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Maintaining an education, health and care plan - the annual review

Overview

Education, health and care plans (EHCPs) must be reviewed every 12 months (if a child is under 5 years old, reviews must be six monthly). The purpose of the review is:

- to listen, consider the young person's views on how the year has been, discussing areas of strength and difficulty
- to bring together the views of everyone who supports the child
- to review the special educational needs and consider whether there are any changes
- to review how well the outcomes in the EHCP are being achieved and whether the long term targets remain challenging and appropriate
- to review provision and consider whether there are any changes required
- to set new targets for the next year, which the school will work towards outside of the EHCP.

EARLY YEARS SUPPORT

Support for children whose special needs are identified between birth and when they go to nursery.

SEN SUPPORT IN EDUCATION

Graduated approach to support children and young people with SEN in nursery, school or college, based on ASSESS, PLAN, DO, REVIEW cycle. Within control of the nursery, school or college.

EDUCATION, HEALTH & CARE PLAN

A plan detailing support and provision for children and young people whose needs cannot be met within SEN Support. Contains a description of needs, outcomes and provision around education, health and social care.

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Formal review of progress against targets and outcomes and chance to revisit and reassess needs, outcomes and provision.

TRANSFER

Process of transferring a Statement of Educational Needs to an EHCP. Managed through a transition review process.

Code of Practice 5.46: Where a child has an EHCP, the local authority **must** review that plan as a minimum every twelve months. As part of the review, the local authority can ask settings, and require maintained nursery schools, to convene and hold the annual review meeting on its behalf.

For children who already have an EHCP who reach Year 9 (age 14 and above) the annual review must include a discussion of the needs, provision and outcomes relating to the preparing for adulthood categories.

- Preparing for higher education or employment
- Preparing for independent living
- Support in maintaining good health
- Support in participating in society.

This may require a significant addition to, or modification of the existing EHCP.

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Similarly for children moving between key stages, (transition) or more importantly between schools (primary to secondary) the EHCP section A (all about the child and their aspiration), needs, outcomes and provision should be reviewed and if necessary redrafted to accurately reflect the situation of the child at that point in time.

It is not necessary to update all these sections at each annual review unless new or different needs have been identified, outcomes need to be changed or there is a change in provision. Ideally an EHCP will not need to be changed regularly (annual targets, which will need to be updated annually should normally be held in a school annual review document rather than in the EHCP).

Types of annual review meeting

As well as the standard annual review meeting there are some variants on the annual review – which will be described in more detail in this chapter. The variants are:

- I. annual review for a child or young person with an EHCP (or statement) – the normal situation
- II. six monthly review for children in early years settings
- III. annual review for a child who will transition to a different setting (such as from primary to secondary school). This is also known as a phase transfer. This happens normally in nursery (to Reception), Year 1 (infant to junior), Year 5 (primary to secondary), Year 10, 12, 13 or 14 (secondary to sixth form, college or other post-16 provision)
- IV. annual review for a child or young person in Year 9 or 10, which must include an extended discussion on 'Preparing for adulthood'
- V. annual review for a child with a statement who will transfer to an EHCP in the next academic year (typically children in Years 1, 4, 8 or 10) – see transfer schedule.

The annual review: Step-by-step

1. Plan the annual review meeting

The educational setting is responsible for planning the annual review meeting. Normally the SENCo will do this. They will write to the parents, the young person and professionals involved with the child or young person inviting them to attend the annual review meeting and to submit their advice in advance of the meeting. At this point they will set a date. The parent can ask that the date be moved if it is not convenient or a key professional is not able to attend. The parent and professionals must be given **at least** two weeks' notice of the date of the meeting.

2. Submit advice prior to the annual review

The parents and the child or young person will be asked to submit their report prior to the annual review. In this, they should describe how well things have been going from their perspective (what's going well, what not so well), describe any concerns they may have, and mention any additional needs that they believe have arisen or become obvious during the past year. They should also list anything that they would like to consider for the future, any aspirations or plans that will have an impact on outcomes or provision.

Professionals will also provide their advice, where relevant. They should submit these in a form that describes how well the child is progressing towards the defined outcomes and detail any changes they see in need or they believe should be made to provision. Sometimes the Educational Psychology team will submit a report following the meeting, summarising key points of discussion around needs, provision and outcomes, which will be based on the discussion at the review meeting.

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Any information and advice obtained should be circulated in advance to everyone attending the meeting.

3. The annual review meeting

Suggested agendas for the various types of Annual review meeting are provided below. In each case use of the AR1 form to guide the meeting will ensure that everything is covered and documented in a structured way. It is recommended that the relevant parts of this form be filled in prior to the meeting and distributed to all (along with any reports submitted) at the meeting. Following the meeting the discussions and actions agreed can then be recorded in the same form and then submitted with the other paperwork to the EHCP coordinator in the SEN team of AfC to append to the case file and if necessary to use to make updates to the plan or statement before it is reissued.

Wherever possible the child should attend at least part of the annual review meeting. The meeting should be person-centred to the child, which means facilitating the meeting and supporting the young person to express their views in the most appropriate way. There is a section at the end of this chapter, which describes person-centred planning in more detail. It may not be appropriate for them to attend the entire meeting, in which case the first part of the meeting should focus on hearing from the child. Young people of 16 and above must attend their own annual review meetings if able. They can elect to have an advocate present if they choose.

4. Documentation of annual review

The Code of Practice states that following the annual review meeting the school must create a written report, which sets out recommendations or amendments to be made to the EHCP, if they are significant. The report must include the advice and information received prior to the annual review. This report must be prepared within two weeks of the review meeting and must be circulated to everyone who was invited to the meeting as well as the local authority (the relevant EHCP coordinator in the SEN team at AfC).

The annual review form AR1 should be used to guide the meeting and to make sure that all key information has been documented so that there is a record of the meeting and what was agreed. Completing the form fully should mean that no additional minutes of the meeting will be required (or only in exceptional circumstances). The EHCP or statement should only need to be updated and reissued if there are significant changes to needs, outcomes or provision. A major review of the plan is required at phase transfer (primary to secondary) or in Year 9/10 to look at the preparing for adulthood categories (see below).

5. Local authority review of plan (continue, amend, cease)

The annual review process will always need to consider if an EHCP continues to be needed. An EHCP may be ceased when the education and training outcomes in the EHCP have been achieved or:

- a young person aged 16 or over takes up paid employment (including employment with training but excluding apprenticeships)
- the young person enters higher education
- a young person aged 18 or over leaves education and no longer wishes to engage in further learning
- the local authority is no longer responsible for the child or young person, for example, they have moved to another local authority area.

Once the SEN case officer receives the annual review report they will either:

- continue to maintain the plan in its current form – in which case a letter will be sent to confirm this
- amend the plan as per the recommendations in the report. A new version of the plan will be issued to everyone involved and a formal letter will be sent to the parents or young person confirming this,

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enclosing a copy of the amended EHCP and asking the parents or young person to review any changes and to respond with their comments within 15 days

- cease the plan (for the reasons outline above).

If the local authority decides to cease the plan or to amend it, it must inform the parents and/or young person of their right to appeal, the time limits for doing so and information on mediation or other disagreement resolution services.

The local authority must inform the parents of their decision within four weeks of the review meeting.

6. Issue of final plan

If the EHCP has been amended the local authority (the EHCP coordinator) must send the final version of the plan (following any requests or comments made by the parents or young person) to the parent or young person, the educational establishment and to the other involved professionals as soon as possible but at any case within eight weeks of the initial draft amended plan being sent out.

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Sample agendas for various types of annual review

Variant I and II: Annual review for a child or young person with an EHCP (or statement) or six month review for a child in an early years setting

Documentation for the meeting

- Copy of current EHCP or statement
- Copy of Form AR1 pre-populated with information if possible
- Copy of all reports submitted by professionals, including the school (if not in AR1)
- Report from child or young person and from family

Agenda for meeting

1. Discuss a summary of this year

- Hear the views of the child or young person and parent or carer
- Review reports submitted, including parent, child or young person, school and any involved professionals
- Discuss progress and highs and lows over the past year
- Discuss progress against targets and outcomes defined
- Discuss whether any of the existing outcomes (or targets in the case of a statement) need to be revised or updated
- Discuss whether needs have changed and whether provision therefore needs to be changed.
- Discuss whether this means that there may need to be a change in placement to meet the needs
- If a phase transfer is upcoming discuss possible future placements and ensure that parents understand the need to research suitable settings for the next stage (the local authority or school are not able to make a recommendation of a particular setting)
- Discuss whether the plan needs to continue to be maintained or can be ceased (if the child or young person has made so much progress that the educational setting will be able to provide suitable support without needing top-up funding)

2. Review (and update) current EHCP or statement document

(Note: changes to the EHCP or statement should be kept to a minimum – however if there are changes needed in needs, outcomes or provision then these will need to be documented and the plan or statement reissued).

- Review section B (Needs), or the equivalent section in the statement, identified in the plan and identify any changes required based on reports submitted or discussions at the meeting
- Review outcomes (Section E) and provision (Section F) and define whether any changes are required (outcomes may not be defined for children who still have a statement)
- Identify other actions agreed that will be taken as a result of the review (such as the way that support is provided, follow up meetings, further information that will be asked for)
- Review section A or overview (in statement) and identify any changes that are needed

3. Final actions

- Discuss SEN transport with the family – whether they use it, need it, continue to need it. Refer to the SEN Transport Policy on the AfC Local Offer
- Discuss short breaks: are they accessing the service, do they know where to go to access?
- For children with EHCPs: discuss personal budgets. Is the family aware of them and are they interested in getting one?
- Give out the annual review questionnaire for the child or young person to complete and return to the SEN team.

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Variant III: Annual review for a child who will transition to a different setting (such as from primary to secondary school) - also known as a phase transfer

- As for a typical annual review - but with the additional agenda item to discuss possible placements and where to go for advice (Local Offer, school open days, school SEN information reports, SENDIASS, SEND Family Voices).
- Explain the process (for secondary transfer the parents do not need to apply through the normal on-line school admission process. They will be sent a copy of the amended EHCP or statement with a letter inviting them to express their school preference (top three choices). This can include mainstream schools, special schools or independent schools (special or otherwise). For more information about selecting schools please see the chapter 4 'Determining school placement' the Golden Binder.

Variant IV: Annual review for a child or young person in Year 9 or 10, which must include an extended discussed on 'Preparing for adulthood'

CoP 7:20 "From the age of thirteen onwards, annual reviews focus on preparing for adulthood."

Documentation for the meeting

- Copy of current EHCP or statement
- Copy of annual review Form AR1 pre-populated with information if possible
- Copy of EHC-PFA additional, alternative sections B, E & F for Preparing for adulthood
- Copy of all reports submitted by professionals, including the school (if not in AR1)
- Report from child or young person and from family

Agenda for meeting

1. Discuss a summary of this year

- Hear the views of the child or young person and parent or carer
- Review of reports submitted, including parent, child or young person, school and any involved professionals
- General discussion of progress and highs and lows over the past year
- Discussion of progress against targets and outcomes defined
- Discuss whether the plan needs to continue to be maintained or can be stopped (if the child or young person has made so much progress that the educational setting will be able to provide suitable support without needing top-up funding)

2. Review preparing for adulthood categories on EHCP

If child is in years prior to year 9 this step is optional. If child is in Year 9 or 10 this step is mandatory.

- Review the preparing for adulthood (PfA) categories for the EHCP, using the additional form.
- Discuss suitable outcomes based on the PfA categories. These may be a simple copy and paste, or more probably will require rethinking some of the outcomes.
- Discuss how the needs and provision defined fit with the defined outcomes.
- Document any additional needs / provision identified through this discussion in the main EHCP document
- Discuss whether this means that there may need to be a change in placement to meet the needs

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If the child is in Year 9 decide whether the whole EHCP should be reformatted using the preparing for adulthood format or whether to simply update the existing document and append the outcomes discussed for review in Year 10 (from Year 10 it is mandatory to use the preparing for adulthood categories)

If the child is in Year 10 reformat the whole EHCP using the preparing for adulthood format for needs, outcomes and provision. All needs, outcomes and provision listed around

- Cognition and learning
- Communication and interaction
- Social, emotional and mental health
- Sensory and physical

must be reviewed and redrafted under the categories

- Further or higher education and/or Employment
- Independence and independent living
- Community and friendships
- Maintaining good Health

This is so as to ensure that the young person and their family begin to think about next steps post-16 and to ensure that the right kinds of provision are in place to start to transition to either high education or employment and ensure that the young person is being supported towards an appropriate level of independence.

- Discuss potential future placement – A levels, college, PEP, apprenticeship, post-16

3. Final actions

- Discuss SEN transport with the family – whether they use it, need it or continue to need it. Highlight that this is no longer statutory for post-16 education and training (refer to AfC SEN Transport Policy on the Local Offer)
- Discuss short breaks: are they accessing the service, do they know where to go to access?
- For children with EHCPs: discuss personal budgets. Is the family aware of them and are they interested in getting one?
- Give out the annual review questionnaire for the child or young person to complete and return to the SEN team.

Variant V – Annual review of statement preceding transfer to EHCP

During the annual review in the year before the year in which the child is scheduled to transfer from a statement to an EHCP, some additional steps should be undertaken so as to effectively prepare for the transfer to an EHCP. More information on the transfer process can be found in chapter 6 of the Golden Binder.

Documentation for the meeting

- Copy of current EHCP or Statement
- Copy of Annual Review Form AR1 pre-populated with information if possible
- Additional pre-transfer checklist, form TR1
- Copy of blank EHCP Form (either EHCP1 or EHCP2 depending on the age of the child)
- Copy of blank section A (EHC-A)
- Copy of all reports submitted by professionals, including the school (if not in AR1)
- Report from child or young person and from family

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Agenda for meeting

1. Summary of this year

- Hear the views of the child or young person and parent or carer
- Review of Reports submitted, including parent, child or young person, school and any involved professionals
- General discussion of progress and highs and lows over the past year
- Discussion of progress against targets
- Discussion of provision and how well this is meeting the needs of the child or young person.
- Document any changes needed in needs or provision in the annual review form.
- Discuss whether the current placement is meeting the child's needs or whether this needs to be changed.
- Identify other actions agreed that will be taken as a result of the review (e.g. way that support is provided / follow up meetings / further information that will be asked for)
- Discuss whether the statement needs to continue to be maintained (and therefore the transfer to EHCP review process should be triggered) or can be ceased (if the child or young person has made so much progress that the educational setting will be able to provide suitable support without needing top-up funding)

2. Review of EHCP form and identification of advice needed in preparation for transfer

- Review the appropriate EHCP form (when conducting an annual review for children in Year 9 or above the Preparing for adulthood version of the form should be used).
- Give the family or young person a copy of section A and ask them to take it away and start to review and if possible to complete so as to be as prepared as possible for the transfer review process (the school may offer to help with this process at a separate meeting)
- Discuss the possibility of using a Wiki or other format, should that be more appropriate for the child or family
- Review the needs defined in the statement and identify how these can be translated into section B in the statement. Identify any gaps.
- Discuss outcomes for the child or young person. Start to identify some preliminary outcomes and document these in section E of the EHCP form.
- Review provision as defined in the statement and identify how these can be translated into the provision (Section F) in the EHCP. Identify any gaps.
- Identify whether there is up to date (written) professional advice that supports the updates to needs or provision or whether additional advice needs to be requested
- Document which advice should be sought and who will do it (some advice can be requested by the school, some by the family and some by the AfC SEN team as part of the transfer review process)
- Discuss personal budgets. Is the family aware of them and are they interested in getting one?

3. Final actions

- Discuss SEN transport with the family – whether they use it, need it or continue to need it
- Discuss short breaks: are they accessing the service, do they know where to go to access?
- Give out the Annual review questionnaire for the child or young person to complete and return to the SEN team.

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Detailed guidance on completing the annual review form (AR1)

This section gives some guidance on how to complete the annual review form.

Section	Complete before, during or after meeting?	Guidance
General information	Before	Complete the general information so that the once the documentation is submitted the EHCP coordinator can verify that information held on record is still up to date.
Annual review meeting type	Before	Tick one of the boxes to define which type of annual review meeting will be held. This should also help guide you to which supporting documents are appropriate.
PART 2: Review attendees	After	Indicate who was invited, who attended, who submitted a report and whether it was received before the meeting (occasionally professionals such as educational psychologists submit their reports after the annual review)
PART 3: Summary of this year		
Views of school, setting, pupil and parent	Before	The form can be used to record reports from school, pupil and parent, which should be written in advance of the meeting. If they are written in a separate document, append the document to the form and use the check box to indicate this. The pupil's views can be provided in any appropriate format. It does not have to be written.
Progress this Year	Record the outcomes from the EHC before the meeting. Record agreed progress during the meeting.	<p>This section is intended to provide a summary of progress only. Details and evidence of progress should be provided through the "School's View" in section 3 of the form as well as any other reports that the school uses to record and track progress, which can be appended to the annual review document.</p> <p>During the meeting child or young person's progress against the defined outcomes should be discussed and a summary of this recorded in the table using the scale 1- 5. If the outcome is no longer relevant record this here and explain why in the 'Document revised outcome' column.</p> <p>If the outcome needs to be tweaked to continue to be relevant, you can document this in the "document revised outcomes" column – otherwise leave this blank.</p> <p>In the box 'What has contributed to the above progress ratings?' you do <u>not</u> need to rewrite evidence that is already recorded in other documents (that can be appended to the annual review form) – they should simply be referenced here. (You might want to include, for example, if progress has been poor – perhaps the child has missed a lot of school because of medical issues, or if progress has been particularly good – is it because a provision has been particularly successful?).</p> <p>Keep the text in here brief – you shouldn't need to write more</p>

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Section	Complete before, during or after meeting?	Guidance
		than a few lines.
PART 4: Changes required to plan		
Changes to aspirations or updates to 'all about me' section A	During	If any changes are needed to the child's or young person's aspirations, history or significant events, then document here
Changes to needs, provisions or outcomes	During	<p>This should have been discussed during the main part of the review, but you should record formally what changes are needed here.</p> <p>You can record in the text which category (such as cognition and learning) is relevant to that need, provision or outcome</p> <p>The information in this section will be used by the EHCP coordinator to update the EHCP or statement following the meeting. For most annual reviews it is <u>not</u> expected that a change will need to be made to these EHCP sections– so only record here significant changes to provision or outcomes that mean that the EHCP needs to be reissued. Minor changes can be recorded under "PART 5: other actions" later in the form. (this is to avoid having to reissue every EHCP every year after the annual review – which isn't necessary for minor changes).</p>
Changes in placement discussed	During	<p>If a change in placement is not discussed then record N/A in this box.</p> <p>A change in placement may need to be discussed either because:</p> <ul style="list-style-type: none"> · needs have changed and provision needs to change to such an extent that the current school or setting is no longer able to fully meet the child or young person's needs · the child is preparing for a transfer to a different school or setting because of a phase transfer (such as primary to secondary) <p>Record what was discussed in this box, including any initial thoughts on future settings or type of setting that might be appropriate. This is not a formal request for a different placement, it is simply a chance to record the discussion.</p>
PART 5: Other actions discussed at the review to	During	Document any actions agreed that do not directly impact on needs, provision or outcomes, but that have been agreed to support the child or young person more effectively in the coming year, here. This might be discussions around the way that home and school will communicate around the child, agreement to hold meetings each term, or a discussion of

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Section	Complete before, during or after meeting?	Guidance
		<p>how technology is deployed in school to support the child. This action plan should be reviewed at the next annual review to ensure that all actions were followed up on.</p> <p>There is an additional box to record any other comments (that may not be actions) coming out of the meeting.</p> <p>It is intended that the documentation in this section, combined with the other information in the AR1 form should mean that no additional minutes are required.</p>
PART 6: Educational transport	During	Educational transport should be discussed at each annual review meeting to ensure that the family is aware that this may be available. Also to assess whether the child may be ready to undertake independent travel training. The SEN transport policy is available from the AfC Local Offer
PART 7: Checklist and documents to append	During	<p>This checklist should be used at the end of the annual review to check that all points have been covered.</p> <p>The documents to append section should prompt the SENCo submitting the report to the EHCP coordinator in the SEN team to attach all the relevant documentation. (This should also be copied to the meeting attendees)</p>

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Person centred planning

A person centred planning (PCP) approach involves careful listening and learning in order to understand a child's or young person's choices about how they want to live their life and working out how to make that happen.

The Department of Health (DoH) defined five criteria for effective person centred planning in the guidance accompanying their 'Valuing People' White Paper of 2001. The criteria (adapted for children and young people) are as follows.

- The child or young person is at the centre of their plan
- Family members and friends are partners in planning
- The plan reflects what is important to the young person, their abilities and the support they need
- The plan results in action, that focuses on people leading ordinary lives
- The plan includes ongoing listening, learning and further action

A person centred planning approach will ensure the 'golden thread' of the child's or young person's aspirations genuinely runs through an education, health and care plan.

What does this look like?

In practice, person centred planning means ensuring the child or young person's wishes, choices and needs are not only taken account of, but central to all aspects of the planning and review process.

Whilst the approach ensures the child or young person is central, it also ensures that everyone involved has the opportunity to give their views and that those views are valued.

The approach has been proved to be a powerful one that fosters a spirit of willingness to participate and results in positive and productive review outcomes.

The aims of a person centred review are as follows.

1. To identify and discuss:
 - what everyone likes and admires about the child or young person
 - what is important to the child or young person
 - what help and support the child or young person needs
 - identify and share what is working well and not working well from different perspectives (the child's or young person's, the school's, the family's and others)
2. To agree actions that will:
 - support the child or young person to get what is important to them now and for the future
 - continue what is working well and change what is not working well
 - build the information gathered into a person centred plan

Holding a review using this approach and philosophy means some careful listening, thinking and preparation needs to take place prior to the review or meeting. This should be done to ensure the child or young person feels as comfortable and supported as possible in order to be involved.

Here are some things that need to be considered.

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Preparation

- The child or young person should be supported to prepare their views before the meeting by someone who knows them well and understands how they express their views.
- Some children's and young people's views and feelings will need to be gathered through time spent with the child or young person and close observation of their responses, reactions, moods and behaviours by someone who knows them well. They should then be presented in the meeting along with information on how the child or young person communicates: "Charlie communicates how he is feeling using a mixture of facial expressions, gestures, movements, vocalisations and behaviour. If Charlie is happy, he might flap his hands and giggle. If he is unhappy he might bounce up and down in his wheelchair and make grinding noises with his teeth."
- The child or young person should feel fully prepared for the process: what will happen, who will be there, what support they will have before, during and after the review or meeting and what their role will be within it. They may also be able to or want to add to, or help create the agenda and invitations.

Practicalities

Making small changes to the design and running of a meeting can make a huge difference to how comfortable a child or young person feels about taking part. Things that should be considered and arranged according to the child's or young person's wishes are:

- the venue: where does the child or young person feel comfortable or uncomfortable
- refreshments
- music and seating
- a favourite toy, sensory item or activity that the child can take in with them
- the time of the meeting: is it at a convenient time or does it clash with a child's or young person's favourite activity?
- the pace of the planning; perhaps it's better to do it in small bit size pieces or all in one go
- invitations and information about people who are attending – who would the young person like there? Can photos and easy read profiles of the other attendees be given to the child or young person beforehand?
- any information taken to the meeting needs to be created in a way that is accessible to the child or young person.

Support

What support does the young person need to understand the planning, to express their views and to agree or disagree with others. Support could be via an 'auxiliary aid' (which, in law, is described as anything from a piece of equipment to a person).

Examples of these could be:

- symbols or photos to show likes and dislikes
- simple 'yes' or 'no' cards for showing agreement or disagreement in the meeting or a big Mac switch to press to give views
- the child or young person's individual communication system – with appropriate symbols added to cover meetings and planning
- a person to support the child or young person throughout the meeting

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During the planning

With the correct preparation, resources and support, the child or young person should feel more comfortable about attending a meeting and empowered to share their views, in whatever way is most appropriate for them.

Ideally, the views of the child or young person should be heard first. Some children and young people will feel able to present their views with or without support, where others will need someone else to do this on their behalf. Where a child or young person's views have been gathered through close observation of the child or young person's behaviour, gestures or facial expressions, it is helpful for a child or young person's communication profile to be shared.

Any targets or actions need to match their aspirations of the child or young person and be agreed with by them. For example, if a child says they want to be a rocket scientist, they will have to learn to read and do some maths. If the learning activities reflect this theme, they will have more meaning for the child or young person.

Too often, children and young people are brought into the review at the end, almost like an afterthought. How would this make you feel?

After the planning meeting

It is important that the child or young person's involvement does not end at the end of the planning meeting.

They also need feedback following the meeting and a copy of the actions agreed in a way that is accessible to them. Providing a simple 'what we said, what we did' sheet could be a useful way of presenting the notes to the child or young person.

It is also important to find out how the process was for them - what worked and what didn't? Did they feel included and valued? Did they understand what was happening? Did they feel their views were understood and taken seriously by the other people in the room? If not, what needs to change?

For more information and resources on person centred planning, please see the Appendices.

How do you know this approach has succeeded?

The person centred planning approach has been proven to be a very powerful approach. With the right preparation and a commitment to participation, it is a highly effective way of helping people to listen, learn and engage with each other that brings about positive outcomes.

Ultimately, we will know if it has succeeded if the child or young person reports that they have been listened to, involved and that the planning and review process has made a positive difference to their life.

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Annual review – who does what?

Educational setting's role

- Convene the EHCP review, and along with relevant school or setting staff, invite the following to attend with at least two weeks' notice of the date of the meeting:
 - the child or young person
 - the child's or young person's parents or carers
 - involved education, health and social care professionals
- Seek (written) advice and information from everyone invited to the review meeting about the child's or young person's progress towards achieving the outcomes specified in the EHCP review and any other matters relating to their progress. This must be circulated to everyone invited to the review meeting at least two weeks before the meeting.
- Consider the continuing appropriateness of the EHCP in the light of the child's or young person's progress during the previous year or changed circumstances and whether changes are required.
- Set new short-term targets for the coming year and where appropriate, agree new outcomes.

Guidance for parents, carers and young people

- Ensure that you are able to attend the meeting. You can ask for it to be moved if you are unable to attend
- Ensure that any key professionals that you wish to have at the meeting are also able to attend
- Write your reports at least two weeks before the meeting; include anything that you think may be relevant in terms of better understanding the child or young person's progress towards outcomes. Include any information that you think may be relevant to defining additional needs or specifying different or additional provision.
- Make sure you include in your report what is important to you
- If you are considering a change or placement (a different educational institution) do take some time to investigate options prior to the meeting. (See section in this guide under education and health care plans, determining nursery, school or college placement
- If the local authority issues an amended plan, ensure that you write to them with any comments or changes that you would like within 15 days of the amended plan being sent to you.

ANNUAL REVIEW

SEN Team role

- Ensure that an annual review is conducted for every child or young person with an EHCP
- Review the documentation of the annual review meeting and either continue (no change), amend or decide to cease the plan
- Send any updated plan to parents and young person for comment
- Update a final version of the plan and issue it no more than eight weeks following the issue of the updated plan

Other professionals

- Provide information and advice in advance of the annual review in writing, focusing on progress towards meeting outcomes and any possible changes in needs or provision
- Attend annual review meeting (if at all possible)
- Discuss and agree changes needed to outcomes, needs or provision. Support with agreeing short term (e.g. annual) targets
- Review amended plan and feed back any comments to EHCP case officer and parents/young person