement. A written record of the interview should be made and should be shared with the interviewee.
- The purpose of the IMR is to look openly and critically at individual and organisational practice, in the context of the environment and information known at the time, to see whether the case indicates that changes could or should be made and, if so, to identify how those changes will be brought about.
- The IMR report author should complete the chronology and report on the HSAB template, and a copy should be sent to the senior manager in their organisation for their acceptance on behalf of the organisation, before it is returned to the safeguarding adult review coordinator by the given deadline.
- The senior manager within the organisation will be responsible for ensuring that the recommendations contained within the IMR are acted on.
- Safeguarding adult reviews are not part of any disciplinary process. If the report author comes across information which is considered a matter which needs investigation under disciplinary procedures this should be brought immediately to the attention of the individual's line manager/senior manager.