



Integrated Assessment Team

Annual Reviews

Aims of the session

- Understanding of the review process
- Awareness of time scales
- Knowledge of how to complete the New Paperwork
- Provide key dates for the year

What is a Review?

- Statutory process where, at least annually, the **progress towards outcomes** in conjunction with needs and provision is formally reviewed.
- The first review of the EHC plan must be held within 12 months of the EHC plan being finalised.
- Subsequent reviews must be held within 12 months of the previous review.
 - Settings should monitor progress towards the outcomes throughout the year.

Timeline part 1

Timeline	Actions
6 weeks prior to the review	<ul style="list-style-type: none">• Send invitations to parents / carers and relevant professionals• Request reports to form a pre review pack
2 weeks prior to the review	<ul style="list-style-type: none">• Collate reports from all invited and distribute as a pre review pack 2 weeks prior to the annual review• For those that cannot attend, gather opinions and feedback to those in attendance
The Review	<ul style="list-style-type: none">• Feedback opinions of professionals collated in the pre review pack• Provide an update against the outcomes and report progress
2 weeks following the review	<ul style="list-style-type: none">• Submit all documentation to the Local Authority as well as a copy to parent / carers and those invited.

SENDAnnualReview@bradford.gov.uk

New Paperwork: Part 1

- Complete and circulate pages 2 – 6 at least two weeks prior to the review
 - Attendance and attainment data
 - Progress towards outcomes
 - Education
 - Health
 - Social care
- Complete an edited EHC plan if you are proposing any changes
 - Evidence and advice must be provided to triangulate your proposed changes

NEW: Preparation for adulthood

- To be completed for young people in Year 9 (at the latest) and over
- Some EHC plans may require Strengths and Needs in these sections
 - Higher education and/or employment
 - Independent living
 - Participating in society
 - Being as healthy as possible in adult life
- These 4 sections are extensions of the 4 main areas of need not replacements

Preparation for adulthood

Area of need	Probe questions
HE and / or employment	<ul style="list-style-type: none">• Do they have a part time job? This could be paid or voluntary work• Have they completed work experience?• What are their career aspirations (triangulated with Section A)? What course are they studying which will / could lead onto either HE or employment?
Independent Living	<ul style="list-style-type: none">• Can they cook a simple meal or make a drink for themselves?• Do they understand the value of money? Can they apply this to a practical experience?• Are they able to travel independently? Do they want to learn how to drive (triangulated with Section A)?
Participation in society	<ul style="list-style-type: none">• Do they attend clubs / organisations in their community? What is the impact on doing so?• What networks do they have / are apart?
Being as healthy as possible in AL	<ul style="list-style-type: none">• Are they able to tend to their self care needs?• Can they make good choices in regards to diet?• Do they play sports or are they active in other ways and understand the benefits of a healthy lifestyle?

Remember when proposing changes to Section B

Strengths	Needs
<p>Pure can do's</p> <p>Positive statements</p> <p>What the child / young person has achieved</p> <ul style="list-style-type: none">• May indicate small steps which to the individual are positive achievements <p>Contains no negatives</p>	<p>Barriers to learning</p> <ul style="list-style-type: none">• Skills which the young person is 'yet to' accomplish• Areas / skills which they find difficult <p>Needs are not outcomes or provision</p> <ul style="list-style-type: none">• Do not mention that a child / young person requires something this is provision• If they need 'to do' something then this is an outcome.

Holding the review

- May be difficulties to hold a physical meeting
 - Social distancing
- Consider holding a virtual or remote review
 - Phone call between setting and parent
 - Conference call
 - Video sharing software

New Paperwork: Part 2 at the review

- Complete the **Summary of discussion** either at or following the annual review
- **Gather parent / carer and child / young person views**
 - This is key to effective co-production
- Feedback professional views
- Review the progress towards the outcomes
 - Discuss needs and provision where appropriate
 - Discuss your proposed changes to the EHC plan where appropriate

Important things to note

- If the setting are indicating they can no longer meet need then they must indicate this within the review minutes
 - Have professional reports been commissioned and implemented through a graduated approach?
 - Provide a detailed evidence trail through your graduated approach which shows advice has been implemented, reviewed with parents / carers and its impact.
- If a personal budget is being requested or reviewed the setting must indicate if they would be or are still in agreement with such and if not, why not.

Agreed actions/requests following the review

- Capture any actions that are required by professionals, school or the Local Authority following the review

Action:	By Whom:	By When:

Timeline part 2: After the review

Timeline	Actions
4 weeks after the review	<ul style="list-style-type: none">• The LA will notify all parties if it proposes to amend the EHC plan or not• If not, a 'no amendments' letter will be provided to the parent / carer / young person giving their rights of appeal.
8 weeks after the review	<ul style="list-style-type: none">• The LA will have provided a proposed amended EHC plan to the parent / carer / young person for them to make representations• The setting will also receive a copy.
12 weeks after the review	<ul style="list-style-type: none">• A Final amended EHC plan will be issued• A letter will be accompany the EHC plan to the parent / carer / young person giving their rights of appeal.

Transition reviews

Current EYFS, year 5 and 10 young people will require a transition review where preferences are gathered regarding placements for Primary school, Year 7 and Post 16 placements for September 2021. Below are two intermediate dates where we require preferences and Annual Reviews completed by:

- **Friday 18th September 2020** - requests for Specialist Provision (including Resourced Provisions)
- **Friday 24th October 2020** – request for mainstream provisions

Support

- Transition reviews
- Assistant Educational Psychologists
- Support network
- Offer suggestions in regards to B, E and F

Correspondence

- By the end of June 2020 families will receive letters requesting their preferences
- Striving towards being an electronic service therefore would request that responses are via email.
- Respond to the below email address using the following codes in the body of your email response:
 - **transitionreviews@bradford.gov.uk**
 - PP₁ – name of setting
 - PP₂ – name of setting
 - PP₃ – name of setting

When will families find out?

- Primary and Year 7 placements will be announced by **February 15th 2021**
- Post 16 placements will be announced by **March 31st 2021**

Things to look out for

- Guidance document
 - Key points on temporary legislative changes relating to coronavirus (COVID-19)
 - Links to SENDIASS
 - Oak National Academy
 - Update on 20 week process
- Risk assessments
 - Contact details
 - Email addresses



Thank you