

Annual Review of an Education, Health and Care plan – Guidance for settings and professionals

This document has been developed drawing on the following documents:

- The Children and Families Act 2014.
- The special educational needs and disability regulations 2014, specifically regulations 18 to 21.
- The Special educational needs and disability code of practice: 0 to 25 years, Department of Education and Department of Health, January 2015, paragraphs 9.166 to 9.185.

SEND Code of Practice -2015: 9.173

*As part of the review, the local authority and the school, further education college or Section 41 approved institution attended by the child or young person **must** co-operate to ensure a review meeting takes place.*

Introduction

The Annual Review of an Education Health and Care plan (EHCP) is not only a meeting but a process by which the outcomes set out in the EHCP and the effectiveness of provision are reviewed alongside all other sections of the EHCP. The child or young person is at the centre of this process and is involved in the discussions and decisions along with parents and professionals. At each Annual Review, progress towards achieving the outcomes and longer-term aspirations in the EHCP are discussed and recorded and consideration is made as to whether supporting targets remain appropriate.

EHCPs must be reviewed and the process completed by the local authority (LA) as a minimum within every 12 months. For pre-schoolers (children under the age of 5) with EHCPs, this review must be within 6 months. Reviews must focus on the child or young person's progress towards achieving the outcomes specified in the EHCP and must also consider whether these outcomes remain relevant.

Settings are asked to use the standard pro-forma prepared by Birmingham City Council to document the meeting- the **Record of Annual Review**.

The purpose of the annual review

- a. The principal purpose of the annual review is to:
 - i. Review the child or young person's (CYP) progress toward meeting the outcomes in the EHCP and the targets set at the previous review.

- ii. Review progress on outcomes in all relevant categories. Education, health and social care - should be reviewed.
 - iii. Check that basic information on the CYP and family (e.g. home address, telephone number etc) are all up to date and complete
 - iv. Identify and celebrate progress
 - v. Plan the following year's short-term targets and support strategies
 - vi. Evaluate the continued effectiveness and relevance of the provision set out in the EHC Plan, and consider if it is necessary to request amendment, re-assessment or cessation of the EHC Plan.
 - vii. Give families and the CYP the opportunity to request a Personal Budget, and review any Personal Budgets already in place
 - viii. Promote the preparing for adulthood (PfA) aspects of planning, especially from Y9 onwards
- b. The annual review must take account of the views of the CYP, and those of his or her parents or carers. A person-centred approach should be taken (See appendices for further information)
 - c. Annual reviews include a meeting of relevant persons, usually held in the education setting attended. A report of the meeting, with accompanying documents, is then sent to the local authority within 2 weeks of the meeting.
 - d. The SENAR team considers whether amendments to the EHCP are required, whether there is no change to the EHCP or whether the EHCP needs to be ceased.
 - e. The review is completed only when the SENAR team has received the Review paperwork and made its decision as to whether to maintain, amend or cease the EHCP.
 - f. Where a CYP does not attend an educational setting, the LA will conduct the review at a mutually convenient location.

What the SEND Code of Practice (2015) says:

- Reviews must be held in partnership with the child/young person and their parent and must take account of their wishes and feelings. This should be clearly recorded on the Record of Annual Review document.
- At each Annual Review, explore if the family or young person are requesting a personal budget to support any needs or outcomes identified in the plan (see Personal Budget Guidance)
- There is a requirement for all Education, Health and Care Plans (EHCP) to be reviewed by the Local Authority (LA) at least within 12 months. This is usually referred to as the Annual Review. However, Early Years EHCPs should be reviewed within 6 months.
- The Annual Review process must be completed on or before the anniversary of when the EHCP was first issued or the anniversary of the last review.
- The Annual Review meeting must enable full involvement of the parent, child or young person and consider their views wishes and feelings especially when making decisions.
- Reviews must focus on the child or young person's progress towards achieving the outcomes specified in the EHCP. The review must also consider whether these outcomes and supporting targets remain appropriate.
- All reviews from year 9 onward must include a focus on Preparing for Adulthood as a statutory requirement.
- The review should consider the continuing appropriateness of the EHCP and whether changes are required including whether the EHCP is still required
- New interim targets should be set for the coming year and new outcomes agreed where appropriate

Sections of the EHCP:

EHCP are not expected to be amended on a frequent basis. Amendments would be necessary if there has been a significant change in the child or young person's needs which impacts the provision they require as evidenced by updated, triangulated, professional evidence.

The Annual Review is required to check all sections of the EHCP.

Section A

Aspirations should be checked to see if they remain the same. There may be additional aspirations to be included perhaps due to new experiences, interests or circumstances.

Section B

New needs may have emerged, or existing needs changed and/or are having an impact on other areas of their life (in or out of school). The parent or CYP may not feel their needs are described accurately or to be a true representation of who they are. Some content may be dated and require amending (such as previously recorded academic levels).

Section C

There may be a new diagnosis or on-going investigations. Health conditions and resulting needs included may have changed. Any new Health advice covering health needs should be considered and where appropriate incorporated.

Section D

A change of circumstances may have occurred or a more up to date assessment may now have been completed, describing Social Care needs that should be included. The parent/carer/young person may have requested an assessment of their Social Care needs since the last EHCP was issued or in the context of the Review which should be considered in the amending of the EHCP.

Section E

Outcomes are not annual targets – they are set looking forward to the end of the key stage or beyond - but they still need to be reviewed to check they are still relevant, made more specific and measurable or may have changed. Outcomes must be specific, measurable, achievable, realistic and time bound (SMART). It may help in writing and proposing these in the Review meeting, to imagine future Reviews and how measurable the outcome will be, in later considering whether the outcome has been achieved.

If the Review established that a child/young person has achieved their education and training-based outcomes or that support can now be met within delegated resources, a discussion with the child/young person/family should take place and consideration made by the LA as to whether to cease the EHCP.

Wording to be included within the sections around timescales is as follows:

The first review **must** be held within 12 months of the date when the EHC plan was issued, and then within 12 months of any previous review, and the local authority's decision following the review meeting **must** be notified to the child's parent or the young person within four weeks of the review meeting (**and within 12 months of the date of issue of the EHC plan or previous review**).

Section F

There should be provision to match each need included in Section B. Special educational provision is defined in [s21 of the C&F Act 2014](#) thus:

- For children under two, it is any form of educational provision
- For children over two, it is education or training that anything that is different, or additional, to that normally available in a mainstream setting.

Provision must be detailed and specific and normally quantified in terms of the type, hours and frequency of support and level of expertise and clarity as to whether the support is provided through a personal budget.

Section G

Any provision included in G requires agreement from the LA and the Clinical Commissioning Group (CCG). Any health provision, such as Speech and Language Therapy, that can be considered to 'educate or train' must rather be included in Section F.

Sections H1 & 2

Any provision included here will depend on what Social Care needs, if any, have been included in Section D. It must be reviewed and may have already changed since it was originally included.

Section I

School placement. The parent/young person may want to ask for a different school or type of school if they believe it will provide a better match to their child's/their needs. Schools should not propose a change of educational setting.

Section J

Any Personal Budget (PB) already in place should be reviewed particularly where provision has been amended. This is also an opportunity to request a PB if the parent/YP would like one.

Timeframes and Responsibilities

- The Annual Review **process** is more than just a review meeting, it is a process that **must** be completed on or before the anniversary of when the EHCP was first issued or the anniversary of the last review meeting (not 12 months from the date the amended EHC plan is issued).
- The Local Authority will provide a list of children and young people requiring an Annual Review in the forthcoming full term to all Headteachers or Principals of the identified provision attended by them at least 2 weeks before the start of each preceding half term break (May, October and February).
- The school/setting or college provider will arrange and conduct the Annual Review meeting
- The child's parents or young person, a representative of the school/college/setting, health service (if involved), social care (if involved) and the SEND Case Officer, must be invited to the review meeting and given sufficient notice (given at least two weeks' notice of the date of the meeting).
- The school/college/setting must seek advice and information about the child or young person prior to the meeting. All reports must be circulated to all those invited **at least two weeks** prior to the meeting.
- The school/college/setting must prepare and send a report of the meeting to everyone invited **within two weeks** of the meeting, including the SEND Case Officer/SENAR Team.
- The report must set out recommendations for any amendments required to the EHCP and should reference any difference between the educational provider's recommendations and those of others attending.
- **Within four weeks** of the review meeting the SENAR Team must decide whether it proposes to keep the EHCP as it is, amend it or cease to maintain it. The child's parents/young person and the educational provider should all then be notified.
- Where an EHCP is to be amended the SENAR Team must issue the final amended EHCP as quickly as possible and **within 8 weeks** of the decision to amend letter.
- The child's parents or the young person should be informed that they may request a meeting with the local authority to discuss the proposed changes
- When sending the final amended EHC plan, the local authority must notify the child's parent or the young person of their right to appeal and the time limit for doing so, of the requirement for them to consider mediation should they wish to appeal, and the availability of information, advice and support and disagreement resolution services.

Local authority strategic approach

Attendance at Annual Review meeting

As a local area, we will prioritise specific annual reviews for attendance by SEND Case Officers. These include:

- Where a child or young person has been released from custody. This will include reviewing whether the EHCP still reflects needs accurately and should involve the youth offending team in agreeing appropriate support and opportunities.
- Where there is considerable concern regarding the CYPs progress or access to learning
- Placements are considered to be vulnerable as a result of complex and/or significant needs
- There has been a significant change in need as evidenced by updated, triangulated, professional evidence
- Where a pupil has recently moved into the local area.

Monitoring and review of statutory processes

All statutory processes and adherence to statutory responsibilities will be kept under continual monitoring and review by the local authority . Key performance indicators will be at the centre of this. In addition, the SENAR team will:

- Keep under review how compliance in relation to time frames for Annual Reviews of EHCPs is monitored and audited through annual audits of process.
- Ensure there is clear guidance regarding exceptions
- Ensure appropriate action is taken on casework .

Timing of annual reviews

Except in particular circumstances, all education health and care plans (EHCP's) must be reviewed at least annually. This review must be completed within 12 months of the previous review. The dates of the meeting and any other actions must allow the local authority to complete its part of the review by the 12-month deadline.

Where a child is under 5, reviews should be undertaken at least every three to six months to ensure that the provision continues to be appropriate.

Phase Transfers

Conversations about key transitions should be ongoing and not limited to the review prior to phase transfer. However, to ensure that the LA has the necessary information in sufficient time, all phase transfer annual reviews should be held no later than the first half of the Autumn term in the academic year of transition.

The phase transfers are:

- early years provider to school
- infant school to junior school
- primary school to middle school
- primary school to secondary school, and
- middle school to secondary school
- year 11 or above to a new setting or provider

(For more information, please refer to the SEND Code of Practice 9.179)

(These key transfers require Review meetings in NCY -1, 1 (infant schools only), 5 and students in Years 11 and above intending to transfer to a new setting or training provider).

For the above cohorts, the summer term of the previous academic year before the year of transition are as follows:

- Y -2 in pre-school (children under the age of 5)
- Y1 in infant school
- Y5 in primary school
- Y10 in secondary school

This allows the LA to name the next setting by the statutory deadline of 15th February for school age phased transfer and 31st March for post 16 movers on in the year of transfer.

Post 16 Transitions

For young people moving between post-16 institutions, the review process should normally be completed by 31 March where a young person is expected to transfer to a new institution in the new academic year. However, transfers between post-16 institutions may take place at different times of the year and the review process should take account of this. In all cases, where it is proposed that a young person is to transfer between one post-16 institution and another within the following 12 months, the local authority must review and amend, where necessary, the young person's EHC plan at least five months before the transfer takes place.

Preparing for adulthood (PfA)

From Year 9 onwards, the local authority has a duty to ensure that the annual review meeting "*consider[s] what provision is required to assist the child or young person in preparation for adulthood and independent living*" (Regulation 20(6) and Regulation 21(6) of the SEN and Disability Regulations 2014). This must also include preparation for the further education sector, work-based training, higher education and adult life.

The young person must be placed at the centre of such planning; the review must be driven by the young person's outcomes, ambitions and aspirations to ensure a true 'person centred' transition into adulthood.

Annual reviews are an opportunity for the child or young person to discuss with their family, school or college, and the local authority what they would like to achieve as they grow up. The aim of this is for young people with SEN to be supported towards greater independence and employability.

It's also important to remember that schools and colleges have duties to participate in the planning process for Year 9 onwards. Paragraph 8.24 of the Code says:

*"If it is clear that a young person wants to attend a different school (sixth form) or a college, then that school or college **must** co-operate, so that it can help to shape the EHC plan, help to define the outcomes for that young person and start developing a post-16 study programme tailored to their needs."*

What is preparation for adulthood?

The Code has some useful examples of what this might be (see paragraph 8.10):

- support to prepare for higher education and/or employment.
- training options such as supported internships, apprenticeships and traineeships.
- support in finding a job, and learning how to do a job (for example, through work experience opportunities or the use of job coaches);
- help in understanding any welfare benefits that might be available when in work.
- preparation for independent living including where the child or young person wants to live in the future, who they want to live with and what support they will need.
- considering local housing options including housing benefits and social care support available.
- support in maintaining good health in adult life.

- support in participating in society: this is a wide-reaching concept and includes such things as understanding how to get about (using transport and benefits options relating to this) and making and maintaining relationships.

Start planning early

The [SEN and Disability Code of Practice](#) has the detail of what ought to be considered in annual reviews from Year 9 onwards.

For teenagers, preparation for adult life needs to be an explicit element of their planning and support. Discussions about their future should focus on what they want to achieve and the best way to support them to achieve (paragraph 8.7 CoP). Arrangements must be made for the young person to receive careers and employment guidance and advice.

There may be very good reasons to start planning for adulthood sooner than Year 9 and the Code suggests that it can be helpful for EHCP reviews before Year 9 to have this focus too.

Person-centered planning

Planning **must** be centered around the individual and explore the child or young person’s aspirations and abilities, what they want to be able to do when they leave post-16 education or training and the support, they need to achieve their ambition.

Children and young people must have the support they need (for example, they might need an advocate) to participate fully in this planning and make decisions. Transition planning **must** be built into the revised EHCP and should result in clear outcomes being agreed that are ambitious and stretching and which will prepare young people for adulthood (paragraph 8.9 CoP).

It is important the child or young person themselves can give their views and cover the topics they think are important. Some helpful resources to assist with this are:

- The Council for Disabled Children [guide to help young people prepare for annual reviews](#)
- Preparing for Adulthood's [Preparing For Adulthood Guides and Toolkits](#) (councilfordisabledchildren.org.uk) or key topics to cover at annual reviews for children and young people from year 9 onwards.

There are some key points for annual reviews and transition between school and further education and/or training:

- planning depends entirely on the young person’s aspirations and abilities and what is needed to support them to “*achieve their ambition*”: the EHC P must fit the individual young person and not the other way around.
- young people should be appropriately supported to participate and make decisions. Parents and carers need to think about how best to enable their young people to make decisions when the time comes.
- transition planning must be built in to the revised EHCP.
- the outcomes sought for a young person must be “ambitious” and “stretching” and “prepare young people for adulthood”. This is very important when thinking about education or training for young people aged 19-25 where provision tends to be more bespoke (and harder to get).

What if the young person is not in education or training?

If a young person has an EHCP and is aged under 18 but is not receiving education and training (for whatever reason), the local authority **must** review the plan “to ensure that the young person continues to receive education or training” (see SEN Reg 29).

The following requirements apply to review meetings where a child or young person does not attend a school or other institution:

The child’s parent or the young person, a local authority SEN officer, a health service representative and a local authority social care representative must be invited and given at least two weeks’ notice of the date of the meeting. Other individuals relevant to the review should also be invited, including youth offending teams and job coaches where relevant, and any other person whose attendance the local authority considers appropriate

The local authority must seek advice and information about the child or young person prior to the meeting from all parties invited and send any advice and information gathered to all those invited at least two weeks before the meeting

- The meeting must focus on the child or young person’s progress towards achieving the outcomes specified in the EHC plan, and on what changes might need to be made to the support provided to help them achieve those outcomes, or whether changes are needed to the outcomes themselves. Children, parents and young people should be supported to engage fully in the review meeting
- The local authority must prepare and send a report of the meeting to everyone invited within two weeks of the meeting. The report must set out recommendations on any amendments required to the EHC plan, and should refer to any difference between the local authority’s recommendations, and those of others attending the meeting. Within four weeks of the review meeting, the local authority must decide whether it proposes to keep the plan as it is, amend the plan, or cease to maintain the plan, and notify the child’s parent or the young person
- If the plan needs to be amended, the local authority should start the process of amendment without delay (see paragraph 9.193 onwards)
- If the local authority decides not to amend the plan or decides to cease to maintain it, they must notify the child’s parent or young person of their right to appeal that decision and the time limit for doing so, of the requirement for them to consider mediation should they wish to appeal, and the availability of information, advice and support, and disagreement resolution services

Preparation for the review meeting

The setting should set the date and time for each review meeting.

The Regulations require that at least two weeks’ notice must be given of the date of the meeting; in practice, longer notice is required to allow time for the appropriate documentation to be collected and circulated. However, to secure attendance by health and social care colleagues, a longer notice period would be advisable. In cases where a CYP has an existing EHCP with no therapy provision, but a new therapy need has been identified, requests for advice should be discussed through school advice clinics initially. Where referral is indicated the therapist will supply a referral form to request advice for the annual review and this should be submitted to the service 8 weeks prior to the date of the Annual Review meeting accompanied by all relevant documents to demonstrate use of Ordinarily Available Provision.

The following people must be invited to the review meeting:

- The parents/carers. If the CYP is looked after by the LA, the residential care worker or foster parents and the child’s social worker, as appropriate.
- The child or young person. It is good practice to involve the CYP in their annual review; consideration should be given as to whether they will require support in the meeting and/or it may be appropriate for them to be present for all or a part of the meeting.
- The Headteacher or principal responsible for overseeing the provision of education for the child in question; in practice, they may delegate such attendance to a nominee, usually the Special Educational Needs Co-ordinator (SENCo).
- A representative of the SENAR Team of the LA, usually the SEND Case Officer

- A relevant health care professional in line with the child's health care need(s), for example a paediatrician, CAMHS, GP, school nurse or health visitor, to provide advice about the child's health care provision, as required.
- Social care professional(s), as required:
 - In addition, consideration should be given to inviting the following persons, as appropriate. Those professionals should be invited if they have already been involved following previous concerns raised/issues. The annual review meeting is not the mechanism to engage the involvement of professionals, and this should be done before the annual review meeting is scheduled:
 - An Educational Psychologist (EP), if a significant change in needs has become evident. A person working with the CYP, as a direct result of the EHCP.
 - Where the CYP has a sensory impairment, a specialist teacher from the integrated SEND service.
 - Where the CYP has communication and interaction needs, a specialist teacher from the integrated SEND service.
 - Where the CYP is placed in the setting by another LA, a representative of that LA.
 - Where a parent has privately commissioned a report from one or more specialists, those persons, but after consultation with the parent, and with the parent meeting any associated expenses with attendance at the meeting.
 - Any other person the headteacher or principal or LA considers appropriate.
 - Any other person suggested by the parents/carers as having involvement with the education, health care or social care of the CYP.
 - Virtual school lead if the CYP is looked after or previously looked after.

It is unlikely that all the relevant professionals will be able to attend all review meetings. It is helpful, when inviting professionals from outside the setting, to indicate the importance attached to their attendance and why they are being invited to this meeting.

Settings are asked to stress that **written advice is required** from persons invited but unable to attend the meeting. If the attendance of a particular person is thought essential, then that person should be consulted before fixing the date of the meeting.

In preparing for the meeting, the headteacher or principal should request written advice from the CYP, the parent(s) and/or carer(s), those persons specified by the authority and from anyone else considered appropriate by the setting.

Advice from the CYP's parent(s) or carer(s) must be sought. The setting must offer assistance should it be required.

On receipt of advice from all quarters, the setting is then asked to complete the annual review report document, and to send it together with all the advice received to all invited to attend the review meeting. This should be done at least two weeks before the date of the meeting.

For looked after children (LAC), the review of the personal education plans (PEP) should be integrated into the annual review.

Settings must inform the child, young person, parents and/or carers that they may bring an adviser, friend, relative or an independent parental supporter to the review meeting.

Interpretation and translation facilities should be arranged if required.

The review meeting

The Children and Families Act 2014 stresses the importance of close relationships between the CYP, their parents or carers, and the institutions which educate those CYP. Birmingham City Council holds the view that the annual review in particular provides a valuable opportunity to involve the CYP, parents and carers in celebrating progress and identifying targets for the following year.

The work of the setting to prepare the CYP and parents/carers for the review meeting, and to welcome and support their participation, is significant. The LA asks that wherever possible, a consensual view of the CYP progress, and how their strengths and weaknesses will be addressed in the next year, be taken.

Settings will be especially sensitive to the potentially stressful nature of the review for some parents/carers and CYP. The LA asks settings to be generous in offering their assistance to those CYP and parents/carers who are in need of encouragement and support. The LA also asks settings alert them, where helpful, to the assistance provided by Birmingham City Council SEND Information Advice and Support Service (SENDIASS).

Requesting an early Annual Review

If the educational setting, family or young person believe it is required, an early Review can be requested. Reasons for this may be concern that the CYP is not making progress towards their long-term outcomes; or that there has been a significant change in needs or provision. There should be professional evidence to highlight what actions have already been taken to address poor progress, including updated professional advice and guidance that has been acted on and evaluated for impact. The request will then be considered by the SENAR Team, based on the written evidence provided.

Requesting a Reassessment

An Annual Review can be an opportunity to request a re-assessment of a CYP. However, a LA can refuse a request for a re-assessment if less than 6 months have passed since the last EHC needs assessment was conducted, or it thinks that a further EHC needs assessment is not necessary for example because it considers that the child or young person's needs have not changed significantly.

At the meeting

The Headteacher, principal, or member of staff to whom responsibility has been delegated, should normally chair the meeting. Ensure that you have an agenda and allow for time to respond to queries within the time set for the meeting.

See appendix 1 for an example agenda

Review Meeting format

Although the annual review process is laid out in the Children and Families Act and the Code of Practice, the actual format of the meeting will differ from setting to setting but should cover the principles of a person-centred review.

How to consider amendments

EHCPS are not expected to require frequent changes and updates (CoP 9.193). When they do need amending, there should be supporting evidence to inform any changes.

Year Group changes

It is expected that the CYP will remain within the year group appropriate for their chronological age.

If there are compelling reasons why a CYP should remain in the same year group for a second year, then reasons should be set out for this. Settings are asked to carefully consider the implications of such a recommendation, particularly with reference to phase transfer, where a receiving setting cannot be compelled to observe a previous decision to move a CYP into a different year group.

It is hard to envisage a situation where a CYP can be 'held back' for more than one year. The LA will consider any offset request as per the offset process.

Following the review meeting

The setting is required to prepare a report of the meeting- the Record of Annual Review. Some of the content of this report is likely to have been in the pre annual documentation circulated pre-meeting.

However, it should also make recommendations upon the matters mentioned above, giving sufficient detail for the LA to consider whether amendments to the EHCP are necessary.

This report must be sent to all who attended the review meeting and to the LA within two weeks of the meeting. Settings are also asked to bear in mind the time needed for the LA to consider the report and take action upon it within the 4-week deadline.

On receipt of the report, following the meeting, the LA is required to consider whether to continue the EHCP in its current form, amend it, or cease to maintain it.

Further considerations

Electively home educated CYP

The CoP states that, where parents/carers educate at home, the LA is not under a duty to make the provision set out in the EHCP, but it still must review annually to assure itself that the provision set out in it continues to be appropriate and that the CYP's SEND requirements continue to be met. (10.32).

SEND Case Officers should arrange to review the EHCP of electively home educated CYP at least annually. Flexible arrangements for the meeting may be required, depending on each individual circumstance.

Home to School Transport Provision Review

Where a family/carer receives a Personal Transport Budget (PTB) it should be considered if it is having a positive effect on the child/young person and flagged if further support or a review is required. There may be occasions where a PTB is not an appropriate way to provide transport assistance.

Appendices

Model agenda for an Annual Review meeting

1	Welcome, introductions and purpose <ul style="list-style-type: none"> Record attendees, non-attendance and reports submitted on the Record of Annual Review form Ensure that everyone has access to all of the papers 	Chair	5 mins
2	The child or young person's voice <ul style="list-style-type: none"> Highlight achievements and successes Identify aspirations 	All	10 mins
3.	The parent or carer's views <ul style="list-style-type: none"> Highlight achievements and successes Confirm aspirations Identify things that need to improve or change 	Parent/Carer	10 mins
3	Review progress <ul style="list-style-type: none"> Review progress towards achieving outcomes in Section E Review that current outcomes remain appropriate or if required agree new ones Review short term targets and set new ones Review special educational provision in Section F and the arrangement of delivery to ensure that it is still appropriate <i>and</i> is enabling good progress Review health and social care provision and check the effectiveness towards achieving the outcomes Check if aspirations (both child/young person and parent/carer) have changed Check if the parent/carer or young person would like to request a Personal Budget 	All	45 mins
4	Other information <ul style="list-style-type: none"> Ensure that personal information is accurate and up to date Note any changes in the child or young person's needs in Section B Does the plan need amendment? Is the plan still required? All reviews from year 9 must include a focus on preparing for adulthood (statutory) 	All	15 mins
8	Summarise <ul style="list-style-type: none"> Key actions Any areas of disagreement 	Chair	5 mins
9	Conclusion <ul style="list-style-type: none"> Give out evaluation forms Confirmation of timescales for remaining processes Thanks 	Chair	5 mins

Annual Review Actions (AR) Actions checklist

	Action to be taken	Action date	Date of action
8 weeks prior to the AR meeting	If you have significant concerns about a child or young person please discuss these with your SEND Case Officer at this point.		
	Write to the parents/young person inviting them to the meeting.		
6 weeks prior to the AR meeting	As soon as the meeting is confirmed, send your SEND Case Officer notification of the meeting date and time, highlighting if and why their attendance is requested.		
	Invite all relevant people to provide updated reports and attend the meeting.		
	Support the child or young person to think about and record his/her views and wishes.		
4 weeks prior	Prepare the school/setting report for the annual review.		
3 weeks prior to the AR meeting	The parent, child/young person returns a record of their views		
	Practitioners return updated reports and confirm whether they are attending		
	Collate updated reports, the parent and child or young person's views and send to all those attending the meeting		
1 week prior to the AR meeting	Ensure that the child or young person knows that it is his/her meeting. Give them choices where possible (seating arrangements, refreshments, music). Check how he/she wishes to contribute.		
	Agree chairing and recording roles.		
	Prepare what to say and take any information required to the meeting. Be clear what is important for the child/ young person.		
	Check the support the family wants (if any)		
See the AR meeting agenda attached for how to structure the meeting			
Within 2 weeks of meeting	Send a complete record of the meeting to the relevant SEND Case Officer/Team e-mail address along with an annotated copy of the EHCP with any changes proposed and any other supporting other paperwork listed on the meeting record form.		
Within 4 weeks of meeting	Your SEND Case Officer will write the child's parents or young person to inform them as to whether the Local Authority proposes to keep the plan as it is, amend it or cease to maintain it.		

Person centred planning

What does a Person centred review look like?

A Person-Centred Review (PCR) is a meeting that makes sure the child or young person are involved and are at the centre of the process. PCRs focus on what is important to them now and in the future, and how best to support them.

What does a Person-Centred Review (PCR) do?

PCRs make sure that the child or young person are central to any decisions that are made. They can make sure people are living the life they want for themselves and acknowledge what is working well. PCRs also encourage everyone to think about what is not working and identify what needs to be changed. They set next steps and actions needed to achieve them. PCRs are focused on outcomes and gather great information about the person that can be shared.

What does a Person-Centred Review look like?

A PCR usually takes place in the person's school or college. A room is set up informally and there may be music and refreshments, chosen by the person. These things welcome everyone into a warm, friendly atmosphere and make people feel relaxed and valued. There are also posters on the wall that ask the following questions:

Who's here? - This gives us a record of who was at the meeting. This will usually be the SENCo, parent / carer and professionals. The child or young person can also invite a friend too.

What do we appreciate about the person? – People are invited to share positive information and things they like and admire about the young person.

What's Important for the person? - This is about moving things forward and thinking about what is important, not just now but in the future as well.

Best Support – Here we think about what others need to know or do to make sure the person is supported with the things that are important to them now and in the future.

What's Working / Not Working? – This gives the young person the chance to say what is going well or not so well in their life and gives professionals and family an opportunity to give their views too.

Outcomes and Actions – Once information has been shared, the next stage is to explore differences of opinion and generate clear outcomes that take the person closer to the future that they desire. An action plan will be written to explain who needs to do what and by when. Actions are agreed to keep things that are working and to begin to change what is not working. Outcomes and Actions are all informed by what is important to the young person, to support them towards the life they want for themselves.

What happens at a Person-Centred Review?

The school or college will help prepare for the PCR. At the meeting, a facilitator will get everyone to introduce themselves and say what they like and admire about the child or young person. After that people will be asked to record their views on the other posters. Then we use the information we have gathered to create actions. These are informed by the things that are important to the young person now and in the future, so we can move them towards the life they want for themselves.

When might I be invited to a Person-Centred Review?

You may be invited to a PCR so that we can consider the best support for your child. This might be an Annual Review of an Education, Health and Care Plan or a SEN Support Provision Plan; to review progress; or to talk about a possible change in how your child's needs are met.

For more information watch this short video:

[The EHC plan and The Person Centred Connection \(updated 2019\) - YouTube](#)

The person-centred review meeting

