

Barking and Dagenham Guidance on completing an Annual Review of a Statement of Special Educational Needs or for an Education, Health and Care Plan and Annual Review Report template



Guidance on completing an Annual Review of a Statement of Special Educational Needs or for an Education, Health and Care Plan

It is the local authority's statutory duty to complete an annual review for every child/ young person with a Statement of Educational Needs or an Education, Health and Care Plan.

Plans must be reviewed, as a minimum, every 12 months. In some circumstances reviews might have to be carried out earlier (for example for children below statutory school age or due to significant change in needs).

Reviews should:

- Focus on and monitor progress towards objectives/outcomes and longer term aspirations
- Consider if outcomes and supporting steps remain appropriate
- Gather information about strengths and needs across education, health and care (as relevant)
- Assess effectiveness of provision in meeting the child/young person needs
- Set new interim targets for the coming year and where appropriate agree new outcomes
- Review health and social care provision made for the child/young person and its effectiveness in ensuring good progress towards outcomes
- Consider the continuing appropriateness of the Statement of SEN/ EHC Plan in the light of the child/young person's progress or changed circumstances
- Be used for the conversion of a Statement of SEN to an EHC plan in line with agreed local authority timescales (attached).

During the year the educational setting will monitor progress towards objectives/outcomes specified in the Statement of SEN/ EHC Plan. Smaller steps helping to achieve the objectives/outcomes will be regularly monitored. The frequency of these reviews will be agreed for individual children/young people and will depend on their individual circumstances.

Review process

1. Before the meeting:

The child/young person's educational setting is responsible for:

- Organising and coordinating the meeting
- Inviting attendees
- Obtaining and sending out reports and any other written contributions; these should include child/young person views, parental contributions, educational setting report and any other reports from professionals involved in supporting the child/young person.

The child /young person must give the opportunity to express their views and aspirations first. Their views should be presented either by themselves during the meeting or if they do not wish to, or cannot attend the meeting, by another person. The child/young person should have completed Appendix A. They should be supported by their parents or by the educational setting to complete this.

This should be attached to the final report when submitted.

Parents/ carers should be encouraged to add their comments to Appendix A or write their own contribution which will express their views. This should also be attached to the final report.

Attendees to be invited to the annual review meeting:

- The child/young person
- The child's parents/ carers (if the child is looked after by the local authority the child's social worker and the residential care worker or foster parents should be invited, as appropriate)

- A relevant teacher, who may be the child’s class teacher or form/year tutor, the SENCO, or some other person responsible for the provision of education for the child
- A representative from the local authority (please contact your school EHC Coordinator regarding local authority attendance)
- A social worker, if involved directly in the child/young person’s Statement/EHC plan
- A health representative as appropriate
- Any other person who the child/young person, the parent, educational setting or the local authority consider appropriate.

2. The Annual review meeting

Person Centred Planning practice recommends that the voice of the child/young person should be considered first in the meeting. Other aspects of the meeting can then be discussed with the context of the child’s wishes.

All present at the meeting, especially child/young person and the parents/ carers should be given opportunities to express their views about all aspects of the review.

The Annual Report should be completed by the educational setting representative and e mailed to annualreview@lbbd.gov.uk within 1 week of the review meeting.

3. After the review meeting

The Annual Review report should be completed by the educational setting and all supporting paperwork and reports attached.

Report should be fully completed, signed and dated

For all young people in year 9 and above the Annual Review report must contain information about preparing for adulthood and a Transition plan must be completed and attached to the review..

The same process applies to children or young people who do not attend an educational setting. The responsibilities of the setting become the responsibility of the local authority and the EHC Team will take on the role of initiating and chairing such reviews.

Summary of the Annual Review timeline

Activity	Timeline
Reports circulated before the AR meeting	2 weeks before the meeting date
Meeting invitations circulated	2 weeks before the meeting
Annual Review meeting	Arranged within the 10 th month of the date of issue of a Statement of SEN or EHC Plan or previous review
Annual Review report and all supporting paperwork submitted to local authority annualreview@lbbd.gov.uk	1 week after the meeting date
Parents/carers informed about local authority decision	4 weeks after the date of the AR meeting
If any amendments agreed, amendment notice issued	4 weeks after the review meeting Parents/carers have 15 days to respond
Final amendments agreed, final amended Statement/EHC plan issued	8 weeks from the amendment notice

Types of Reviews

Type of Statement/EHC Plan	Comments/timescales
Early years statements/EHC plan reviews age 0-5.	Review should take place every 3-6 months as appropriate.
Transfers between phases of education; Early years - primary Infant – junior Primary - secondary	Final statement/EHC plan must be issued by 15 th February in the calendar year of the transfer between schools.
Transfer from secondary to post 16 institution/apprentice	<p>Final Statement/EHC plan or amended Statement/EHC plan must be issued by 31st March in the calendar year of the transfer.</p> <p>In some cases, young people may not meet the entry requirements for their chosen course or change their minds about what they want to do after 31st March. Where this is the case the Local Authority should review the Statement/EHC plan with the young person as soon as possible to ensure that alternative options are agreed.</p> <p>For placements starting September 2015 the transition process must be completed by 31st May 2015.</p>

Statement of Special Educational Need/Educational Health Care Plan

Annual Review Meeting Report Summary

Child/Young person name:		
Date of birth:		
Year Group:		
Is child/young person placed in their correct chronological year group?	Yes	No
Date of the last review:		
Date of this year's review:		
Key stage transfer review:	Yes	No
Transition review (year 9):	Yes	No
Summary of recommendation – delete as appropriate		
Maintain Statement/EHC plan:	Yes	No
Amend Statement/EHC plan:	Yes	No
Amend placement (section 4/part I):	Yes	No
Cease Statement/EHC plan:	Yes	No
Year 9+ transition to adulthood options discussed:	Yes	No
Transition Plan completed and attached	Yes	No

Child/young person's details

First Name:	
Surname:	
Date of birth:	
Address:	
Telephone number:	
Mobile:	
Email:	

Parent/Carer (1) details

First Name:		
Surname:		
Address:		
Telephone number:		
Mobile:		
Email:		
Relationship to child/young person:		
Parental Responsibility:	Yes	No
Parents first language:		
Is an interpreter required for the meeting?	Yes	No

Parent/Carer (2) details

First Name:	
Surname:	
Address:	

Telephone number:		
Mobile:		
Email:		
Relationship to child/young person:		
Parental Responsibility:	Yes	No
Parents first language:		
Is an interpreter required for the meeting?	Yes	No

Any other adults with responsibility for the child/young person?

Those invited to Annual Review: e.g child/young person, parent/carer, headteacher/SENCO, class teacher, social worker, health professional, EHC team member.

Name	Role	Invited to review meeting?	Attended review meeting	Provided written advice (please attach)

Summary of Annual Review discussion

Please summarise pupils and parents views first

Report for Annual Review of Statement or EHC Plan

Educational setting report

Main Areas of SEN – please number in order of importance											
Cognition and learning				Communication and interaction		Sensory and/or physical needs				Social, emotional and mental health	Other
MLD	SLD	PMLD	SpLD	SLCN	ASC	VI	HI	MSI	PD		

Please delete as appropriate

Medical needs	Yes	No
Uses British Sign Language	Yes	No
Uses alternative or augmentative communication e.g Signalong, PECS, Switches, Makaton	Yes	No
Autistic Spectrum Condition diagnosed	Yes	No
Requires regular 1:1	Yes	No
Requires manual handling	Yes	No
Requires alternative methods of recording	Yes	No

Please indicate what age band the child is working at in each of the areas of learning. (If Special School please use your relevant assessment data for each phase of education).

EYFS/Special School

	Nursery 1/Pre-school	Nursery 2	Reception
Communication and Language			
Physical development			
Personal, Social and Emotional Development			

Literacy			
Mathematics			
Understanding the world			
Expressive, arts and design			

Please comment on the characteristics of effective learning

Playing and exploring-engagement	
Active learning-motivation	
Creating and thinking critically-thinking	

Primary/Special School

Please describe how much progress the child/young person has made since the last review in the areas indicated below.

	Current year group Yr
Speaking and Listening	
Reading	
Writing	
Maths	

Secondary/Special School

Please describe how much progress the child/young person has made since the last review in the areas indicated below.

	Current year group Yr
Speaking and Listening	
Reading	
Writing	
Maths	

Analysis of academic progress

Please comment on progress over the key stage (if applicable) and over the last 12 months with reference to DfE National Expectations of progress and the DfE Progression Guidance.

Analysis of other progress including social, emotional and physical.

Child/young person's attendance at their educational setting since the last review.....%

Summary of additional provision put in place this year – 20 __/ __							
School resources used				£			
Top up funding/Dowry funding				£			
Current objectives/outcomes	Met Yes/No	Effectiveness Please give reasons for success or lack of success	Who delivered this? E.g teacher, SENCO, TA etc	How often?	How long was this for?	Group size	Total cost

New objectives/outcomes set – to be reviewed at the next meeting.

New objective/outcome	Who will deliver this?	How frequently?	Total cost

Is a Statement/EHC plan still required?	Yes	No
Is it necessary to transfer this statement to an EHC plan?	Yes	No
Give reasons		
Is the provision and placement still appropriate to meet the child/young person needs?	Yes	No
If not, give reasons		

Support with Travel

In line with the home to school travel policy support with travel arrangements should be reviewed annually. Travel options should be discussed at the review.

Does child/young person receive support with travel?	Yes	No
Is this exception to the home to school travel policy?	Yes	No
Have there been any changes to circumstances that impact on travel arrangements or eligibility since support with travel was last reviewed?	Yes	No
If yes, please provide further details and supporting evidence.		
Are there any alternative support with travel arrangements that could be made e.g. independent travel.		

This report should be signed by the headteacher/manager/principal of the pupil's school/unit/nursery or college and must be returned within 1 week of the Annual Review meeting date. This form must be sent electronically with;

- a copy of all the written advice received (e.g child/young person, parent/carer or other agency reports)
- any other relevant school information
- a copy transition plan for young people in Year 9 and above.

This form must be circulated to the child/young person parents/carers and the young person and anyone that contributed to the meeting in writing or in person.

Name:	
Date:	
Signature:	
Position:	

For EHC Team use only:

Date Annual review received:	
Date Logged on Tribal Database:	
Date Annual review considered:	
Date Annual review responded to by LA:	
LA Timescale met for response ie 4 weeks from date of Annual review If no then reason:	Yes / No
Name of EHC Officer:	
Signature:	Date: