

Annual Reviews:



What you need
to know...

Aims of the session:

To understand the Annual Review Process: What is an Annual Review?

What are the different sections of an EHCP?

To understand the legal basis for the Annual Review Process.

To understand how to schedule Annual Reviews, within LA time-frames.

To understand who can be invited to an Annual Review.

To understand the documents/ information/ reports needed by the school, for an Annual Review meeting.

To understand the process for holding Annual Reviews early.

To understand Phased Transfers, and when they take place.

To understand the need for a Child-Centred approach.

To understand how to complete and read Annual Review Reports.

Annual Review Definition:

The review of an EHC Plan, which the Local Authority must make, as a minimum, every 12 months.

It is not just a meeting with parents but a legal process, which must be followed, in order for it to qualify as an Annual Review.

The Annual Review concludes when the Local Authority makes the decision whether to maintain, amend, or cease the EHC Plan.

Section	Description
Section A	
Section B	
Section C	
Section D	
Section E	
Section F	
Section G	
Section H	
Section I	
Section J	
Section K	

TASK 1

Can you match the different EHCP sections with their descriptions?

Bonus Question:

Which Section(s) can parents/carers appeal?

Sections of the EHCP- Answers

Section A = Views and Aspirations of the child and their parents/carers

Section B = Overview of the child's Special Educational Needs (SEN)

Section C = Details of health care needs which relate to the child's SEN

Section D = Details of social care needs which relate to child's SEN

Section E = Outcomes (targets for improvement, usually over the Key Stage)

Section F = Specialist Educational Provision to be put in place (by the LA, and therefore the school), in order to meet the outcomes

Section G = Health Care provision (not part of LA/school remit)

Section H = Social Care provision

Section I = Placement (setting)

Section J = Direct Payments (personal budget)

Section K = Copies of professional reports and other evidence, obtained as part of the EHC Needs Assessment

Bonus Answer – Parents / Carers can only appeal Sections B, F and I.

Reviewing an EHCP - Legal References

- 1. Section 44 of the Children and Families Act 2014:
<https://www.legislation.gov.uk/ukpga/2014/6/part/3/enacted>
- 2. Regulations 2, 18, 19, 20 of the SEND regulations 2014:
https://www.legislation.gov.uk/uksi/2014/1530/pdfs/uksi_2014_1530_en.pdf
- 3. The SEND Code of Practice 0-25 2014: (pages 194- 207)
[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/398815/SEND Code of Practice January 2015.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/398815/SEND_Code_of_Practice_January_2015.pdf)

[Explanatory Notes](#) ?

[Impact Assessments](#) ?

[More Resources](#) ?

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[Plain View](#)

[Print Options](#)

Status: This is the original version (as it was originally enacted).

33 Children and young people with EHC plans

- (1) This section applies where a local authority is securing the preparation of an EHC plan for a child or young person who is to be educated in a school or post-16 institution.
- (2) In a case within section 39(5) or 40(2), the local authority must secure that the plan provides for the child or young person to be educated in a maintained nursery school, mainstream school or mainstream post-16 institution, unless that is incompatible with—
 - (a) the wishes of the child’s parent or the young person, or
 - (b) the provision of efficient education for others.
- (3) A local authority may rely on the exception in subsection (2)(b) in relation to maintained nursery schools, mainstream schools or mainstream post-16 institutions in its area taken as a whole only if it shows that there are no reasonable steps that it could take to prevent the incompatibility.

Annual Review Scheduling: When is the Annual Review meeting meant to take place?

- An Annual Review must be completed, for all EHC Plans, within 12 months of the date of the first issue of the EHC Plan and, after that, within 12 months of the date of the last review.
- Kent recommend that a review meeting is held 6 weeks after the EHCP is issued.
- Therefore, **schools should hold the Annual Review meeting 10 months** after the EHCP was issued, or 10 months since the last meeting, to enable the Annual Review process to happen within statutory time frames.
- For Looked After Children, the Annual Review should, if possible and appropriate, coincide with the Personal Education Plan (PEP).
- It is recommended that **Annual Reviews are calendared** in advance of the school year.



Discuss: Who do you invite to an Annual Review?

The Person arranging the review meeting (usually the SENCO) must obtain advice and information about the child or young person from the individuals highlighted in blue.

- Child or Young Person
- Parent / Carer/ Corporate Parent
- Head Teacher / SENCO/ Other appropriate representative
- Class Teacher / Form Tutor/ Subject Teachers
- 1:1 support (if appropriate)
- Specialist Teacher (STLS, if appropriate)
- Local Authority Case Worker (they are not able to attend every annual review meeting)
- Local Authority Provision Evaluation Officer (PEO, optional)
- Health Care Professional (if appropriate) SALT, OT, School Nurse
- Early Help Worker (if appropriate)
- Social Care Team (if appropriate)
- IASK representative (if appropriate)
- Anyone else the school, parents/carers, child/young person feel is appropriate
- Advocate, if appropriate

Which documents / information do you require for the Annual Review Meeting?

- Current EHC Plan
- Section A (Parent View)
- Child View
- Current provision plan (fully-evaluated, usually 3 times)
- Information about the student's progress and how they are accessing teaching and learning
- New provision plan with proposed targets
- High Needs Funding information / Pupil Premium information
- Attendance Information
- Annual Review Meeting Form
- Evaluation Form



Annual Review Meeting for Education, Health & Care Plan for

Insert student name

Insert date of birth

Insert academic year

Date of this review Meeting.	Click here to enter a date.
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<https://www.kelsi.org.uk/special-education-needs/special-educational-needs/deleted-documents/education-health-and-social-care-plans/annual-reviews>



Annual Review Process for Schools and Educational Settings in Kent

The Review Meeting

- **Invitations** to attend the review meeting need to be sent out to all concerned, at least (and not less than) two weeks in advance of the date of the meeting.
- Contributors, including those unable to attend, will be asked to provide a **written report regarding progress**. These need to be shared with participants two weeks in advance of the meeting.

Date: _____

Annual Review Invitation:

Dear Parent/ Carer of _____

I would like to invite to your child's Annual Review on _____ at _____ a.m./p.m. in the Inclusion Office.

Please sign in at the school office on arrival in school.

The meeting should last between 1 and 2 hours, and will provide an opportunity to review current targets and provision, and to raise any questions you may have with myself and the class teacher.

Please find enclosed:

- A copy of the Section A (which helps us gather your views as the parent/carer)
- A copy of your child's current Educational Health Care Plan.
- Any reports from external professionals who may be attending the meeting (for example, from _____ our Speech and Language Therapist). This may not be applicable for all children.
- A report from school.
- Your child's latest annotated Provision Plan.
- A Social Story, for you to read with your child.

It would be useful if you could bring this documentation along to the meeting. The documentation is sent out in advance of the meeting in order that you have time to read it and raise any issues you would like to discuss.

If your child has received a further diagnosis since their last Annual Review, or if the plan is less than a year old, please bring any paperwork or supporting evidence from the relevant professionals, so we can take copies to attach to the Annual Review paperwork and ensure we have the most current information.

It would be very helpful if the Section A could be completed and sent back to me, by _____. If you would prefer to type it, an electronic copy of the form can be found at: <https://www.kelsi.org.uk/special-education-needs/special-educational-needs/annual-reviews>

Download the 4th option "section A - pre 16". This can then be emailed to the school office in advance of the meeting, at XXXX@kent.sch.uk.

I also recommend that, if you have concerns about the process, or it is your first Annual Review, that you may like to seek some support from IASK. They can provide information and support at each stage of the Review process. This usually includes explaining the process, helping you to prepare for the Annual Review, and supporting you in the meeting. This guide may be useful: <https://www.iask.org.uk/assets/booklets/12.Annual-Review-of-an-Education-Health-Care-Plan.pdf>

Please complete the slip below, confirming whether you are able to attend.

I very much look forward to meeting with you.

Yours Sincerely,

Mrs/Ms/Mr XXXX

Child's Name: _____ Class: _____

I am able to attend the Annual Review on _____ at _____

I am not able to attend the Annual Review on _____ at _____

I will be accompanied by ...

I will require:

- An interpreter
- Wheelchair access
- Baby change facilities
- Therapy Dog
- Large Print versions of documents
- Coloured backgrounds for screens
- Other (please list in box below)

Signed

Early Annual Reviews

In some situations, parents / carers may ask the school and Local Authority for an Early Annual Review.

This may be because they feel there is a significant change to the plan needed:

- Seeking another diagnosis (Section B)
- Provision no longer meeting the child's needs (Section F)
- Section I (placement) needs to be reviewed.

The LA can refuse the request for an Early Annual Review.

Phased Transfer Review meeting

Preparing for the Annual Review Meeting: Logistics to consider...

SENCO to consider **where** the meeting will take place, to get the best outcome. (Do you need to book a room?!) Choose a space where people have enough space to sit and write comfortably, and see and hear each other. Can the Annual Review be virtual?

SENCO to **check IT works** and, if not, ensure documents are printed, so everyone has a visual of all the documents being discussed.

Is there **cover** to ensure the Class Teacher/ Form Tutor and 1:1 TA can be part of the Annual Review meeting?

If the pupil is year 10 / 11, it can be useful to have the **Careers Advisor** attend.

Allow enough time - Annual Reviews usually take 1-2 hours. Make sure everyone is aware of this prior to the meeting.

Will the school offer **refreshments**? Can be a good ice-breaker, and put parents/carers at ease. (At the very least, have water and a box of tissues to hand - some parents can become emotional when talking about their child's challenges or achievements.)

It can be a good idea to do a quick **accessibility test** with parents (do they need special accommodations; eg, interpreter / wheel chair ramp / large print?).

Person-Centered Approach

How to prepare the child or young person for their Annual Review:

How can the C/YP be included in their review meeting?

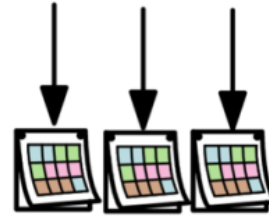
My Annual Review Meeting



2021

1

Every year, my school holds a meeting about me.



It is called my Annual Review meeting.



3

Everyone will talk about what is going well for me.

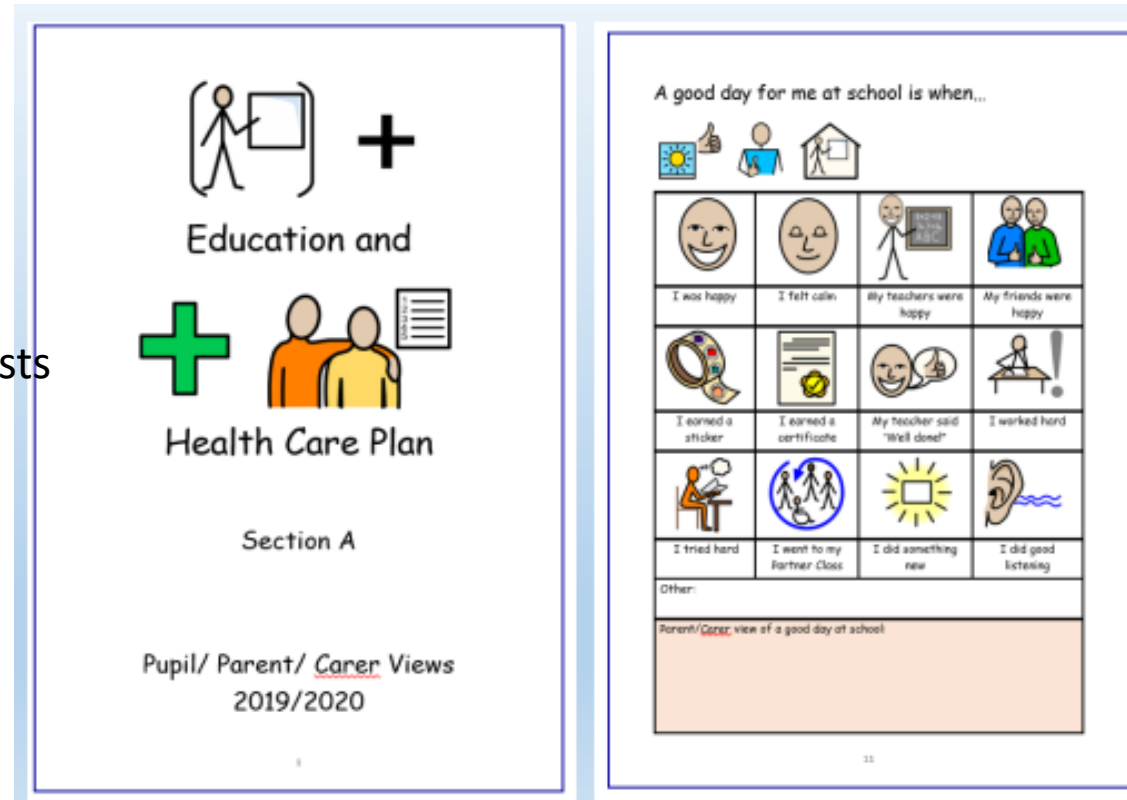


They will also talk about things that I am finding tricky.



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- Annual Reviews
- Mid-Year Reviews
- PEP Reviews
- EHC Needs Assessment requests
- Pupil Passports



Section A - Pupil Voice (alternative)

Some young people find it hard to process questions and provide responses. As a consequence, their views and opinions can be assumed, rather than gathered effectively. Here are some suggestions for gathering pupil voice.

Section A: Pupil Voice (alternative) Card Sorts

Help show us, using visuals

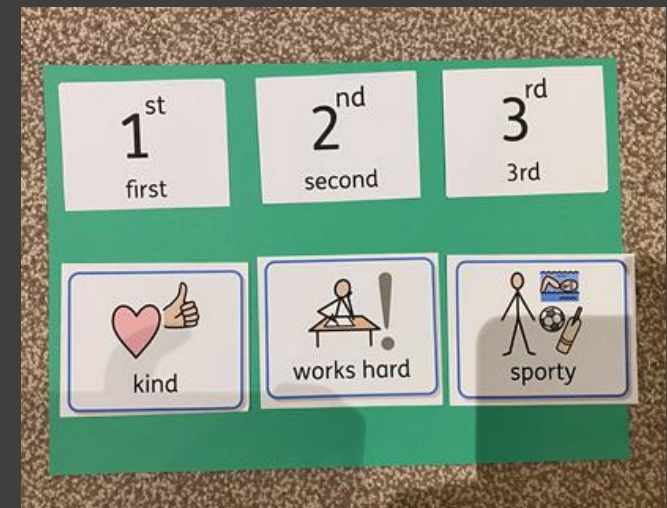
Strengths and Challenges





Section A - Pupil Voice (alternative) Card Sorts – Help show us, using visuals

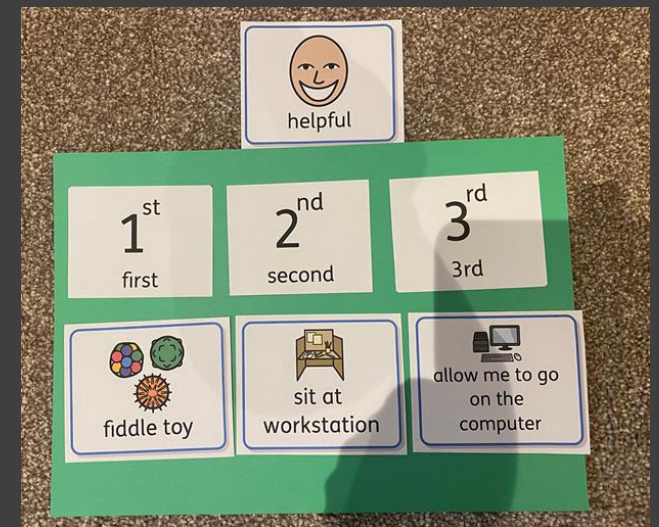
- Strengths

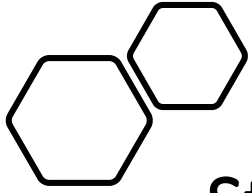




Section A - Pupil Voice (alternative) Card Sorts – Help show us using visuals

- Helpful Strategies
in class:





Student View: Which subjects do I like / dislike?

XXX said that he did not like speaking to his partner in English. He also said he found the work difficult to understand. However, he said that he enjoys reading and listening to a story.

XXX reported he does not like music assembly, as it is too loud, and he does not like celebration assembly as sometimes you have to go to the front.

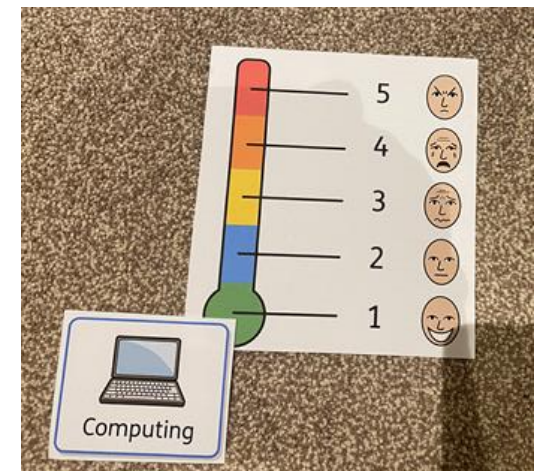
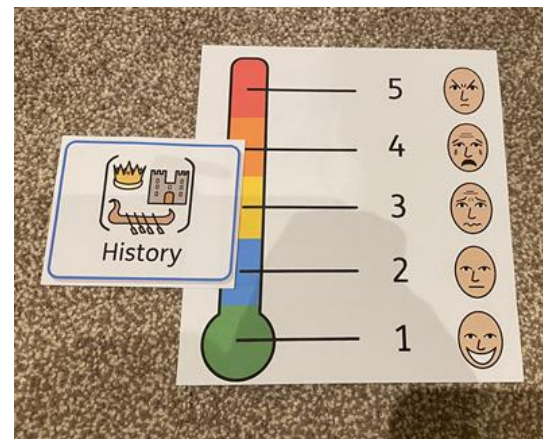
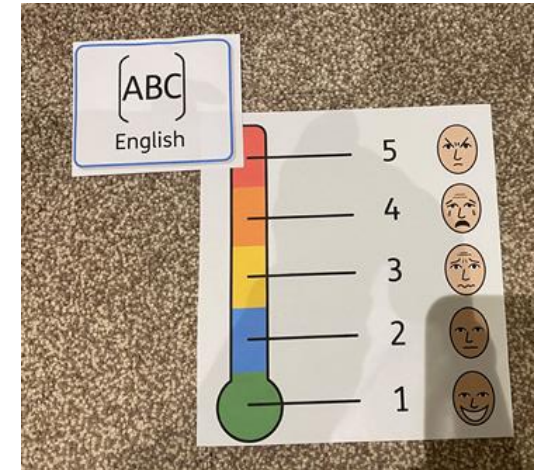
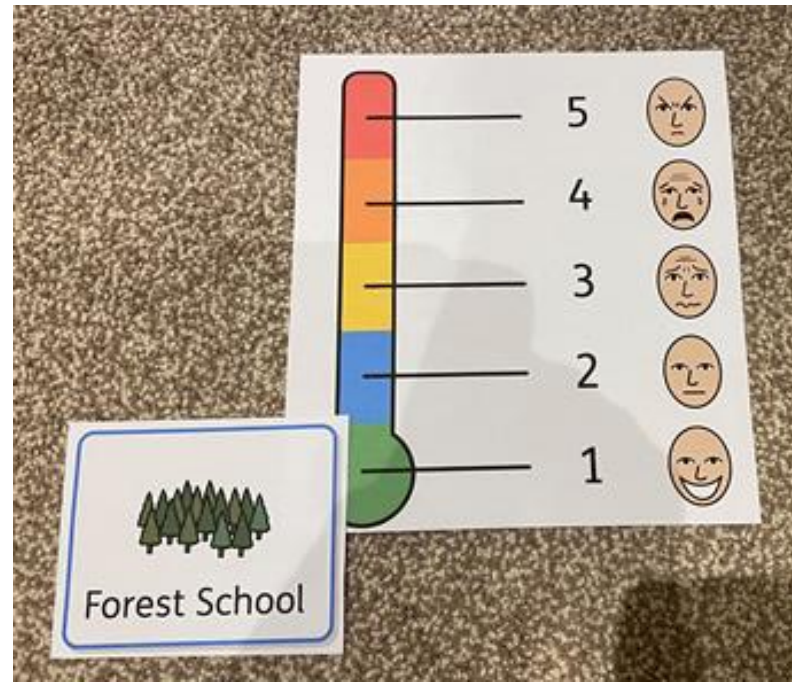
XXX said he likes lunchtimes, on the days he brings a packed lunch.

He only sometimes likes Science. He does not like finding out about the inside of the body.



Visual Scaling

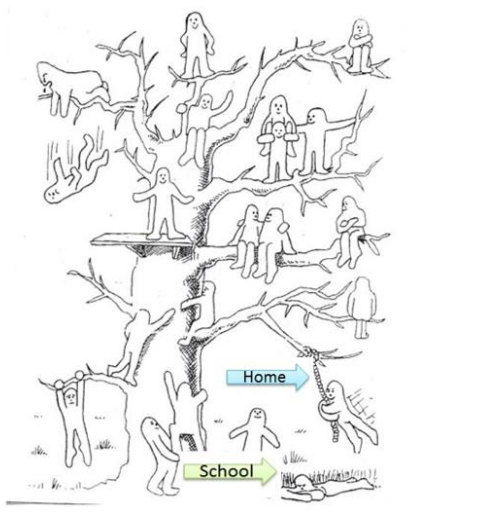
- How good are you at...?
- If History is a two, where would you put Geography?
- Are there times when you like History more than three?
- If English is a five, where do you think your teacher would put you?



Section A - Pupil Voice (alternative)

The blob tree

This is called **the blob tree**.
Can you use the arrows to show me how you feel when you are at home and when you are at school.

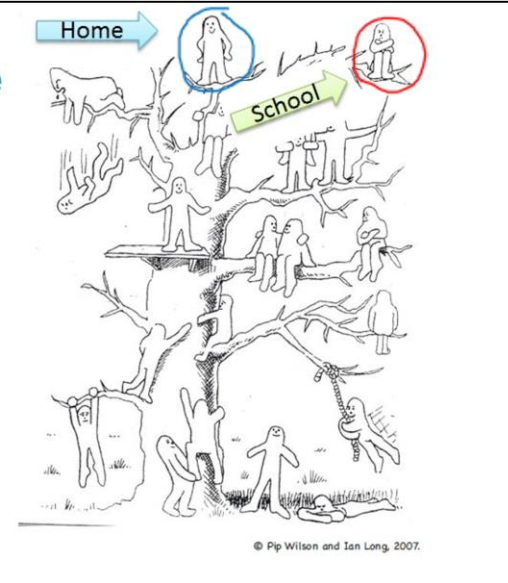


XXX chose the blobs to illustrate how he felt about home and school, but could not express why he had chosen them.

The blob tree

This is called **the blob tree**.

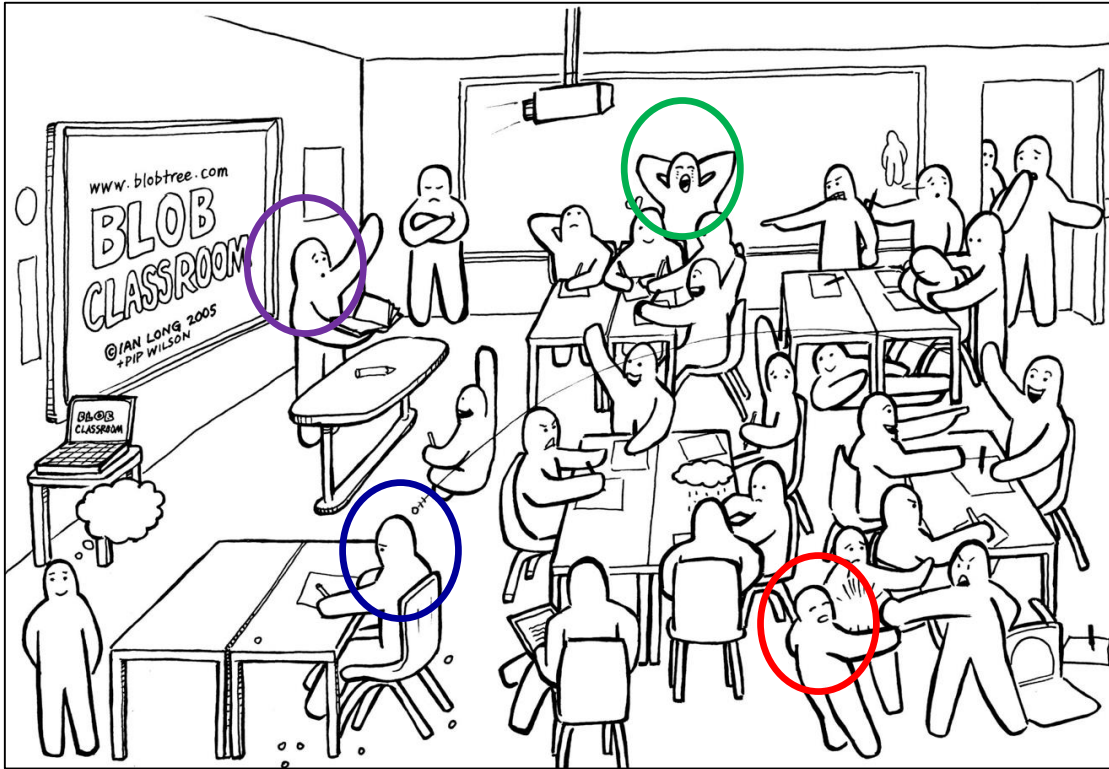
Can you use the arrows to show me how you feel when you are at home and when you are at school.



XXX indicated that the 'blob' in the blue circle above, as representing him at home, because it is happy.

The red circle indicated the blob at school, because it was angry.

Section A - Pupil Voice (alternative)



Which blob would best describe you at school?

Which blob would your teacher pick to describe you at school now?

Which Blob would a friend / peer pick to describe you now?

Which blob would you *like* to describe you at school?

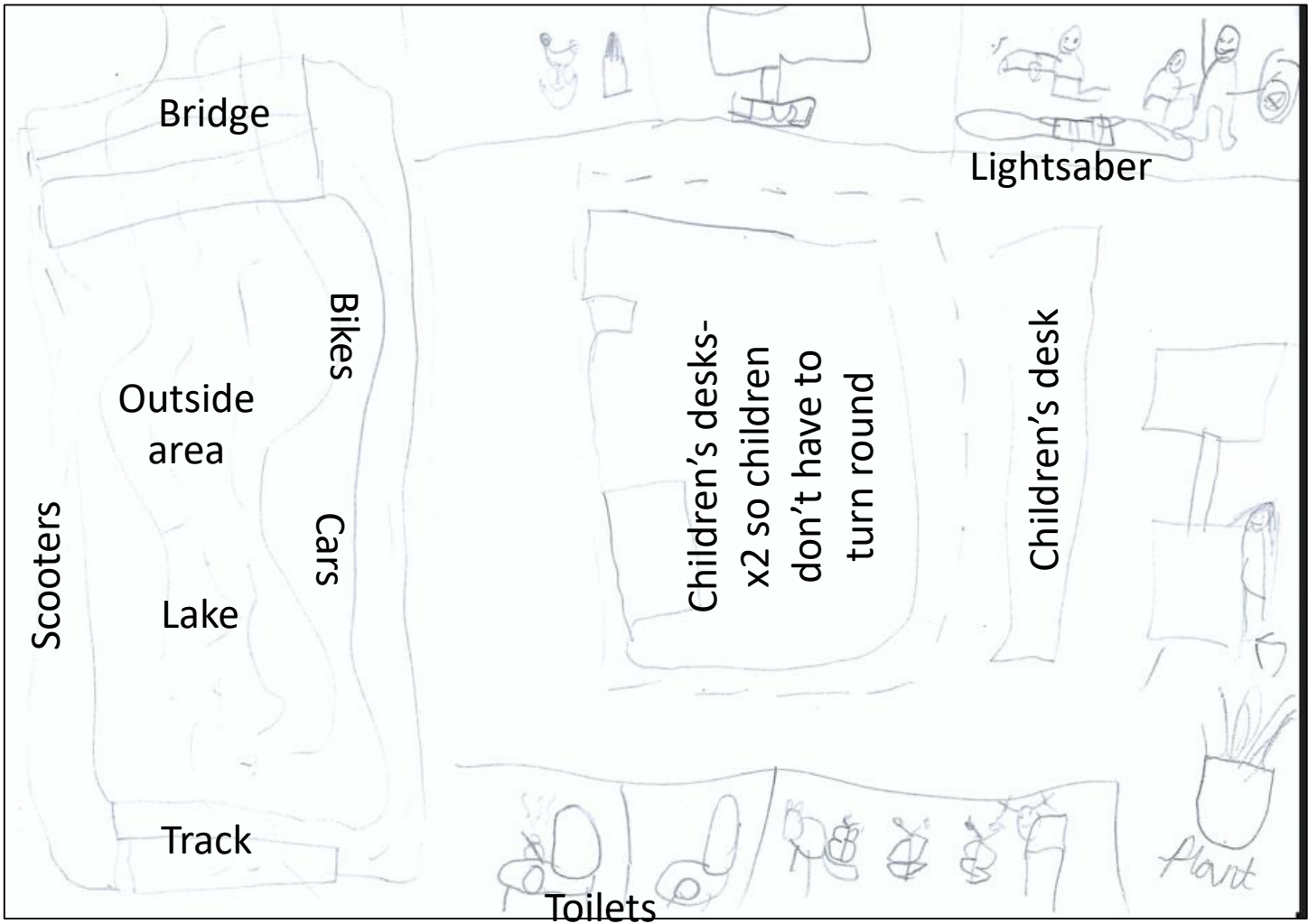
In the drawing above, XXX indicated that he would like to be the teacher. He said his friends saw him as “chilled” and his teacher would think of him as sitting down, doing his work. When asked which blob represented him at school now, he choose the blob being punched. XXX said he would like to be a teacher when he grows up.

Snack and
Drink Room

Computer
Room

Play
Room

The Ideal Classroom



Toys

Teacher's
Desk

Plant called Bob

Classroom Rules:

- 1) No cheating
- 2) No pushing people into the lake
- 3) Be kind
- 4) Be happy
- 5) Eat healthily
- 6) Have doughnuts and ice lollies for pudding

Animals and
butterfly room

Dog

Toilets

Track

Lake

Cars

Outside
area

Bikes

Scooters


Lightsaber


Children's desks-
x2 so children
don't have to
turn round


Children's desk


Child- / Young Person- friendly Targets


XXX's Goals and Aspirations

Communication	
<i>Goal:</i> I can talk confidently to other people about myself so I can make good friends	
<i>How people can help me:</i> <ul style="list-style-type: none"> - Help me to think about how other people are feeling - Help me to find someone to play with at break times - Remind me not to tell my friends what to do - Ask me to give messages to other classes 	

Learning	
<i>Goal:</i> I can start my maths work by myself	
<i>How people can help me:</i> <ul style="list-style-type: none"> - Help me to listen properly to the teacher - When I am ready, give me a 5 minute timer for independent work 	

Social Emotional	
<i>Goal:</i> I can explain how I am feeling and what will help so I can be calm	
<i>How people can help me:</i> <ul style="list-style-type: none"> - Ask me what will help when I am worried - Let me read my social story and talk with me about my feelings 	

Sensory / Physical	
<i>Goal:</i> I will know how to keep myself safe and clean	
<i>How people can help me:</i> <ul style="list-style-type: none"> - Remind me of which things are private and which are not - Remind me of what is safe and what is not safe - Help me to learn to wash by myself 	

STUDENT'S Aspiration	
<i>Goal:</i> I want to run an amusement park called Toy Story Land with hotels, gift shops, fancy rides, nice restaurants and a play area for little children.	
<i>How people can help me:</i> <ul style="list-style-type: none"> - Tell me about jobs I could do in catering? - Tell me more about the leisure industry? 	

Annual Review Report / Form

What does the school need to do after the Annual Review meeting?

Ensure all supporting documents are attached, and send a copy of the Annual Review form to everyone invited to the meeting, and the LA, within two weeks of the meeting taking place.

o Section A

o Evaluated
Provision Plans

o Draft
Provision Plans

o Reports from
Professionals

o Records of
Visits from STLS,
if appropriate

o Behaviour
Plan, if
appropriate

o Risk
Assessment, if
appropriate

o Care Plan, if
appropriate

o PEEP, if
appropriate

o Send out
Evaluation Form

Please note that the government has stipulated that “EHC Plans are not expected to be amended on a very frequent basis” (SEN&D C o P JAN 2015).

THE EDUCATION HEALTH AND SOCIAL CARE PLAN **ANNUAL REVIEW**

Education, Health and
Care Plan Annual
Review Animation

- https://www.youtube.com/watch?v=D9n5EzYlwKA&feature=emb_logo&ab_channel=WatchCDC