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Annual Review Process for Schools and Educational Settings in Kent

The Annual Review Process

Overview

All students with an Education Health and Care plan must have an annual review. It must take place on or before the anniversary of the issue of the EHC plan, and then subsequently within 12 months of the previous review. (Code of Practice Chapter 9 - Reviewing an EHC Plan 9.169).

The annual review meeting is normally held in the education setting and informs the Local Authority (LA). The LA is responsible for the annual review process. In Kent the annual review meeting is normally delegated to the school or setting.

The annual review meeting must be undertaken in partnership with the student and their parent(s)/carer(s) and must take account of their views, wishes and feelings, including the right to request a personal budget each year.

The annual review must focus on the young person’s progress towards achieving the outcomes specified in their plan.

The annual review must consider whether the outcomes and short steps remain appropriate.

 Kent will provide a school/setting with a list of all students and their review dates each term.

The annual review process includes the annual review meeting and concludes when the Local Authority makes the decision whether to maintain, amend or cease the EHC plan

Gathering Information for the review meeting

The school or setting will need to gather information and advice which should provide

 • Details about the student’s progress and how they are accessing teaching and learning

 • Whether the current special educational provision is effective and what impact it has had.

 • Whether the current health and social care provision is effective and how it is ensuring good progress towards outcomes.

 • A review of any direct payments including the impact.

• Progress towards the outcomes stated in the EHC plan

Where there are changes to a student’s special educational needs or provision, additional professional advice or reports should be obtained.

The Review Meeting

In the vast majority of cases, the LA delegates the review meeting to the educational setting that knows their student best. There will be exceptions, such as those students who are electively home educated or not in an educational setting.

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 and will need to be submitted to the organisers promptly.

 Information and advice from young people and professionals should inform changes and updates that may be appropriate to the EHC plan. If there is any disagreement about the changes, these must be reported to the LA with the review meeting details.

 It will be useful to make sure that there is a copy of the most recent EHC plan available for everyone at the meeting.

The review meeting needs to:

 • Consider the young person’s progress towards the outcomes detailed and consider whether they are still appropriate. Please make sure that the progress towards outcomes re recorded on the Annual review meeting form. It is very important to know whether at the end of a key stage the outcomes have been

Exceeded

Achieved

Partially Achieved

Not achieved

If the child or young person is not at end of a key stage, then please record whether they are on target to

Exceed

Achieve

Partially Achieve

Not achieve

There is space on the form specifically to record this information.

 • Consider what provision is required to help the child or young person prepare for adulthood and independent living (from the earliest years)

• Review any interim targets set by the education provider

 • Set new interim targets for the coming year, and where appropriate agree new outcomes – new outcomes should be suggested by the outside professional agencies and discussed and agreed with parents, the child or young person either prior to or in the meeting.

It is helpful to use a copy of the most recent EHC Plan and annotate it as part of the review meeting. This can be submitted with the supporting documents to the EHC team.

*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).*

Kent County Council provides a template for schools, colleges and other educational settings to use to help direct the annual review meeting and would encourage all provisions to complete this and return to the LA promptly when the meeting is concluded. This, and other information, is available on the KELSI webpages.

The meeting organiser must prepare and send a report of the meeting to everyone invited and the Local Authority within two weeks of the meeting. This should include all professional reports submitted.

NB **In order to meet the deadlines set out in Code of Practice for the Annual Review, the Local Authority has no more than four weeks from the date of the review meeting to make its decision whether to continue with the plan, amend the plan (usually at key stage transfers and year 9) or to cease the plan.**

Person Centred practice

Kent is committed to young people being at the centre of processes and would urge the meeting convener to consider some of the following and the ethos of person-centred practice.

How to make meetings more accessible for everyone

Here are some suggestions that would help your meetings to be more accessible, Of course everyone is different, so you will need to check with each person.

Before the meeting – pupil’s perspective

* I would like to be invited to help plan the meeting.
* Can I choose a room I am comfortable with or at least see the room beforehand?
* Will there be a difficult place to walk through to reach the meeting room?
* It would help if I can talk to my teachers beforehand about the things that are working /things I am struggling with.
* I would like to hear comments from my teachers and other practitioners during my meeting
* Please check with me about how I would like to be referred to (name, pronouns etc.).
* Ask me about what it would be hard to talk about in the meeting- check what could trigger difficult emotions or response.
* If you need to talk about something difficult, discuss it with me beforehand and ask if I would like to leave the room at that point
* Please remind me that I can ask questions
* Please reassure me that it is fine to leave when I want to, without having to ask permission.
* I may like to make biscuits or bring snacks in advance to share in the meeting
* I may chose to make invitations to invite people to me meeting

During the Meeting

* It is easier if I am in the room first, so I don’t have to walk into a room full of people.
* I like to use fidget toys , please offer these or other sensory items to distract me from the intensity of the meeting.
* Have a drink or snack at the meeting that I like. Offer drinks and snacks to everyone – I may like to offer them to others myself.
* I like to be on my phone while others are talking at a meeting. This isn’t being rude; this is to help me cope with the demand of people looking at me.
* If there are people in the meeting that I don’t know, please ask them to introduce themselves and share something of common interest e.g. for me it is to talk about pets.
* I would like to see any paperwork before the meeting.
* Please listen to each young person
* If you are unable to do something, please explain this.
* Don’t over promise.

At the End of the Meeting

* Explain what has been decided
* Explain what will happen next
* Explain what will be followed up later
* Please reassure me it was OK to share my views
* Book a time with me after the meeting to look at the notes and decisions before they are sent to other people.

Year 9 and above (Preparing for Adulthood)

 Review meetings taking place in Year 9 and above must have a particular focus on considering options and choices for the next phase of education and what options will be available when leaving a school setting.

Kent’s annual review meeting form template has a special section for Year 9 and above, but you can use it for younger pupils if you would like to.

Time scales

The Code of Practice (2015) SEND states that an annual review must take place within 12 months of the issue of the EHC plan or the last review.

 Please hold the review meeting at least 4 weeks before the anniversary of the last review or the issue of the EHC plan and submit the results of the meeting to the LA within two weeks.

Within four weeks of the review meeting, the Local Authority must decide whether to

1. Maintain the EHC plan in its current form providing families with information about their rights to mediation, disagreement services, and time scales.
2. Amend the EHC plan.

An amendment notice /draft plan must be sent to the parents/young people showing the proposed amendments and the evidence that supports it. The parents/young people must be told of their rights including requesting a particular school, give 15 days for comments or representations on the proposed changes.

The LA must issue the amended EHC plan within 8 weeks of the original amendment notice.

1. The decision to cease to maintain the plan providing families with information about their rights to mediation, disagreement services, and time scales.

None of the decisions subsequently made by the Local Authority should be a surprise to the families, as the review meeting must make clear any proposals. Any disagreement by the families, or other attendees of the review meeting must be clearly shown in the supporting documentation submitted to the LA.

Any setting that does not submit an annual review meeting on time to the LA will be reminded by their local area team. These will be classed as ‘overdue’. It is an expectation as per the Code of Practice that educational settings must co-operate with the Local Authority.

Transfer dates between phases

For transfers into or between schools for Early Years to school, KS1 to KS2, KS2 to KS3, reviews and amendments must be completed by the Local Authority by 15 February each year.

Early Years

 We ask that the child’s EHC plan is reviewed before the child is due to start their statutory education. The Code of Practice suggests that early years can hold reviews every six months.

Transfer from KS2 to KS3

 In Kent we ask that Year 5 students’ annual review meeting considers the transfer for Year 6 to Year 7 and is submitted to the LA by the end of the Year 5 to allow sufficient time for all parties to consider the choices for the future.

**A school place must be named in the plan by 15th February for phase transfer pupils up to Year 6.**

Transfer from KS4 to post 16

Reviews for students in Year 11 need to be submitted to allow enough time for all parties to consider the choices for the future.

 In Kent we ask that Year 10 students’ annual review meeting considers the transfer for students as their statutory education ends.

Where relevant these should include effective planning for young people moving from children’s services to adult care and health services. It is particularly important in these reviews to seek and to record the views, wishes and feelings of the child or young person. The Code of Practice states that the review meeting organiser should invite representatives of post-16 institutions to these meetings, particularly where the young person has expressed a desire to attend a particular institution.

An educational placement has to be named in the plan by 31st March for ‘post-16’ students

Children in the care of the Local Authority

 The Code of Practice advises that for looked after children the annual review should, if possible and appropriate, coincide with one of the reviews in their Care Plan and in particular the personal education plan (PEP) element of the Care Plan. Schools may be able to co-ordinate this with the annual review process to improve the efficiency of their reviewing timetables.

The Annual Review Process

Tick list – please use this to help manage the process

|  |  |
| --- | --- |
| Action  | Completed |
| Set annual review meetings for all students in your setting with an EHC plan |  |
| Agree date of annual review meeting with parents/ carers and formally invite |  |
| Inform LA of dates  |  |
| Send dates to all relevant professionals |  |
| Issue reports and meeting invitations at least two weeks in advance |  |
| Hold meeting |  |
| Submit the Annual Review Meeting form (with supporting evidence attached) to relevant Area SEN Team• Notes of any disagreements • Copies of supporting documents submitted for the annual review meeting. • Updated targets • Updated outcomes (if appropriate) |  |
| Send a report of the meeting to everyone invited within two weeks of the meeting |  |
| Set the date of the annual review meeting for the following year |  |
| SEND Code of Practice Jan 2015 Section 9.166 – 9.185 ( for reference) |  |
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