

## **Project 2: Develop guidance and best practice examples of quality Annual Review Meetings.**

### **Project Background**

An Education, Health and Care Plan (EHCP) is a legal document written by the local authority and is intended to ensure that children and young people with special needs and disabilities (SEND) receive the support they need. If a child or young person has an EHCP, an Annual Review meeting will need to be held at least every 12 months, for school age children, to review what progress has been made towards achieving the outcomes that are specified in the EHCP.

The SEND Code of Practice, 2015, pages 194 – 200 describes what ‘must’ and ‘should’ happen when an EHCP is reviewed; this includes information on timescales, invitations and what needs to be reviewed. The document also states that in most cases, the Annual Review is led by the education setting, as they are likely to have close contact with and the clearest information about the child’s progress and next steps.

However the SEND Code of Practice does not state HOW the Annual Review should take place. This enables education settings to decide the format of the meeting and how the information gained about the child fits into the wider school reporting and monitoring.

Over the autumn term 2018, ten schools from across West Sussex engaged in a reflective practice project to consider how their Annual Review meetings are held and the information is used within the setting.

This project report captures key findings and practices, and raises key points for all schools and partners to consider when reviewing their own Annual Review practices.

“Embrace the freedom to personalise the Annual Review process to suit the context of the school and individual needs of parents and pupils.”

West Sussex Head teacher

## Project Approach

Ten schools from across West Sussex met on two occasions to share their current Annual Review practice, areas for development and to gain an understanding of the variety of approaches that could be taken.

Participating schools included special, mainstream primary and secondary with a varied demand for Annual Reviews. For example, a small primary school may only have one or two children with an EHCP, whereas this would be a pre-requisite for a child attending a special school.

At the beginning of the project, the majority of schools (seven out of ten) were holding 'traditional' style Annual Reviews which typically included:

- a formal agenda with everyone being seated around a table,
- all information being provided and collected in written form,
- the school arranging and chairing the meeting, with limited, if any input and feedback on the meeting style or experience from parents or children,
- the meeting generally focused on the education of the child within the school with a focus on learning outcomes for the following year and support required,
- parents attending, pupils remained in lessons,
- the meeting lasted between 20 mins and one hour.

At the beginning of the project, three out of the ten schools had begun to develop more 'person centred' style Annual Review meetings which involved:

- a facilitated, creative but structured meeting, often without a formal written agenda,
- Information being collected in multiple ways, often as visually as possible, and used to accompany written reports,
- the child and their views were kept at the centre of the discussion. The child either attended the whole meeting with their parent, or part of the session.
- the meeting included some discussion about the longer term holistic outcomes for the child, which enabled broader learning outcomes to be included with the following year's outcomes. This included support that could be provided by the family and community as well as by the school.
- the meeting lasted between one and two hours.

Whilst all schools agreed that over the course of the project they were keen to develop a range of sustainable practices for effective and person

centred Annual Reviews, it was acknowledged that there was also a need to:

- Gather the information required to complete the Local Authority Annual Review paperwork, the format of which was often seen to be a driver for a 'traditional' style meeting.
- Be mindful of school time and other resources.

"I don't think we can get away from the format entirely, but I am going to give it a more human shape rather than a form filling exercise." School

Each school was asked to capture its work and findings within a co-produced impact case study format, see Appendix 2 for further information. By the end of the project, all schools had used person centred approaches to develop their Annual Review practices.

The work was led by a small project team consisting of two mainstream primary schools, a mainstream secondary, a special school, Local Authority Officers and representatives from West Sussex Parent Carer Forum.

"Many parents don't know what their role is in an Annual Review, what it's for and the importance of it. So the whole process needs to include parents and their young people so that they understand what it is all about."

"We as parents don't get given a handbook as many professionals think that we do - so we don't automatically know what all the different meetings and assessments are, for some this can be very scary."

"The less formal, the more interactive and visual the Annual Review the better I think. I think the results/outcomes will then reflect this."

Parent / Carer quotes about Annual Reviews

This report has been written using information from the impact case studies. Blue boxes contain direct quotes collected from schools, parent carers and pupils during the course of this project to highlight the impact of the work.

"The realisation that the Annual Review process does not have to be a dry and dull procedure but one that is seeking to truly capture the child and their hopes and dreams breathes new life into the process." School

"Before, in my last Annual Review, I just sat there and let the adults talk without understanding what it was about. Now, it is all about me and it is more fun." Student

"As a school, our Annual Review process is smoother and more engaging...it is a more collaborative and celebratory process than it ever was." School

"It is the first time that my son wanted to stay in the full Annual Review and participate." Parent

"By streamlining the way we plan, gather information and run the Annual Reviews we are able to more effectively able to gather and present information and have it uploaded within the required timescale." School

## Key Areas Identified for Effective Annual Review Practice

### Preparing for Annual Review Meetings

**Get organised:** Develop a timetable of Annual Review dates for the year along with deadlines for reports and paperwork that will need to be included. Send this out to all those who are expected to contribute so key dates can go into people's diaries.

"Sharing the timetable has led to more engagement from teachers regarding feedback about the student and additional engagement from outside professionals. They may still be unable to attend [the meeting] but try to complete a report or provide feedback that can be used at the review so their voice is heard. We have also been asked to give school feedback to CAHMS, specialist counselling and medical team for the student for a future medical appointment so we feel more involved in discussing the student in a holistic way." School

### Develop a range of meeting styles that can be used to facilitate effective Annual Reviews:

The Annual Review meeting must be undertaken in partnership with the child and their parent and so should be tailored to meet the needs of the family and child. Taking a person centred approach will help to ensure that the views, wishes and feelings of the child and their family are heard and used to inform the discussion. A range of meeting styles can be used - various examples are included within this report. As part of this partnership approach, it is helpful to discuss with the parent and pupil the format of the meeting that you are intending to use. Not everyone will initially be comfortable with a change of structure and you may want to try out some elements of person centred approaches rather than the complete 'tool'. Some schools have also had

"We are running an Annual Review process that is sensitive to the needs of our individual families."  
Head teacher

"Regardless of the format of the Annual Review, you must 'buy-in' to the principles of person-centred planning. Children and parent/carers must feel that they have been listened to, heard and valued. The person chairing the meeting needs to facilitate this and may need to guide and direct other professionals who are less aware of the principles." School

"This initial meeting was a revelation to me. I discovered so much about this child just by asking a few simple questions. The three of us, child, LSA and I sat on the floor with paper and pens and we spent over an hour talking, laughing and reflecting on what this child wanted for the future. I found out that they love pizza, Shrek and Strictly Come Dancing and that they want to go in to the police service when they were older."

Member of staff talking about using person centred approaches with a child.

great success in holding a parent pre-meeting in the build up to the Annual Review, when parents are able to share their concerns in a less formal way.

**Open seating** is likely to encourage dialogue, and **refreshments** and music can help to create a more **welcoming environment**. Having some games / activities for younger family members and students to access in an area of the room is also a good idea should they want **'time-out'** during the meeting.

### **Invitations for and timing of meetings:**

Discuss with the parent / child who they would like to attend the Annual Review meeting. This could include a pupil's best friend, grandparent or family pet. Consider the parents childcare needs and working patterns to see if the session can be arranged around this. Some special schools hold Annual Reviews when the therapist is timetabled to be in school so they can 'pop – in' to provide information required and then return to 'hands on' therapeutic work with students.

"Communication style needs to suit the families involved so making this flexible is helpful. Emailing some families means they can engage in a "conversation" more easily and in their own time. For others, it needs to telephone communication so that I can explain what is going to happen etc. Some of our families do not like to be approached on the playground so phoning them before pick up to ask them to drop in tends to make these conversations easier." School

Have an **'Open door' policy** within your school to encourage families to share their concerns throughout the year rather than storing them all up until an Annual Review meeting.

**Circulation of paperwork before the meeting.** There is an expectation that Annual Review paper is circulated at least 2 weeks before the meeting. However, some pupils and parents can find it difficult to express themselves in writing and are more confident contributing verbally. If paperwork needs to be completed ahead of the meeting, consider who is available to assist with this. e.g. school office staff, Teaching Assistant, SENCO.

### **During the Annual Review Meeting**

Be aware of the **language used** – Avoid the use of acronyms and jargon. The language used should be understood by everyone in the meeting. To help with this, some schools have a squeaky toy in the room which can be squeezed if an unknown phrase is used. The Annual Review should also be holistic and include the child aspirations, as this enables the interests and career direction of the pupil to be supported. The PATH process and Local Authority Annual Review paperwork includes wording such as

“Hopes and Dreams” which can encourage this wider and longer term view. However, the language does need to be appropriate for the family and may need adjusting for students with complex needs or families still be coming to terms with diagnosis. Questions such as “What are your ‘super-goals’?” can be equally revealing and more sensitive which reflects the schools knowledge of the family.

It is important that the child’s views are represented during the meeting – this is often by the child attending to present pre-prepared information and / or join in the entire discussion. If the child is unable to

“We make sure that students practice talking about their dream by filming them beforehand so if the student feels they can’t do it or don’t want to, there is a video as back-up.” School

attend the whole meeting due to their age or level of concentration, it can be helpful to have some photographs of the child to remind others that they are at the centre of the discussion. If a child only attends part of the meeting, it is important for them to share their contributions at the start of the meeting and for a member of staff to update them on what has been discussed and gather their opinions on any actions.

“I was a bit scared of going into the first meeting because of all the people and I wondered what they would say about me. But it was actually ok...everyone listened to what I said and agreed with me. I knew it was okay to tell the truth about what I was finding hard. They had lots of nice things to say about things that they were proud of me for and I got to have my say about what my next steps would be.” Pupil

## Resourcing the Annual Review Meeting

To enable the Annual Review meeting to run effectively, it is good practice for the **chair / facilitator** to explain their role in the meeting as this may be different from the role they may have at other times within the school. The facilitator / chair will need to explain the structure of the session and highlight the key things that need to be achieved (e.g. ensure views and wishes are heard, agree on progress the child has made in achieving their outcomes and to consider if outcomes and targets are still appropriate). If an agenda is being used consider how it is presented, could it be on a flip chart rather than on A4 paper? If you are using paper handouts, how are they presented – could colour or images be added that the child has made? If you do not have time to personalise for each meeting, have some that you have co-designed with several children. Consider laminating and having several in the room for use.

Another role of the chair / facilitator is to highlight, where there are differences in opinion or observations, that neither person is right or wrong, but simply that a child can present in complex ways.

Some schools have embraced the partnership approach and support the child to co-facilitate the meeting. For example, the child's view is captured ahead of the meeting, in this example, for the 'What's working well' and 'Dreams' sections. The child then decides how they want the meeting to begin, e.g. 'The Dream' or 'What's working well' and suggest the pictures and drawing that they would like included.



It is helpful to have a **second member of staff** e.g. admin support, teaching assistant, in the meeting to help take notes – this could be in graphic form on a wall paper or through more traditional notes taking. Supporting the meeting in this way enables the facilitator / chair to have good eye contact with those in the meeting to enable conversation to flow.

"I often begin the meeting by telling the child that I am their assistant so will do all the writing while they are 'in charge' of the meeting." SENCO



## Useful person centred tools which can be used for effective Annual Reviews.

Person centred planning is personal. The approach in any meeting needs to take into account the purpose, personality and practicalities of the situation. Think about what works best for the child and their family and with your school. It is essential to remember that the essence and purpose of these methods is to be holistic; centre around the child and their journey and future; ensure that they are involved in any plans or actions that will affect them. A range of person centred tools are highlighted below. A 'person centred' tool helps to provide structure to the conversation and captures information.

### PATH / MAP

PATHs and MAPs are two examples of person centred planning tools. These enable a structured conversation that will help to discover what is important to a person and agree the opportunities and support required to give them the best chance of experiencing this. The facilitated PATH and MAP discussion is captured as a large graphic, which allows the child to visually share their 'dreams and aspirations' or long term outcomes with parents and staff.



A **PATH** works by visualising a future / dream / super-goal and then working backwards from this vision to plan how it can be brought into being. For example: During the 'One Year On' section, targets and outcomes towards the 'dream' are agreed. Short term achievable actions are also noted as 'next steps' that will help them to move towards this. Research has indicated that the use of a PATH has a positive impact on children and young people's confidence and motivation in achieving their goals.

"Parents say that they never thought it was their child's dream and they had another idea in mind for them. Drawing the Dream allows a conversation between parents and students about their future. It is a very useful tool." School

A **MAP** begins with the person's history and milestones so the group can get to know them and then 'dream' with them. The MAP also gives an opportunity to touch briefly upon worries for the future in the form of the

"I am surprised when I see my dream written up on the board because it looks more organised than in my head. It helps me visualise what I will become in the future." Student

A full description and guide to the process is available on [The West Sussex Local Offer](#).

Capturing the discussion graphically can be beneficial for those who have lower literacy levels or English as an additional language, and can also help to create a relaxed environment, as those attending focus on the graphic rather than having to maintain eye contact with each other.

If the group is large, schools typically capture the discussion on large sheets of paper or on a 'white' board. If the conversation is scaled down to the child and one facilitator, the conversation could be captured on a sheet of A3 paper.

Schools include images from the PATH /MAP within their Annual Review paperwork and also as part of their school records which are shared with other staff.

Some schools find that 'supergoals' is a more tangible name for the 'dream' section, this can also be more appropriate for children with very complex needs.

Either the whole process can be followed or some of the sections. For example, some schools focus on 'The Dream' and 'One year on' in the meeting.

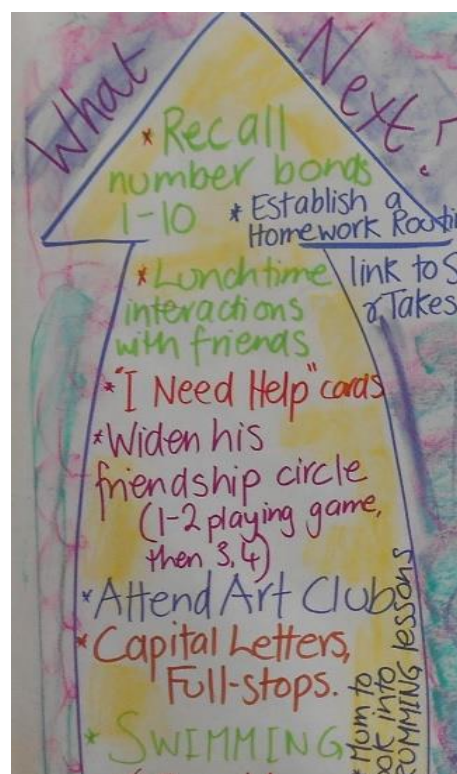
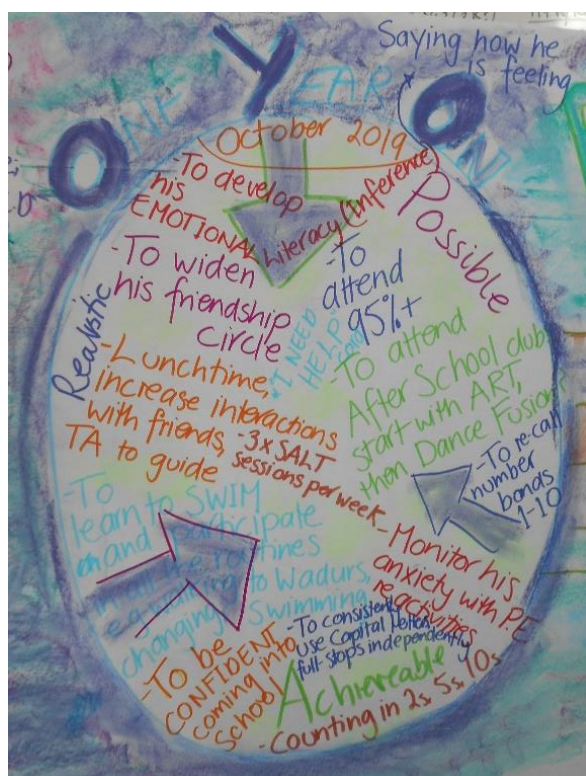
One school has simplified the PATH so it captures 3 main sections.

Hopes and Dreams → One Year On → 'What Next?'



"The 'One Year On' Section is used to drive the outcomes and targets for the child for the year and is incorporated into the child's Individual Education Plan (IEP).

For example: The table below shows how the 'One Year On' targets are incorporated into the child IEP. The 'What's Next?' section is used for short term targets. The majority of these are put into the child's IEP.



<p>Xxxxx will interact with his peer group to form relationships which will be maintained over time. Xxxxx will feel welcomed and supported in his learning environment. Xxxxx will engage in activities beyond those that are self selected. Xxxxx will recognise emotions in himself and others in order to behave appropriately within and between social situations. Xxxxx will adhere to the basic boundaries within</p>	<p>I can play with some people at lunchtime</p> <p>I can build friendships with people in my class</p> <p>I will feel positive about moving from Y2 to Y3</p>	<p>TA [redacted] to supervise and encourage Xxxxx to widen his friendship group at lunchtime and engage in games/play. [redacted] to monitor and report back to class teacher.</p> <p>Daily with [redacted] Small group to play an organised game. Some games will be [redacted] choice others not. Start with 1:2, then 1:3 and then 1:4. Teacher will choose the children guided by [redacted] choice.</p> <p>Booklet will be created to support transition from Y2 to 3. Transition afternoons, plus an additional small group session will be arranged for Xxxxx to meet his new teacher.</p>
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Review meetings are held throughout the year to consider the progress made, what has been achieved, what needs to be changed for the child and identify any new relevant targets. The notes of these updates are recorded on the PATH and IEP targets adjusted. The 'One Year On' targets are reviewed in detail a year later at the child's next Annual Review meeting – as a celebration of the child's progress throughout the year.

“The PATH tool enables us to keep the child’s EHCP outcomes alive and relevant – not remaining as black and white statements in a document in a file.” School



“I found the PATH process for the EHCP review very informative and reflective. I have never completed an Annual Review before and wasn’t sure what to expect. I found the whole process very visual and it provided a very good understanding of the needs of the child. We started the process thinking ahead to the future and thinking about his and our aspirations for him when he is grown up. We then thought carefully about what he needed now to support his learning and development and broke this down into small achievable targets. The poster that was created helped me to clearly see how these small steps would help him to achieve the future targets. I was impressed with how well the child engaged with the process and interacted with the poster.” Parent

Review Meeting	
<p><b>What is going well?</b></p>	<p><b>Which targets have been achieved?</b></p> <p>(Vor X)</p> <p>I can develop a positive attitude to maths</p> <p>I can develop my touch typing skills</p> <p>I will attend the after school art club</p> <p>I can make sure that the font size on my worksheets/tablet are right for me so I don't tire</p> <p>My teacher will attend the training offered by the sensory support team so they understand my needs fully</p> <p>I can type my work using the computer</p> <p>I will form a positive relationship with my new Yr 4 teacher</p> <p>I will go to after school clubs of my choice</p> <p>I will talk to all the new Yr 3 children about my disability so they understand my needs</p> <p>My new class teacher will meet with (sensory support team) so my teacher understands my needs</p> <p>I will attend lunch club with a friend when I want to go</p>
<p><b>What could be better?</b></p>	
<p>Targets set for to achieve this academic year</p> <p>What needs to happen next?</p>	

An example of a blank record sheet that the class teacher and other staff are asked to complete before the Annual Review meeting

Review Meeting 30/10/2018	
<p><b>What is going well?</b></p> <ul style="list-style-type: none"> <li>Maths at his pitch for him</li> <li>Responding well to</li> <li>Copes well with the changes</li> <li>Follows routines well</li> <li>Fluently improving</li> <li>Working better in small groups - learning to share Fab with</li> <li>Ways better in small groups (occasional disagreements)</li> <li>I pads usage (idea generation)</li> </ul> <p><b>What could be better?</b></p> <ul style="list-style-type: none"> <li>Still struggles at playtimes</li> <li>Drawn to some of the trickier characters outside - this can lead to arguments!</li> <li>Struggles at playtime but drawn to characters that cause him issues</li> <li>Ready I want to read Phonics (help reading)</li> </ul>	<p><b>Which targets have been achieved?</b> (Vor X)</p> <ul style="list-style-type: none"> <li>I will begin to think about my new secondary school (transition) <i>Relevant issue</i></li> <li>I know my number bonds to 10 and 20</li> <li>I can complete an independent task 3 X weekly</li> <li>I can read simple books at my level and answer questions about the story/information I have read</li> <li>I can recognise, read and spell HFW (200 HFW words)</li> <li>I can sound out letters to help me spell words</li> <li>I can develop my questioning, reasoning and comprehension skills</li> <li>I can follow a set of instructions - achieved.</li> <li>I understand the vocabulary around my class topic. I can use word maps to facilitate and embed vocabulary learning - ongoing work week 2 - important</li> <li>I can use words related to my topic</li> <li>I know what the word means, how many syllables it has in it, when and how I can use the word</li> <li>I can follow instructions that contain the following concepts and use these within a short sentence:             <ul style="list-style-type: none"> <li>- before and after - still struggles not consistent</li> </ul> </li> <li>Ordinal - first, second, third etc</li> <li>I can use the irregular past tense 8/10 times with a structured activity</li> <li>I can write the HFW that I am learning to spell accurately - inconsistent though!</li> <li>I can practise my handwriting using the handwriting sheets sent home</li> </ul> <p>For Review Meeting 30/10/18</p>
<p>Targets set for to achieve this academic year</p> <p>What needs to happen next?</p> <ul style="list-style-type: none"> <li>Enhanced transition programme currently not running at SA - this will be an issue - flag heavily with SENCO</li> <li>Mandarin - private time</li> <li>Continue with small group: maths at his level in real-life contexts</li> <li>Transition to SA - Continue with small group: maths (Real life contexts)</li> </ul>	

An example of a record sheet completed by a class teacher and teaching assistant who work with the child. The completed record sheet is given to the SENCO before the Annual Review meeting.

Some schools start the PATH, e.g. 'The Dream' section, with the child ahead of the Annual Review session and then ask the child to 'present' their dream in the meeting. Some children can feel uncomfortable being 'put on the spot' so consider alternative ways such as audio and film recordings.

"We included the 'One Year On' wheel and from that the child was able to set their own targets e.g. 'By next year I want to be choosing books from the class library shelves not just scheme books'. Now that the class teacher realises how important that is to this child, she is going to ensure that there are books available at the correct level in class and on the shelves." School

"Using the Person Centred Approach keeps us focused through the year as it gives us all a shared vision for the child, has real meaning for the child and their family and makes a commitment to moving towards the future for the child." School

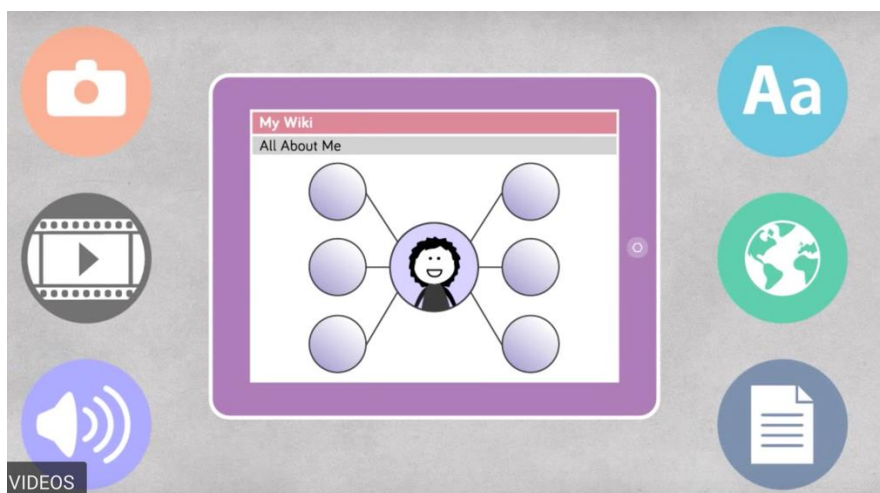
"The 'One Year On' poster has a good visual impact and is easier to read and follow than all the reports that we have to read through. Ultimately it shows what good communication there is between school and parents, the progress our child is making and the targets our child is achieving - this can only be of great benefit for everyone concerned.

The Annual Review meeting is a very positive experience for us as parents, it focuses on the positive aspects of our child's school life, it is also a great opportunity to discuss matters that need improving and to voice any concerns that we may have.'

Parent

## Wiki

Wiki's are simple personal websites which can be used to create multimedia person centred plans with pictures, words, videos and sound to capture the voice, skills, aspirations and needs of an individual. Wiki's are secure and private and typically 'owned' by the family and child who decide what information they want to share and whom to share it with.



Wiki's can also be used to share information such as Education, Health and Care Plans, Annual Reviews and reports from professionals.

Some schools have been piloting the Wiki as a tool which can be used to share information as part of the Annual Review process. As the Wiki is a web based platform, schools approached a small group of parent carers who had access to the internet and were confident with IT.

The school initially shared information with parents about the Wiki which is available on [The West Sussex Local Offer](#), to provide an overview of what it was and the benefits of developing a site. An example of a Wiki created for The Local Offer is shown below.



Parent carers were then asked to talk to their children about developing a personal Wiki and a training session was arranged at the school (delivered by a member of West Sussex Parent Carer Forum) to create the basic Wiki with the child, parent, SENCo and class teacher.

“XXX is very excited about creating her own Wiki and said that she would be able to make more people aware of her disability and also show how important her family are by sharing the information with close friends and family.” Parent

“A Wiki is a fantastic opportunity to see how X progresses through the year by entering her own vision, hopes, dreams and achievements. I have also had the opportunity to look at the West Sussex Local Offer page to watch the video about Wiki which has given me a better understanding of how it will work.” Parent



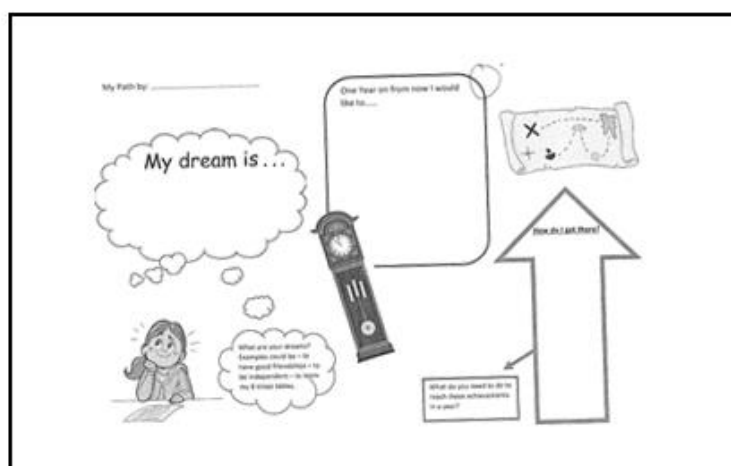
## Developing your own person centred tools

Some project schools have developed their own tools for supporting Annual Review discussions with pupils.

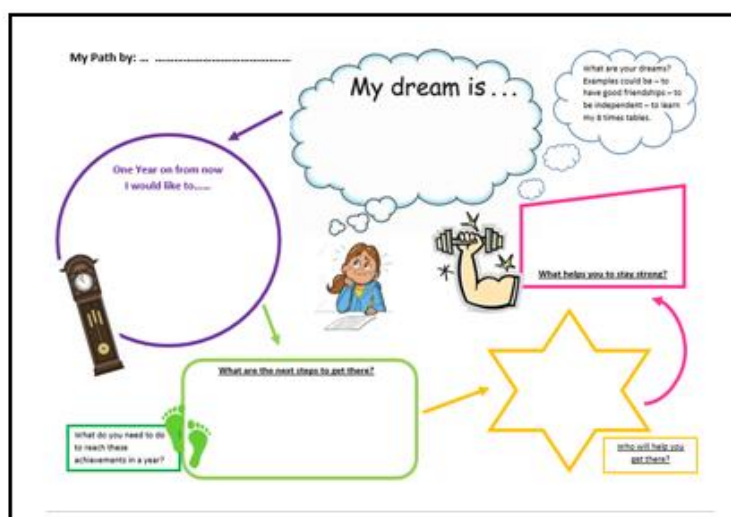
For example:

This **one page visual tool**, shown below, is based on the **PATH**. The first draft was shared and trialled with students and feedback gained. The final draft is also shown which includes many of the changes proposed by students, for example, the addition of arrows and colour as well as the choice to complete the template ahead of the Annual Review meeting. Preparing the template ahead of the Annual Review meeting also enables parents to view their child's dreams, feelings and worries without influencing them themselves as the students are able to speak a little more freely, and have time to reflect and answer questions. The school has also been using this format to support and calm students with high anxiety.

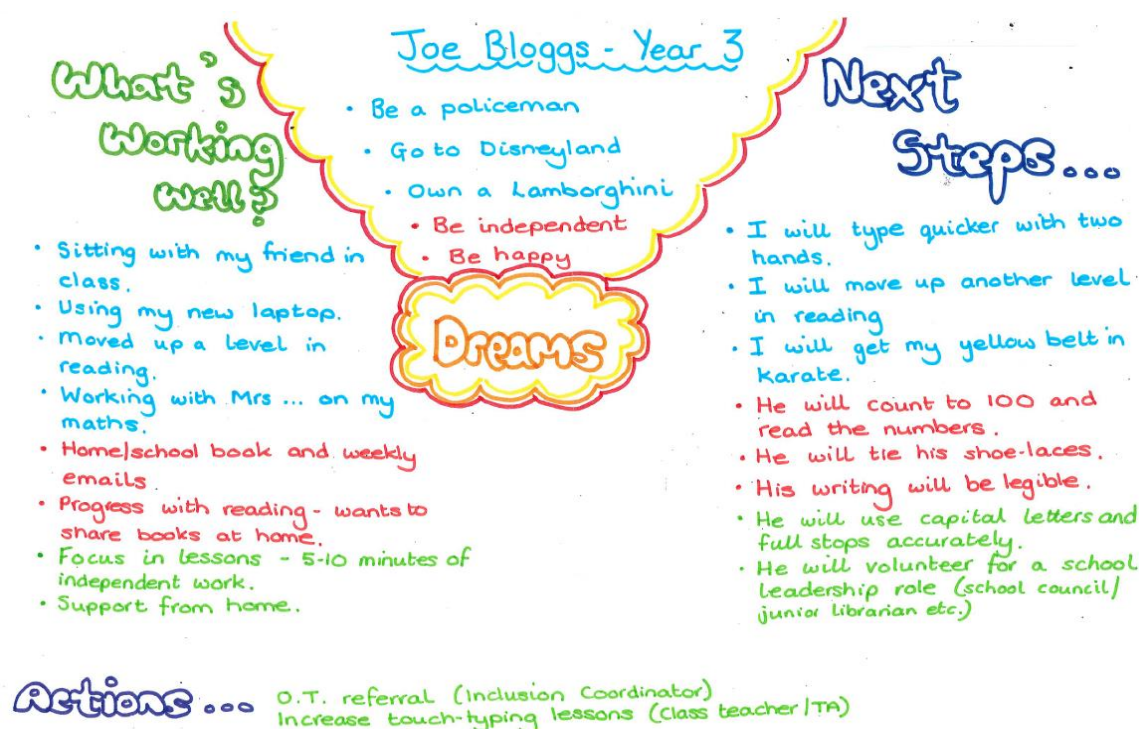
First Draft:



Final Draft:



Another school uses a **large sheet of paper** to capture the views of the child, parent and staff. Each person's view is collected in a different colour. An example is shown below. The child's views are captured before the Annual Review meeting to enable them to act as the starting point for the discussion. The conversation refers back to the child's dream wherever possible, for example, discussing the skills required to be able to be a policeman include writing and reading for reporting purposes etc. The annotated paper is revisited several times a year and additional comments are added to the discussion.



"I like talking about my dreams. It is funny when [INCO] can't spell the cars I want to buy or the footballers I want to be like. We have to look them up on Google in the meeting so there aren't mistakes on my big sheet of paper. I like that everybody encourages me to have lots of dreams and we think about what I would like to do, where I would like to live and visit and things I would like to have." Pupil

"I like having the big paper on the table that we can all see. When the staff are making additional notes, they always explain what these are (normally actions for them to complete) but otherwise everyone can see it all. It feels more open." Parent

## Powerpoint

Some schools support pupils to prepare a short Powerpoint presentation ahead of their Annual Review and to present this during the meeting. The Powerpoint is used to express the child's view.

Students are given some key topics and sentence starters such as 'Life / I like / School / Support / The Future' to help structure the information.

"Students said that the Powerpoints have made them feel more confident about being able to express their ideas as part of the review." School

"By working with the students beforehand we are able to catch their thoughts and ideas about strengths / difficulties / interests and future aspirations in a less stressful way." School

The following images are some excerpts from 2 students Powerpoints.

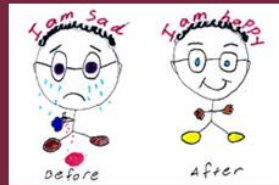
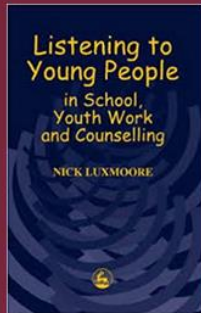
"We have found that students do like to take part and prepare their role prior to Annual Review so they can "perform" in front of the Annual Review audience rather than feeling they have been put on the spot during the meeting." School



And I enjoy learning if I have the right support. My biggest issues in school are confidence and anxiety of getting things wrong.

It would help me if you checked my understanding and started me off so that I don't panic.

# HOW CAN YOU HELP ME IN SCHOOL?



Help in class  
Get to know me  
Don't judge me  
Don't treat me differently



"The Powerpoint on student X made me appreciate how hard things can be for her, she has obviously been through a lot."

"This is much better than receiving a written report on a child's needs. A simple Powerpoint is more engaging and, if I'm honest, I'm actually more likely to read the information within it."

School

"Staff have said that having a copy of the Powerpoint is an effective way of providing key information about a child they are teaching and gives them a good understanding of what they can do to support the child in their lessons. " School

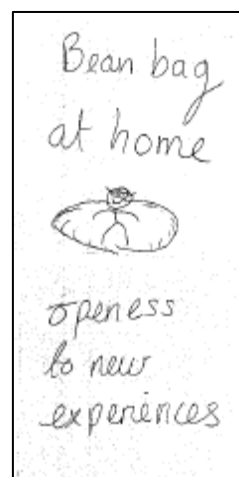
## Post-its

Post-it notes can be used to collect the views of the pupils, parents and staff working with the child. One school colour coded the notes to cover three key areas

- What is working well
- Things that could be better if...
- Hopes and Dreams (not shown below).

The school found the use of 'Post Its' a useful tool as they:

- Provided a visual aid to support and guide reflective discussion with the pupil
- Enabled common threads to be identified
- Acted as a 'warm up' exercise for the pupil prior to the Annual Review



## Photographic pupil comment form

The pupil use photos and drawings to share what has worked well for them and what has been more difficult.

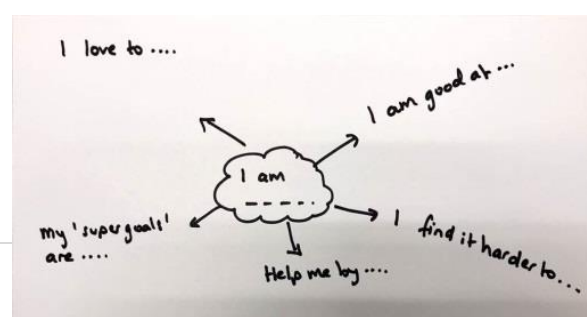
"Pupils have been more engaged in and less daunted by attending the meeting by talking about their pupil comment form". School

## Learning Highlights

The pupil chooses some work or activities that they are proud of or feel that have progressed well in over the year.

**Mind Maps** – another example of a simple visual tool.

"I liked drawing about myself, it gave me ideas." Child





## Presenting other school data and information

Schools also present a variety of data and information to inform the Annual Review discussion. This typically involves the child class teacher or SENCO reporting on academic and wider progress and achievements over last year including progress in therapy provision, outreach activities and the pupils approach to learning. If the child's class teacher is unable to attend the meeting consider including audio or video clips from them and other staff and professionals who work with the child. Schools are also likely to look at attendance and exclusion data as well as other information that is stored on pastoral and safeguarding tracking systems.

The child's Individual Learning / Education Plan and Personal /Pupil Profile are also updated during the meeting as they need to reflect the targets and outcomes agreed. Several schools have updated the format of these documents to highlight the child dream or aspiration.

The **Individual Learning Plan (ILP) / Individual Education Plan (IEP)** is reviewed on a regular basis with parents, professionals, staff and pupils throughout the year. Including the pupils 'super goals / aspirations' on the ILP / IEP is helpful as it reminds readers of what is important to the child. The ILP /IEP should also include the broad outcomes from the EHCP and break these down into yearly outcomes/targets and smaller manageable steps.

Outcomes should be wider than Cognition and Learning, for example Communication and Interaction, Social, Emotional and Mental Health, Sensory and Physical.

### One Page Personal Profiles / Pupils Profiles.

These one page documents provide a summary of the child's needs and how they can best be supported. The child's ILP / IEP and Pupil Profile need to relate to each other: several schools have reflected that the child's 'Pupil Profile' has become the introductory 'front cover' to the fuller ILP / IEP.

"Teachers and Teaching Assistants are clear about the outcomes on the EHCP as they are on the ILP and discussed regularly."

"Parents and children feel their views are heard and both feel equal partners in the process."

School

Personal Profile

Date:

Here I am

What do I like about me?

What do I like about me?

What do I like about me?

What do I like about me?

What do I like about me?

What do I like about me?

What do I like about me?

What do I like about me?

What do I like about me?

What do I like about me?

## Outcomes tracker

Some schools have identified that the EHCP is not updated by the Local Authority after every Annual Review meeting. This is because the outcomes in the EHCP are longer term outcomes and are only updated at key transition points or if a specific change is requested. In light of this, some schools are developing their own outcomes tracker sheets which track outcomes achieved against the boarder EHCP outcomes.

“The Outcomes Tracker has ensured that we have a running record of outcomes, an evaluation or progress towards them and new or amended outcomes. This has enabled us to track the progress of individuals more effectively in a format which is easy to follow. There has been a particularly positive response from parents and professionals to the tracker.” Head teacher

“We have found the outcomes tracker so helpful and have shared this with other schools who have also given positive feedback.” School

Date reviewed	Ref	Outcome (Bold) Blue - achieved outcomes <i>Italics comment</i> Red - new outcome	Continued / Achieved / New Outcome Agreed Please date
	E1	<p><b>A can successfully engage with his peers</b></p> <p><b>A is a confident communicator who can express his needs, wants and feelings.</b></p> <p><i>A has become a confident communicator and can clearly express his needs, wants and feelings. At times he can be rather dominant when playing with his friends and needs reminding to take turns and use kind hands.</i></p> <p><b>A will successfully engage with his peers at his outreach setting, and in class, thinking about other children's feelings.</b></p> <p><b>A will be willing to accept other people's ideas rather than purely focusing on his own.</b></p>	<p><b>Achieved</b></p> <p><b>New Outcome</b></p>

Outcomes Tracker example

## Gain feedback from parents and pupils about the school's Annual Review process.

Consider how your school is gaining feedback from parent carers, pupils and staff on the Annual Review process. This is likely to depend on the number of children you have with EHCPs in your school. For example, in a special school where over 100 Annual Reviews might be undertaken, Annual Reviews are a regular agenda item on parent partnership meetings and

“The parent partnership committee has provided a forum for gaining parents views on the effectiveness of the Annual Review process. The number of parents engaging in the Annual Review process has increased to 100%.” Head teacher

all parents are sent a yearly Annual Review questionnaire. If your school only has a few children with EHCP's you may want to gather feedback from parents on an individual basis. Remember that feedback may only give part of the picture, for example a parent may say they are 'happy' with the current situation but are unaware of the alternatives. Sometimes it can be helpful to test out different ways of working with new parents as they have not become used to how the school does something and may be more open to trying out an alternative approach.

### **Create opportunities for parents to develop peer support networks**

Do you have any parents who have already been through the Annual Review process? Are there opportunities for them to volunteer to support parent carers who have only just obtained an EHCP for their child or are experiencing the Annual Review process for the first time? A coffee morning could help with this. Alternatively, your school may want to encourage parents to attend the 'Coffee and Cake Networking Events' facilitated by [West Sussex Parent Carer Forum](#).

### **Develop a positive whole school ethos**

Have an 'open door' policy and support staff to be available to assist families as needed. For example, train office staff to understand how the Annual Review paperwork needs to be completed so they can help parents fill in the relevant sections ahead of the meeting. Front office staff also have a key role in making parents feel at ease whilst they are waiting for their child's Annual Review meeting.

"I don't feel so nervous this time".  
Parent talking to office staff about  
their child's Annual Review.

If a child or parent has also had a negative experience in the past and is used to being told "what is wrong" with their child, they may find it initially difficult to celebrate their success as they are not used to their child being praised. Be patient and brief the parent ahead of the meeting, explain that you will be asking for everyone to highlight some compliments / things to celebrate and that they may want to rehearse saying them out loud, alternatively they may choose to add their comment as a 'Post-it' note.

"Children and parents need to feel that all staff working with a child have the same information and understanding. Having a robust communication process and high expectations for the engagement and behaviours of all staff is essential." School

Some schools are developing 'Welcome Packs' which are given to parents if their child has an EHCP when they join the school or, if already at the school, when the EHCP is agreed.



## A school 'Welcome Pack' could contain:

- An explanation of the school's Annual Review process and how this fits into whole school assessment and reporting cycle.
- A description and examples of documents that are typically used to support the child, e.g. One Page Profile, Individual Learning Plan, Costed Provision Map – and how these documents 'fit' together.
- A description of what happens before / during / after an Annual Review meeting along with information of those who might attend, who organises and chairs / facilitates the session and how parents can prepare for the meeting.
- A timeline of key events, e.g. during the Year 5 Annual Review meeting choices for secondary school are often discussed.
- Photographs and contact information of 'Who can help' at school and when they are typically available. For example, school office with filling in paperwork, SENCO at weekly 'drop in's'.
- A reminder of what an EHCP means in terms of learning in school and why an Annual Review is needed.
- Useful groups and forums – in and external to school e.g. school parent group, WSPCF Network Events, Reaching Families.
- Links to WSX Local Offer – with some screen shots of information that parents might find particularly useful.
- Descriptions of the roles of key professionals who may support the child e.g. Speech and Language Therapist, Educational Psychologist, Learning Behaviour Team Advisor, Child and Adolescence Mental Health Service and Autism and Social Communication Team Advisor.

### What you need to know about an Annual Review meeting at xxxxxxxxxxxxxxxx school

#### Picture of your Primary school



The annual review process is a way of parents, carers, schools and Special needs assessment team, working together to make sure your child has their needs met both emotionally and academically met within school.

#### Why have, a yearly Annual review meeting?

Your child's Annual Review meeting is the opportunity to discuss whether the targets that are within the Educational Health Care Plan (EHCP) are still important or whether they require updating.

"Knowing I can meet with school staff every term is great. The Annual Review doesn't feel so overwhelming now as we meet regularly and so there are no surprises. If the school have concerns, we have normally already discussed them by phone or in a meeting at the beginning or end of school anyway." Parent

"The new style of meetings has made me realise how much I didn't know about some of the children! It has been really interesting to find out more about the families and how school and home impact upon each other. We have been able to adapt our curriculum topics based upon information that has come from the meetings." Staff

Annual Reviews need to be part of the school assess, plan, do, review cycle – not seen as a one off event. Outcomes need to be considered and reviewed regularly to ensure provision is having impact. By developing a system where all staff have a role in reviewing the child's progress, the whole school team feels empowered and has a better understanding of the child's aspirations and how

```

graph TD
    Central["Open Door access to class teacher and Inclusion Coordinator  
(telephone, email, face-to-face)"]
    
    %% Top Path
    AR["Annual Review Meeting  
(parent, child, class teacher, Inclusion Coordinator, professionals)"]
    U1["Updated ILP shared"]
    P1["Progress towards outcomes reviewed"]
    PC1["Parent/Carer meeting  
(parent, child, class teacher)"]
    OS1["Optional SEN Review meeting  
(parent, child, Inclusion Coordinator)"]
    U2["Updated ILP shared"]
    P2["Progress towards outcomes reviewed"]
    
    %% Bottom Path
    OS2["Optional SEN Review meeting  
(parent, child, Inclusion Coordinator)"]
    PC2["Parent/Carer meeting  
(parent, child, class-teacher)"]
    U3["Updated ILP shared"]
    P3["Progress towards outcomes reviewed"]
    PC3["Parent/Carer meeting"]
    U4["Updated ILP shared"]
    P4["Progress towards outcomes reviewed"]
    
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    Central --> OS1
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    Central --> PC2
    Central --> PC3
    Central --> PC4
    
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Also see information above for examples of how the PATH and Outcomes Tracker are being used to embed Annual Reviews within whole school cycles.

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## Appendix 1: Resources and Links

**PCP facilitators guide – this contains information on PATH.**

[https://westsussex-local-offer.s3.amazonaws.com/public/system/attachments/691/original/PCP\\_facilitators\\_guide\\_June\\_2017.pdf](https://westsussex-local-offer.s3.amazonaws.com/public/system/attachments/691/original/PCP_facilitators_guide_June_2017.pdf)

**PATH training clips and examples of use (towards the bottom of the page)**

[https://westsussex.local-offer.org/information\\_pages/128-person-centred-planning-pcp-path-training-videos](https://westsussex.local-offer.org/information_pages/128-person-centred-planning-pcp-path-training-videos)

**MAP training clips**

[https://westsussex.local-offer.org/information\\_pages/388-person-centred-planning-pcp-map-tools](https://westsussex.local-offer.org/information_pages/388-person-centred-planning-pcp-map-tools)

**West Sussex Annual Review Paperwork**

[https://westsussex.local-offer.org/information\\_pages/48-annual-review-paperwork-forms](https://westsussex.local-offer.org/information_pages/48-annual-review-paperwork-forms)

**Helen Sanderson Associates – examples of person centred tools.**

<http://helensandersonassociates.co.uk/person-centred-practice/person-centred-thinking-tools/>

**Inclusive Solutions – examples of Person Centred Tool**

<https://inclusive-solutions.com/person-centred-planning/>

**SEND Code of Practice**

<https://www.gov.uk/government/publications/send-code-of-practice-0-to-25>

**West Sussex Parent Carer Forum**

<http://www.wspcf.org.uk/>

**West Sussex Local Offer**

<https://westsussex.local-offer.org/>

## Appendix 2: Case Study Prompt sheet

### **Develop guidance and best practice examples of quality Annual Reviews in mainstream and specialist setting– Case Study Prompts**

Please ensure your case study report is anonymised so students cannot be identified by name or by a specific characteristic. Parent carer consent will need to be gained if specific students, rather than general SEND cohort are the focus of the report.

There is no official word limit for your case study – however as a guide, they should be no more than 4 sides of A4. Please include a level of detail that would enable the reader (parent, professional, another school) to understand what you have done, the impact this has made in order that they could replicate the work. Photos and diagrams can really help with this.

#### **Case Study Context: Why are you doing this work?**

- Briefly describe your school / setting – size, type of school etc.
- What Annual Review practice is currently working well in your school/setting? How do you know? Are these views shared by students and their families?
- What are the Annual Review challenges in your school? How do you know? Are these views shared by students and their families?
- What does your school hope to achieve by engaging in this project?

#### **Case Study Focus: What will you do to develop effective Annual Review practice in your school?**

- Describe the focus of your case study –will this be on general school Annual Review practice or for an individual?
- What data and information about a child is shared as part of the Annual Review process? How is this gathered across the year? What information is shared about a child's life outside of school to build a holistic view of the child / young person? How is information from all stakeholders involved in this process? E.g. child, parent carer, friends, staff, supporting professionals?
- Describe the person centred activities and practice you are using to develop effective Annual Review practice. Has this been co-designed / developed with students and parent carers?
- How do you engage parents and children who find it difficult to contribute to an Annual Review?
- How do you engage children and adults with additional needs? E.g. short attention spans. Sensory impairment, non-verbal or have English as an additional language?
- How will the information from an Annual Review be used to inform daily practice and make a difference to a child's progress?
- How will you evaluate the effectiveness of your Annual Review process to know the practice you are putting into place is of benefit?

## **Outcomes and Next Steps: What impact has this development worked had on your schools Annual Review practice?**

What impact has your Annual Review development work had on:

- (1) the child – how do you know? What evidence is there to support this?
- (2) their family – how do you know? What evidence is there to support this?
- (3) whole school approach, policy and practice? - how do you know?
- What are the next steps for the child and their family? Do the child and their family feel included in these 'next steps'? What evidence is there to support this?
- What are the next steps for whole school practice and policy?
- What worked well? Why do you think this was?
- What hasn't worked? Why do you think this was?
- What further adjustments could you have made to increase effectiveness?
- What strategies, interventions, training and changes will need to be implemented at both whole school and individual student level as a result of this Annual Review work?
- How did you co-design and captured the 'voice of' the student and their parent / carer throughout the process?

## **Reflections and recommendations for future Annual Review practice**

- What is the impact of this work on your own professional practice?
- What will you do differently as a result of this project?
- What learning has happened as a result of this project?
- What recommendations would you make to other schools to support Annual Review practice?
- What recommendations would you make to students and their families? What recommendations would students and their families make to you?
- How will this work be sustained and embedded beyond this project?
- How has this work impacted on cultural change?
- What 'Top tips' do you have to share?
- Are there any 'Frequently Asked Questions' or 'Annual Review Myths' that you have come across? If so, please share to inform a project report.
- What support / information would you like to further develop Annual Review practice?