

Hints and Tips

For conducting EHC transfer reviews

Do:

- Complete Person Centred Plan prior to transfer review meeting. Focus on the key areas:
Me and my Family.
Things that are important to me.
What I like to do.
What I want to do in the future.
A PCP should be completed over a period of time and updated when necessary.
- Involve the child / young person and their families. Seek their views about their aspirations and the support they need to achieve them. Enable the child / young person to invite who they feel is important and how they want the meeting to be structured, refreshments, seating arrangements etc.
- Write outcomes and strategies that are linked to the child's or young person's primary and additional needs including learning styles. Give details of how each outcome will be monitored. Outcomes should be linked to aspirations.
- Review and update the current statement of SEN and strategies prior to / during the transfer review meeting. Unmet targets from previous annual review should form some outcomes.
- Provide evidence of action taken to date within the provider's existing resources and evidence that any progress has been made only as a result of additional and sustained input over a period of time. Qualify duration and number of times strategy will be used and by whom.
- Allow sufficient time for the transfer review meeting. Average time appears to be 90 minutes to be productive.
- Conduct the meeting in a person centred way – involve the child / young person and their families throughout the process.
- Identify independent supporters to the parents, child / young person. Families should be provided with impartial information and guidance and support.
- Familiarise self with all sections of the transfer review, request for assessment forms and the final EHC plan. Complete each section of the transfer review document thoroughly.

- Remember that the person identified as undertaking the action on the plan will be responsible for completing what they have agreed to do. Use job roles where applicable not personal names.
- Seek the views, opinions, reports from all agencies involved with the child / young person prior to the review. Professional agency reports should be submitted with a referral to assess.
- Encourage parents to complete a parental advice form if they cannot attend the review meeting so that their views are reflected within the EHCP. Disruption to families should be minimised. This includes avoiding multiple assessments and appointments.
- Seek advice and support from colleagues, independent supporters and the SEND Team.
- Share outcomes and strategies with staff – The EHC plan is a working document. Ensure the child / young person has access to their plan in a format that suits them.

Don't:

- Rush the process or send in incomplete information.
- Confuse strategies with outcomes. Think about does it change what is not working or build upon what is working? Does it take the child / young person closer to their aspirations? Do we know what is important to the child / young person about this issue? What is getting in the way?
- Guarantee EHCP will be in place until the child / young person is 25 years old. The plan can only be in place if there is evidence to support need and the child / young person is in fulltime education / training. (Higher Education is excluded from EHCP)
- Undersell the support and strategies that are already delivered and in place.