5 Board
ANNUAL REVIEW
Notes of Guidance

For Children with
SPECIAL
EDUCATIONAL NEEDS
# ANNUAL REVIEW

## CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>1</td>
</tr>
<tr>
<td>ANNUAL REVIEW FLOWCHART</td>
<td>2</td>
</tr>
<tr>
<td>1. What is an annual review?</td>
<td>3</td>
</tr>
<tr>
<td>2. The purpose of the annual review</td>
<td>3</td>
</tr>
<tr>
<td>3. Who carries out the review?</td>
<td>3</td>
</tr>
<tr>
<td>4. Summary of annual review process</td>
<td>4</td>
</tr>
<tr>
<td>5. Transfer age children</td>
<td>5</td>
</tr>
<tr>
<td>6. 14+ reviews and transition plans</td>
<td>5</td>
</tr>
<tr>
<td>7. Pupils transferring to Further Education</td>
<td>7</td>
</tr>
<tr>
<td>8. The annual review documentation</td>
<td>7</td>
</tr>
</tbody>
</table>

## APPENDICES

<table>
<thead>
<tr>
<th>Appendix</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Annual Review - Form AR</td>
<td>8</td>
</tr>
<tr>
<td>2. Transfer to Primary/Post Primary – Form TR</td>
<td>10</td>
</tr>
<tr>
<td>3. Transition (14+) – Form TP</td>
<td>11</td>
</tr>
<tr>
<td>4. Form for Parental Contribution</td>
<td>12</td>
</tr>
<tr>
<td>5. Form for Young Person’s Contribution</td>
<td>13</td>
</tr>
</tbody>
</table>
INTRODUCTION

These Notes of Guidance have been drawn up by a 5 Board Working Group.

The Working Group was set up in February 2004. Its composition included personnel from each board’s special education section; a SENCO; representatives from the Department of Education, and a number of principal’s of special schools across the 5 boards.

The remit for the group was to examine the annual review process and to consider ways in which the perceived bureaucratic burden on schools associated with the current annual review process could be reduced.

The Working Group have concluded their task and will make representations to the Department of Education in relation to change in the legislation governing the annual review process.

In the meantime, the Working Group have agreed these guidelines and standardised documentation and it is intended that all 5 Boards will use this documentation from September 2005.

These Notes of Guidance are not therefore intended to be a formal interpretation of the Statutory Legislation governing the education of children and young persons on whom the Board maintains a Statement of Special Educational Needs. Neither do they provide the detail contained in the Code of Practice on the Identification and Assessment of Special Educational Needs.

The Notes of Guidance have been devised to identify for schools the main elements of the Annual Review Process.

Boards of Governors and Principals should ensure that they have copies of The Code of Practice and any other relevant legislation in school for reference purposes.

In this document the term 'parents' should be interpreted to mean 'those with parental responsibility' as defined under the Children (Northern Ireland) Order 1995 (DE Circular 1999/17)
Annual Review Flowchart
resulting in completion of the Annual Review form AR

Board writes to principal

Principal requests contributions from parents and relevant professionals.

Principal sends out invitations, circulates contributions received.

The review meeting takes place

Invitations sent to:
parent(s)
most appropriate teacher(s)
any person specified by the Board
any other appropriate person

The meeting considers progress towards objectives and targets of the statement and Education Plan; application of NI curriculum; statement - maintained amended or ceased.

Principal sends report to the Board and to those invited to the meeting

Annual Review form AR is returned to the Board with the following attachments:
- a current education plan indicating the pupil’s targets
- school report
and where appropriate:
Transfer form TR
Transition (14+) Plan TP
Other contributions, Reports and any additional information may also be attached.

Board reviews statement and advises relevant parties of the outcome
1 WHAT IS AN ANNUAL REVIEW?

Article 19 of the Education (Northern Ireland) Order 1996 requires that any child or young person who is the subject of a Statement of Special Educational Needs, whether attending a special or mainstream school, must be reviewed annually, to make sure that the needs of the child or young person are still being met and to consider the appropriateness of the placement. Annual Reviews should be seen as part of the process of continuous assessment of the child's progress.

2 THE PURPOSE OF THE ANNUAL REVIEW

The purpose of an annual review is:
- assess the child’s progress towards meeting the objectives specified in the statement, and the targets agreed, following the making of the statement;
- to review the special provision made for the child, including placement;
- to consider the appropriateness of maintaining the statement;

3 WHO CARRIES OUT THE REVIEW?

*The school undertakes the Review on behalf of the Board.*

The Principal may delegate any prescribed duties to a teacher of the school. In these circumstances the Principal must be satisfied that this teacher is fully aware of the statutory requirements and has a copy of:-
- the 5 Boards’ Notes of Guidance;
- 'The Code of Practice on the Identification and Assessment of Special Educational Needs'.
4 SUMMARY OF ANNUAL REVIEW PROCESS

4.1. The Board will notify the Principal in writing of those children in his/her school for whom an Annual Review must be undertaken and the date by which the report should be submitted to the Board.

4.2. The Principal writes to parents and professional(s) asking for written contributions and giving notice of the date of the annual review meeting. Those invited to the meeting should include:
   - those with parental responsibility;
   - the class teacher or subject teachers (it may be that the last school report may be used for this purpose but all those involved in teaching the child should be given an opportunity to update their assessment if appropriate);
   - any other person specified by the Board or any other person the Principal considers appropriate.

4.3. Written contributions received should be forwarded to all those who contributed and all those invited to the meeting at least 2 weeks in advance of the meeting.

4.4. The Review meeting should normally take place in the school and should be chaired by the Principal or the teacher who has been designated to carry out the Review.

4.5. After the meeting, the Annual Review Form (AR) should be completed to reflect the issues discussed and the outcome of the meeting and should be forwarded to the Board.

4.6. Upon receipt of the Annual Review Form (AR), the Board will review the Statement and determine whether to maintain the Statement, amend the Statement or cease to maintain the Statement of Special Educational Needs.

4.7. The decision of the Board will be notified to those with parental responsibility and other relevant parties as soon as possible.

4.8. If the Board feels that the Annual Review is incomplete and/or appropriate documentation is omitted, for whatever reason, the review documents can be returned to the school for completion.
5 TRANSFER AGE CHILDREN

The Annual Review has particular significance as a child reaches the age to transfer to Primary or to Post-Primary education and requires careful planning.

In this instance the Annual Review form AR should be completed together with the Transfer to Primary/Post-Primary form TR

It is strongly recommended that more than one school preference is listed. The school should ensure that parents are aware that this is a preference and not a choice.

The Board has ultimate responsibility to place a child on whom it maintains a statement.

6 14+ REVIEWS AND TRANSITION PLANS

6.1. For a child with a statement of special educational needs, the first Annual Review after he/she becomes 14 years of age is particularly important in preparing for the move into adult life.

6.2. The annual review process as outlined in Section 4 applies with the following additional requirements:
   - a representative of the Health and Social Services Trust must be invited to the meeting (the Senior Clinical Medical Officer/Consultant Paediatrician will act as a point of contact); and
   - the careers service must be contacted and invited to that meeting and all subsequent meetings.
   - The views of the young person should be sought and he/she should be encouraged to actively participate and consider, with appropriate guidance, a wide range of options during the transition phase.

6.3. After the meeting a Review report should be finalised to reflect the issues discussed and the outcome of the meeting.
The Transition Plan is prepared after the 14+ Review meeting and the documentation is submitted to the Board.

The Board will affirm the Transition Plan forwarded from the school.

The Board will review the Statement and determine if the Statement requires amendment.

6.4 The Annual Review process should be used to update and assess progress towards the achievement of the Transition Plan.

6.5 Disabled Persons (NI) Act (1989)

There is a statutory duty to seek an opinion from the Health and Social Services Trust (HSST) as to whether a child with a Statement is a disabled person and may require services from a HSST after leaving school. In some cases the Board has already been advised that the child has been registered and will make that known to the school. This should be confirmed by the Senior Clinical Medical Officer/Consultant Paediatrician/Designated Medical Officer. It is important that if, at any time, after the first Review after a child attains 14 years, the child's circumstances change, a further opinion is sought from the HSST.

If it has been agreed that a child is disabled, the legislation requires that the HSST must be advised of the expected school leaving age between 8 and 12 months in advance of that date, if it is known. The Board will be responsible for notifying the HSST. However, the normal school leaving ages and dates will be assumed unless the school notifies the Board otherwise.
7. PUPILS TRANSFERRING TO FURTHER EDUCATION

Statements of Special Educational Needs are not maintained for young persons in Institutes of Further and Higher Education or for young persons attending training courses. The school should explain to the young persons who are moving to Further and Higher Education, and their parents, the potential benefits of passing relevant information to the College or other provider.

8. THE ANNUAL REVIEW DOCUMENTATION (see Appendices)

The Annual Review form AR (Appendix 1) should be completed for EVERY Annual Review. The type of Annual Review should be indicated by ticking the ‘Type of Review’ box on form AR i.e. Annual Review, Transfer Review, or Transition (14+ Review).

Additional forms required due to Transfer, Form TR (Appendix 2), or Transition Plan (14+), Form TP (Appendix 3), are also enclosed and should be attached to Form AR as appropriate.

Pupil and Parent contributions should be sought using Appendices 4 and 5 and submitted with the Annual Review form.

All written contributions received should be attached to the Form AR and their inclusion indicated in the section ‘Annual Review Meeting’ by ticking the appropriate box.

Persons invited, their designation, attendance, and whether or not a contribution was received should be recorded in the ‘Annual Review Meeting’ box of the Annual Review form AR.

The Pupil’s current Education Plan and School Report together with other Reports/Contributions should be attached and their presence indicated in the ‘Reports/Contributions Attached’ box of AR.
APPENDICES
Before completing this form please read carefully the Notes of Guidance

Special Educational Needs Annual Review 2006/07

Pupil Details

<table>
<thead>
<tr>
<th>Pupil's Name</th>
<th>School</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date of Birth</td>
<td>Pupil Ref No</td>
</tr>
<tr>
<td>Address</td>
<td>Date of Admission</td>
</tr>
<tr>
<td>Year Group</td>
<td>Class Size</td>
</tr>
</tbody>
</table>

Person(s) with Parental Responsibility

<table>
<thead>
<tr>
<th>Name</th>
<th>Address if different from above</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone No</td>
<td></td>
</tr>
</tbody>
</table>

Annual Review meeting

<table>
<thead>
<tr>
<th>Persons invited</th>
<th>Designation</th>
<th>Contribution</th>
<th>Attended</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td></td>
<td>Requested</td>
<td>Received</td>
</tr>
</tbody>
</table>

Please tick as appropriate

Type of Review

- Annual Review
- Transfer Review
- Transition (14+) Review

Action

- Other Change of Placement
- Amendment to Statement
- Cease Statement
- School Leaver

Current Provision

Please Tick  Give details of each provision e.g. time

| Specialist Equipment (specify) |
| Additional Teaching |
| Classroom Assistance |
| Other Adult Assistance (specify) |
| Outreach/Peripatetic support |
| Therapy |

Disability Access requirements
Review of the Statement of Special Educational Needs

1. Do the objectives of the Statement remain appropriate? Yes □ No □ If not, please state the reasons.

2. Does the pupil have access to the full N.I. Curriculum without exemptions or modifications? Yes □ No □ If not, please give details:

3. Are there any significant new needs that are not recorded on the Statement? Yes □ No □ If yes, please attach appropriate documentary evidence.

4. Has the pupil made satisfactory progress towards achieving the targets set out in his/her Education Plan during the past year? Yes □ No □ If not, please give details:

5. Is there any reason why the provision should be amended to meet the pupil's needs? Yes □ No □ If yes, please attach appropriate documentary evidence.

6. Is the present placement appropriate to meet the pupil's Special Educational Needs? Yes □ No □ If not, please provide details.

7. Should the Statement continue to be maintained? Yes □ No □ If not, please state the reasons.

Reports/Contributions Attached

☐ Current Education Plan  ☐ Medical Report
☐ School Report  ☐ Speech & Language Report
☐ Transfer Form  ☐ Physiotherapy Report
☐ Transition (14+) Plan  ☐ Occupational Therapy Report
☐ Educational Psychology Report  ☐ Social Services Report
☐ Outreach/Peripatetic Report(s)  ☐ Other

Are all those attending Review in agreement? Yes □ No □ If not, please attach details.

Principal ___________________________ Date ___/___/____

(reverse of form)
Transfer/Change of Placement

Before completing this form please read carefully the Notes of Guidance

Ref No

Pupil’s Name

Date of Birth

Section A

School Preferences

1st

2nd

3rd

4th

Section B

Parents’ Remarks – including reasons for choice, special circumstances (if any)

Section C

I wish the Board to seek placement for my child in the above school(s) in order of preference listed above.

Signed

Date

Signed

Date

This form should be signed by all persons with parental responsibility.
Transition(14+) Plan

Before completing this form please read carefully the Notes of Guidance

Pupil Ref No  Pupil’s Name  Date of Birth

<table>
<thead>
<tr>
<th>Transition Needs</th>
<th>Action</th>
<th>Agencies Responsible</th>
</tr>
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<tbody>
<tr>
<td>Academic</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Career/Future</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health-Therapy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal/Family/Social</td>
<td></td>
<td></td>
</tr>
<tr>
<td>General Action</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

School  Signed  Date

Principal
These questions are intended to give us your thoughts about your child’s education. You do not have to answer them.

Child’s Name…………………………………Date of Birth……………………

1. Have there been any major changes which might have affected your child’s progress at school (e.g. medication, family circumstances)?

2. What do you think of the progress your child has made in the past year?

3. What progress would you like to see in the coming year?

4. Is there anything else you would like to discuss at the meeting?

I/We will/will not be able to attend the Annual Review meeting on…………………………

………………………………………………………………….at………………………………

Signed………………………………………………………………………………….

Date………………………………

Relationship to Child………………………………………………………………………………..

PLEASE RETURN THIS FORM TO THE PRINCIPAL AS SOON AS POSSIBLE

Thank you
Belfast Education and Library Board
Annual Review
Pupil Contribution

Name.............................................................................. Class ...............  

1. What do you do best in school?  

2. What do you find difficult in school?  

3. Do you have any problems or worries about school?  

4. What do you like doing outside school (e.g. clubs, hobbies, sports)?  

Signed .................................................................  
Date .........................................................