

**Transfer review: guidance for schools**

Introduction

This is Leicester City’s guidance to schools on the process for converting statements to Education, Health and Care (EHC) plans.

Following the introduction of the Children and Families Act 2014, children and young people with statements of special educational needs (SEN) are being transferred to EHC plans. More information about EHC plans and local authority’s transition plan and timeline for converting statements to plans can be found on the Leicester City’s Local Offer website:

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

Children and young people with statements will continue to have the same rights and support through their statement of SEN up to the point that this is converted to an EHC plan.

The transfer review

Children and young people with statements of SEN are being transferred to EHC plans through a transfer review as part of an assessment of the child or young person’s education, health and care needs.

A transfer review is a one off meeting led by the school with the child or young person and their parents/carers and other involved professionals where the child or young person’s views, interests aspirations, current educational, health and care needs, outcomes and ongoing educational, health and care provision requirements are discussed.

This is done as part of the annual review that would be held to review the statement and this would normally be undertaken within 12 months of the previous annual review or within 6 months for a child under the age of 5 years. However, the local authority will write to schools to inform them when the transfer review should take place.

The local authority is responsible for organising the process for converting statements to plans and for agreeing a new EHC plan. However, the local authority will require the school to arrange and hold the transfer review.

Actions to be undertaken by the school are laid out below along with suggested scripts:

Preparing for the transfer review

* Prepare the transfer review report (see below)
* Explain the transfer review process to the child or young person (see appendix 2) and plan how they should present their views and take part in the meeting.
* Convene the transfer review and invite the following to attend with at least two weeks notice of the date of the transfer review:
  + the child or young person
  + the child’s or young person’s parents/carers
  + SENDIASS adviser or Independent Supporter if involved
  + any other person that the parents/carers would like to attend
  + relevant school staff
  + involved education, health and care professionals
  + the Connexions worker where appropriate
  + where the child or young person is moving to a new school or setting, relevant staff from that setting
  + a representative from the local authority’s Special Education Service (SES staff are likely to only attend certain reviews for specific casework reasons)
* Seek advice and information from everyone invited to the transfer review about the child or young person’s progress towards meeting the objectives specified in statement
* Where it is clear that the child’s or young person’s SEN have significantly changed from those identified in Part 2 of the statement (i.e. new and additional needs requiring new and additional provision), it will be important to request updated advice from the relevant professional(s).
* An alternative action, particularly where all or very little of the existing information about the child or young person’s SEN remains relevant or, for whatever reason, is highly contentious, is to request that the local authority undertakes a statutory EHC assessment.
* Circulate the transfer review report, any other advice, information and plans and the ‘Information about transfer review’ leaflet (see appendix 1) to everyone invited to the transfer review at least two weeks before the meeting.

Preparing the transfer review report

The transfer review report should be drawn up in sufficient time to allow for it to be circulated at least 2 weeks prior to the transfer review meeting.

A. The child’s or young person’s views, interests and aspirations

This is an opportunity for the child or young person to present their information to the transfer review. This could be done by the child or young person as part of a prepared presentation using a variety of media (eg, powerpoint, audio/visual recording, writing, pictures, artwork, etc) supported by an adult as required.

This section should contain information about what is important to the child or young person including their interests, achievements and strengths; their short term goals and longer term aspirations; as well as their views about things that are relevant to a consideration of their needs. This could include details about play, health, schooling, independence, friendships and future plans including:

* employment, learning and work
* friends, relationships and community opportunities
* independence and housing
* planning for good health

B. The child’s or young person’s special educational needs

This section should contain information about what the child or young person can and can’t currently do within each area of SEN identified in Part 2 of the statement:

* Communication and interaction
* Cognition and learning
* Social, emotional and mental health
* Sensory and/or physical

This should reflect their progress over the period since the last review towards the objectives in Part 3a of the statement. It is usually helpful to include appropriate data to report the child or young person’s progress within National Curriculum core subjects.

C. The child’s or young person’s health needs

D. The child’s or young person’s social care needs

These sections should only contain information about health and/or social care needs as identified in Part 5 of the statement (Non Educational Provision) and any updated information about health and/or social care needs provided by health and/or social care professionals.

E. The outcomes that are important for the child or young person

This section should contain outcomes that are important for the child or young person that relate to their identified educational, health and care needs as well as their views, interests and aspirations. The 3 key elements to writing good outcomes are:

* capturing what the child or young person needs to do in order to successfully progress to the next key stage or phase;
* worded in terms that are meaningful and relevant to the child or young person (ie, previously discussed and agreed with them);
* and are measurable.

For young people in Year 9 and above, outcomes must include a focus on what young people have said is important to and for them preparing for adulthood including:

* Education, learning and work (the learning outcome(s) to enable the young person to realise their aspirations for future choices for work)
* Friends, relationships and community opportunities (the outcomes to enable the young person to develop social skills, friendships and confidence for taking part in their local community)
* Independence and housing (the outcomes that represent appropriate independence skills and independent living for the young person)
* Planning for good health (the outcomes that enable the young person to manage their own health needs)

F. The special educational provision required by the child or young person

This section should contain a description of the special educational provision that the child or young person will need to achieve each of the outcomes that have been identified for them in the previous section (section E). This section should reflect the previous information about special educational provision in Part 3b of the statement where this is still relevant.

This should specify facilities and equipment, staffing arrangements and curriculum (including any appropriate modifications/exclusions to the National Curriculum along with alternative provision to maintain a balanced and broadly based curriculum).

There should be a special educational provision for each identified SEN and its related outcome. It should also be clear how the provision will enable each outcome to be achieved. Recommendations for provision should include planning for transition.

Special educational provision should be described with sufficient specificity to enable this to be quantified (ie, what, when, where, by whom, etc). However, it is inappropriate to recommend specific commercial programmes or interventions except where these are referred to as examples of the type of provision that is required (ie, ‘such as…’).

The final part of the meeting is to review the ongoing requirements for SEND transport where this has been agreed on SEND grounds. The meeting will need to provide a clear recommendation regarding this.

Children or young people with SEND will receive SEND transport where they live further than the statutory distance from their school (statutory distance is defined as 2 miles for a child under 8 years of age and 3 miles for a child aged 8 and older). Some children or young people with SEND who live within the statutory distance from their school will receive SEND transport based on SEND needs, ie:

* Long term severely restricted independent mobility due to physical disability or a medical condition resulting in severe persistent pain and/or extreme fatigue
* Long term restricted mobility due to a medical condition resulting in serious persistent health and safety risks
* Impairment resulting in severely restricted oral communication
* Severely restricted mobility due to a sensory impairment
* Cognitive abilities within the range associated with severe learning difficulties
* Severe behavioural emotional and/or social difficulties in comparison with other children of their age

(Please refer to Leicester City’s Home to School Transport Policy for children with SEN/Disability/Mobility Needs March 2010 for further information).

Where SEND transport has been agreed for an individual child or young person on SEND grounds, this discussion should plan for and review the outcomes from appropriate independence travel training where this has been arranged.

G. Health provision required by the child or young person

H. Social care provision required by the child or young person

These sections should describe the health and social care provision as described in Part 6 of the statement and any updated information regarding health and social care provision provided by health and/or social care professionals.

Health or social care provision which educates or trains a child or young person must be recorded under Special educational provision and Health provision or Social care provision as appropriate. An example of this might be speech and language therapy which is a Health provision but one which also educates or trains a child or young person. In this instance, speech and language therapy would need to be recorded under both Special educational provision and Health provision.

On the day of the transfer review

* Allow 1 ½ hours for the meeting
* Prepare and arrange the room in such a way to help the child or young person and the family to feel comfortable and so as to support their participation (e.g. display examples of the child’s or young person’s work, make refreshments available, etc.).
* Ensure that flipchart paper is posted around the room for the following headings:
  + Who is here
  + What we like and admire about NAME
  + Questions to answer / Issues to resolve
* Ensure that copies of the current statement of SEN is available along with the transfer review report and other advice, information and plans circulated as part of the transfer review.

Running the transfer review

**Welcome and introductions** (10 minutes)

* The facilitator welcomes everyone attending the transfer review and invites them to complete their details on the ‘Who is here’ sheet and to make a contribution to the ‘What we like and admire’ sheet which should be prominently displayed as flipchart pages upon entering the room.
* The facilitator begins the meeting by asking everyone to introduce themselves and to say who they are and their relationship to the child or young person.
* The facilitator should also introduce themselves and explain that their role is to make sure that the meeting runs smoothly and that the parents along with the child or young person are able to participate.
* The facilitator can then share what has been recorded on the ‘What we like and admire’ sheet as well as add any further contributions
* The facilitator explains the purpose of the meeting and introduces the ground rules:

*The purpose of the meeting is to discuss and agree wording that the LA can consider for converting NAME’s statement to a new EHC plan. This will be based on information about NAME’s current progress and the ongoing support that they require. To help us do this, the school have produced a transfer review report which you should have received prior to the meeting as a starting point for our discussions.*

*The transfer review report consists of the following sections:*

* *The child or young person’s views, interests and aspirations (to be presented at the meeting) and those of their parents/carers (to be completed at the meeting)*
* *The child/young person’s educational, health and care needs*
* *The outcomes that are important for the child/young person*
* *The educational, health and care provision that the child or young person will require to help them achieve their outcomes*
* *Placement (to be left blank at this stage)*
* *Personal budget (to be completed at the meeting)*

*We will discuss each section of the review report in turn. Where we all agree the wording then that stands as the agreed wording for that section. Where there is a difference of view about the wording and where this cannot be resolved then we will record on the transfer review report who is saying what and it is then the LA’s task to decide how to resolve any difference of views.*

*If we find that there is very little agreement or where the information is very contentious then one of the options available to us at the conclusion of this meeting is to ask the local authority to undertake an assessment of NAME’s education, health and care needs.*

*To help me facilitate this meeting, I would ask that we all observe the following ground rules:*

* + - *Everyone’s view is valuable*
    - *There is no such thing as a silly question*
    - *No jargon*
    - *Mobiles switched off or onto silent*
    - *Don’t worry about spelling mistakes*
    - *Don’t interrupt*
    - *5 minute rule*
    - *Respect confidentiality*

*If there are any questions to answer or issues to resolve then these can be recorded on the ‘Questions to answer or issues to resolve’ heading. We will return to these at the end of the meeting to make sure that these are appropriately actioned.*

*Please allow 1 ½ hours for the meeting. Before we start, does anybody have any questions?*

**Review of progress and co - production of the transfer review report** (60 minutes)

A. The child’s or young person’s views, interests and aspirations and those of their parents/carers

* The facilitator invites the child or young person to present their information about their views, interests and aspirations. This should be recorded in the transfer review report.
* The facilitator invites the parents/carers to contribute information about their views, interests and aspirations for their child or young person. This should be recorded in the transfer review report.

B. The child’s or young person’s special educational needs

* The facilitator invites the following to provide their views and information about the child’s or young person’s progress towards meeting the objectives specified in the statement:
* The child or young person
* The parents/carers
* School/ /setting staff
* Other professionals. This is the opportunity for professionals to present any reports that they have prepared for the transfer review.
* The facilitator should invite everyone in the meeting to read through section B of the transfer review report and along with on the information that has just been shared about the child or young person’s current progress, to discuss and agree this wording.
* Where this is not possible (using the 5 minute rule), alternative versions should be recorded making it clear which wording is supported by which individuals.

C. The child’s or young person’s health needs

D. The child’s or young person’s social care needs

E. The outcomes that are important for the child or young person

F. The special educational provision required by the child or young person

G. Health provision required by the child or young person

H. Social care provision required by the child or young person

* The facilitator should invite everyone in the meeting to read through the other sections of the transfer review report and discuss and agree the wording for each section.
* Where this is not possible (using the 5 minute rule), alternative versions should be recorded making it clear which wording is supported by which individuals.

I. The child’s or young person’s setting/school/college

* The facilitator should ensure that the existing school or setting is recorded under this heading. Where the child or young person is transferring to a different setting, school or college within the next 12 months, then this should be left blank.
* However, the preferences of the parents and young person for the next school or college should be recorded for the local authority to consider as part of the normal review process.
* Where there is a recommendation by professionals for a different or alternative school to the one preferred by parents, then this should be recorded along with the person(s) making this recommendation.

J. Any identified additional resources, including a personal budget

* A personal budget is an amount of money identified by the LA to deliver provision set out in an EHC plan where the parent or young person is involved in securing that provision. A personal budget is intended to support the child or young person achieve the outcomes specified in the EHC plan. Parents or the young person (over the age of 16) have a right to request a personal budget. The facilitator should ensure that any request for a personal budget made by the parents or young person is recorded under this heading.

Completing and checking the transfer review report

* Once each section of the transfer review report has been considered, the facilitator should check to ensure that everyone’s views on the wording has been accurately recorded.
* The facilitator should also ensure that each discrete education, health and care need has a corresponding outcome and provision

**Completing the implementation plan and concluding the meeting** (20 minutes)

* The final part of the meeting is to complete the implementation plan (appendix 3) to include short term targets, support and monitoring to enable the child or young person to achieve their outcomes.
* Where there was a previous implementation or action plan (from the previous review), this should be reviewed first and any incomplete actions addressed.
* The implementation plan for a young person in Year 9 and above must include a focus on good health, employment, learning and work, independent living and participation in society. This transition planning must include effective planning for young people moving from children’s to adult care and health services.
* The facilitator should then check the ‘Questions to answer / Issues to resolve’ heading and address any remaining points. Some of these may represent questions or issues that can’t be answered or resolved at the meeting. Where this is the case, identify, from those currently working with the family or young person, who should follow this up.
* The final action is to thank everyone for their participation and contribution to the transfer review and to explain the next steps:

*My final action is to thank everyone for their participation and contribution to the transfer review and to explain the next steps.*

*At the conclusion of this meeting, all the information will be collated into a transfer review report that will be sent to everyone invited to the meeting and to the local authority within 2 weeks.*

*The local authority will then consider this wording and the information about your child’s progress. The local authority will then decide whether:*

* *to issue an EHC plan based on the transfer review report*
* *to issue an EHC plan based on the transfer review report but with some changes*
* *to undertake an assessment of education, health and care needs*
* *not to issue an EHC plan*

*The local authority will contact you with its decision within 4 weeks of the transfer review. They will also provide you with details about independent information, advice and support to help you particularly if you don’t agree with the local authority’s decision.*

*Thank you again for taking part.*

Actions following the review

* The facilitator completes the transfer review record pro forma (appendix 3) and sends this along with the information, reports and plans circulated at the transfer review to the Special Education Service and everyone invited to the meeting within 2 weeks of the meeting.
* Arrangements are undertaken to action the implementation plan as agreed.

**Appendix 1**



**The Transfer Review - Information for parents/carers of children and**

**young people with statements of Special Educational Needs (SEN)**

**Introduction**

Following the introduction of the Children and Families Act 2014, statements of SEN are being replaced by Education, Health and Care (EHC) plans. This will be done over a 3 year period with those children or young people who are about to leave their current placement being prioritized first. Children or young people with statements will continue to have the same rights and support through their statement of SEN up to the point that this is replaced by an EHC plan.

Your child’s statement will be converted to a plan through a one off meeting called the transfer review as part of an assessment of their education, health and care needs. This is likely to happen as part of the annual review meeting that is held each year to review your child’s progress and to plan for their ongoing support. The school or setting that your child attends will write to you to inform you when a transfer review is going to be held for your child.

An EHC plan will provide better co-ordinated and outcome focused planning for children and young people supporting their transition to further education/training, employment, independent living and support up to the age of 25 years where they require this. An EHC plan also provides greater personalisation of support including the option of a personal budget.

Young people with a statement of SEN who are 18 years old will not require an EHC plan where they are leaving school and:

* not continuing with education or training
* going into paid employment
* going to university

Where this is the case, the young person’s statement will lapse at the end of their final year in school.

More information about EHC plans and local authority’s transition plan and timeline for converting statements to plans can be found on the Leicester City’s Local Offer website: <http://www.localofferleicester.org.uk/>

**Preparing for the transfer review**

The school or setting which your child attends will organise the meeting and will invite you and relevant professionals to attend in the normal way. You should receive a report (called the transfer review report) prepared by the school. This report should provide updated information about your child’s SEN and provision based on their current progress as well as reports by professionals prepared for the review. The transfer review report will be the document used by the local authority to determine whether your child requires an EHC plan. An important part of the transfer review will be discussing and agreeing the wording for this document.

Careful thought will be given to ensuring that your child is able to take part in the transfer review meeting and that they are able to present information about their views, interests and aspirations. It will also be helpful if you can take your child’s statement to the transfer review meeting.

The transfer review is led by an appropriate person from the school (called the facilitator) and should last no more than 1 ½ hours. The meeting will be run in such a way to ensure that you are able to join with the professionals in discussing and agreeing an accurate description of your child’s current needs and support..

Where, for whatever reason, it is not possible for everyone to agree the wording to describe your child’s needs or support, then the facilitator will record who is saying what. It will be the local authority’s task, in discussion with you, to decide how to resolve any difference of views.

An alternative action that is available to you, particularly where all or very little of the existing information about your child’s SEN remains relevant or, for whatever reason, is highly contentious, is to request that the local authority undertakes a statutory EHC assessment. You have the right to request this at any point. To do this, you will need to write a letter to the local authority (Special Education Service, Leicester City Council, 10 York Road, Leicester, LE1 5TS) or by email ([ses@leicester.gov.uk](mailto:ses@leicester.gov.uk)) requesting that the local authority undertakes a statutory EHC assessment for your child.

To help the meeting run smoothly, the facilitator will introduce a number of ground rules:

* Everyone’s view is valuable
* There is no such thing as a silly question
* No jargon
* Mobiles switched off or onto silent
* Don’t worry about spelling mistakes
* Don’t interrupt
* 5 minute rule
* Respect confidentiality

During the course of the meeting, if there are any questions or issues that can’t be resolved this will also be recorded and at the end of the meeting, the facilitator will plan how these should be addressed.

**What happens at the transfer review?**

The transfer review will start with a deliberately positive focus on things that everyone who knows your child likes and admires about them. It will then go on to hear about your child’s views, interests and aspirations as well as your views, interests and aspirations for them.

It will be important that the transfer review document captures this information and that this underpins the description of their needs and support.

Education, health and care needs

Next, the meeting will discuss information about your child’s progress towards the objectives laid out in their statement. You will be invited to give your views as will the school and other professionals. Using this information and the description of your child’s SEN in the statement, the facilitator will discuss and agree with you updated wording that describes your child’s current SEN. It will be important to describe what your child can and can’t do within each area of SEN.

Where your child has health and/or social care needs, this will be updated based on information from health and social care professionals.

Outcomes

Having updated your child’s education, health and care needs, the facilitator will then discuss and agree with you outcomes that will be important for your child to achieve in relation to their needs and which will also reflect their aspirations.

A good outcome should describe one of the key skills your child needs to achieve in order to successfully progress to the next key stage or phase of education. Where possible, they should also be meaningful and relevant to your child and should be worded in such a way as to enable you and others to judge whether they have been achieved or not.

For young people in Year 9 and above, outcomes must include a focus on what young people have said is important for them preparing for adulthood including:

* Education, learning and work (the learning outcome(s) to enable the young person to realise their aspirations for future choices for work)
* Friends, relationships and community opportunities (the outcomes to enable the young person to develop social skills, friendships and confidence for taking part in their local community)
* Independence and housing (the outcomes that represent appropriate independence skills and independent living for the young person)
* Planning for good health (the outcomes that enable the young person to manage their own health needs)

Education, health and care provision

Taking each outcome in turn (and using the information about the child or young person’s special educational provision as described in the statement where this is still relevant), the facilitator discusses and agrees with you wording for special educational provision that will enable the child or young person to achieve that outcome.

Where relevant, health and/or care provision is also discussed and agreed.

Placement

Where your child is transferring to another setting, you will be asked as to any preferences that you have for their next setting.

Personal budget

A personal budget is an amount of money identified by the local authority to deliver provision set out an EHC plan where the parent or young person is involved in securing that provision. A personal budget is intended to support the child or young person achieve the outcomes specified in the EHC plan. Parents or the young person (over the age of 16) have a right to request a personal budget.

Implementation plan

The final part of the meeting is to complete the implementation plan. This is the plan for the next 12 months and includes targets, support and monitoring to enable your child to achieve the outcomes (or steps towards achieving their outcomes) that have been identified. The plan may also contain other agreed actions for you and/or other professionals that are important for your child.

For a young person in Year 9 and above, the implementation plan must include a focus on good health, employment, learning and work, independent living and participation in society as well as effective planning for young people moving from children’s to adult care and health services.

At the conclusion of the meeting the facilitator should ensure that there are agreed actions to address any remaining questions or issues that have been raised.

**What will happen following the transfer review?**

The facilitator will complete a record of the transfer review meeting and this will be sent to you as well as the other professionals who attended the meeting and to the local authority. This will include the proposed wording for the EHC plan.

The local authority will then consider this wording and the information about your child’s progress. The local authority will then decide whether to:

* issue an EHC plan based on the suggested wording from the transfer review
* issue an EHC plan based on the suggested wording from the transfer review but with some changes
* to undertake an assessment of education, health and care needs
* not issue an EHC plan

The local authority will contact you with its decision within 4 weeks of the transfer review. They will also provide you with details about independent information, advice and support to help you particularly if you don’t agree with the local authority’s decision.

**Appendix 2**



**Your Transfer Review - Information for children young people**

This is a short information leaflet for adults to use with the child or young person in whatever way that would be most helpful to prepare them for their transfer review.

**Your Transfer Review**

What is a transfer review?

Every year your teachers meet with you and your parents to look at your work and how you are getting on at school and to plan for the coming year. For young people in Year 9 and above, this planning starts to look at further education, training and work as well as planning for independence and good health.

This meeting is called the Annual Review. This year your annual review meeting will be different. It will be called a transfer review.

This meeting will look at your progress and then write some new wording to describe your education, health and care needs. This wording will then be looked at by someone from the local authority. They will decide whether you require one of the new plans being written by the local authority. This new plan is a called an Education, Health and Care Plan. This is being introduced following a change in the law made by the government.

For more information about our new approaches, see [www.localofferleicester.org.uk](http://www.localofferleicester.org.uk)

How should you preparing for your transfer review?

Your teachers will talk with you about the meeting and agree with you the best way for you to take part.

They will also help you prepare a presentation about your views, interests and aspirations for the meeting.

What happens at a transfer review?

Your teachers with other professionals who know you and your parents will meet.

They will listen to your presentation about your views, interests and aspirations and then talk about your work and how you are getting on in school.

They will then discuss your education, health and care needs.

They will also agree some outcomes for you. Outcomes are what your teachers and parents would like you to be able to do in the future and to help you prepare for your next school, college or setting.

They will then talk about the help that you will need so that you can work towards these outcomes.

What happens after a transfer review?

After the transfer review, your school will send all the information about you to the local authority. Someone will look at this and decide whether you require an education, health and care plan. They will then write to your parents and let them know about its decision.

Your teachers will carry on giving you the help and support that you need to so that you can work towards your outcomes.

**Appendix 3**

|  |  |  |  |
| --- | --- | --- | --- |
| leicester CC logo**Record of the**  **Transfer Review** | | | |
| Child or young person’s name: | | | |
| Date of transfer review | | | |
| Current school/college/setting: | | | |
| Date of Birth | NC Year | | |
| Name(s) of Parents/Guardians | | | |
| Recommendations from the transfer review meeting (please tick one only): | | | |
| 1. The needs and provision described in the Statement continue to be appropriate  and can be converted to a Plan along with additional information about the  child/young person’s views, outcomes and a personal budget. | | | |
| 2. The school/college/setting remains appropriate but amendments are  recommended as part of the conversion of the Statement to a Plan | | | |
| 3. Is any change of school/college/setting anticipated:  a) Because the child or young person is approaching transfer to next phase  b) Because the child or young person’s needs have changed | | | |
| 4. It is recommended that the LA should undertake an assessment of education,  health and care needs | | | |
| 5. It is recommended that the LA should cease to maintain the Statement | | | |
| Signature of person chairing the meeting \_\_\_\_\_\_\_\_\_\_­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_­­­­­­  Please return to Special Education Service, Education and Children’s Services, Leicester City Council, York Road, Leicester, LE1 5TS and copy to all invited to the review meeting. | | | |
| **1. Who took part in the transfer review** | |  |  |
| **Name and designation** | | Attended Review Meeting  (YES/NO) | Written Report Submitted (YES/NO) |
|  | |  |  |

|  |
| --- |
| **Others invited and apologies received, if any** |
|  |

|  |
| --- |
| **Like and admires about** |
|  |

A transfer review is a once off meeting where a statement of Special Educational Needs (SEN) is converted into an Education, Health and Care (EHC) plan. This is done as part of the annual review of the statement. The new EHC plan is based on updated information about the child or young person’s education, health and care needs and provision as well as information about their views, interests and aspirations and those of their parents/carers for them. It should also contain outcomes for the child or young person and the appropriate information about personal budgets and educational placement.

**2. Review of progress and co-writing the Plan**

**2a The child or young person’s views, interests and aspirations and those**

**of their parents/carers.**

**2b The child or young person’s current special educational needs.**

**2c The child or young person’s health needs**

**2d The child or young person’s social care needs**

**2e The outcomes that are important for the child or young person**

**2f Special educational provision required by the child or young person**

**2g Health provision required by the child or young person**

**2h Social care provision required by the child or young person**

**2i The child or young person’s setting/school/college**

**2j Personal budget**

**2k Questions to answer / issues to resolve**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **3. Planning for EHC Plan outcomes identified for the child or young person (up to 14):** | | | | |
|  | **Long term outcomes (What are the long term outcomes from the C&YP’s EHC plan and where are we now?)** | **Annual targets (What will the C&YP be able to do in 12 months time?)** | **Support to achieve outcomes (What facilities, equipment, staffing/ curriculum arrangements, support from outside agencies and from family/community will the C&YP require to achieve this?)** | **Monitoring and review (How will the C&YP’s progress be monitored and reported?)** |
| 1 |  |  |  |  |
| 2 |  |  |  |  |
| 3 |  |  |  |  |
| 4 |  |  |  |  |
| 5 |  |  |  |  |
| 6 |  |  |  |  |
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| **Planning for any other actions agreed at the EHC plan review:** | | | | |

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| --- | --- | --- | --- | --- | --- | --- | --- |
| **3. Planning for EHC Plan outcomes identified for the young person: Preparing for Adulthood Phase (14+)** | | | | | | | |
| **NAME:**  name  **Year Group:**    **D.O.B:**    **SCHOOL:** | **LONG TERM OUTCOMES**  direction | **Targets – NEXT 12 MONTHS** | **WHAT SUPPORT I WILL NEED?**  support | **WHO WILL HELP ME?**  ideal%20person%20-%20trust1%20132 | **MONEY £**  money | **CHECKING**  **self dertermination** | **IMPORTANT MESSAGES ABOUT MY FUTURE** |
| The things that are important to me / the things I want to achieve for my future | The things I want to achieve before my next review | Who will help me?  This could be help in school, from others, equipment or other things | How?  The name of the person / people and their role | Any funding that I am entitled to, to support me with my goals | Who will check the actions agreed in my plan | We will tell people who provide future support and opportunities what I will need |
| **EDUCATION LEARNING AND WORK** |  |  |  |  |  |  |  |
| community life  **FRIENDS, RELATIONSHIPS & COMMUNITY OPPORTUNITIES** |  |  |  |  |  |  |  |
| **home**  **INDEPENDENCE AND HOUSING**  **PLANNING FOR GOOD HEALTH** |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| ANY OTHER ACTIONS WE AGREE TODAY | person**WHO WILL DO THIS** | | **targetWHAT** | | | * **BY WHEN** | |
|  | |  | | |  | |

**4. Review of SEND transport**

Children or young people with SEND will receive SEND transport where they live further than the statutory distance from their school (statutory distance is defined as 2 miles for a child under 8 years of age and 3 miles for a child aged 8 and older).

Some children or young people with SEND who live within the statutory distance from their school will receive SEND transport based on SEND needs, ie:

* Long term severely restricted independent mobility due to physical disability or a medical condition resulting in severe persistent pain and/or extreme fatigue
* Long term restricted mobility due to a medical condition resulting in serious persistent health and safety risks
* Impairment resulting in severely restricted oral communication
* Severely restricted mobility due to a sensory impairment
* Cognitive abilities within the range associated with severe learning difficulties
* Severe behavioural emotional and/or social difficulties in comparison with other children of their age

5a Does the child or young person receive SEND transport? YES/NO\*

5b Do they receive this on because they live further than the YES/NO\* statutory distance from school and/or

5c Do they receive this on based on SEND needs? YES/NO\*

5d Where the child or young person receives SEND transport YES/NO\* based on their SEND needs, do they continue to need this?

5c If yes, please provide information about their ongoing needs including relevant updated professional reports

5d Have they received independence travel training? YES/NO\*

5e What was the outcome of this for the child/young person’s independence?

\* Please delete that which does not apply