



Preparing for an Annual Review meeting

A simple guide to help you prepare, take part and feel confident.

An Annual Review of an EHC Plan is a chance to look at your child's or young person's Education, Health, and Care Plan (EHC Plan), celebrate progress, discuss any concerns or questions, and consider whether the plan or support may need to change.

Annual Reviews are held annually, except for children under 5, where reviews should take place every **6 months**.

The Annual Review is your chance to

Review needs (areas of difficulties), provision(support) and outcomes (what difference the support has made); check whether the EHC Plan remains accurate; share your child's or young person's views and aspirations (long-term goals); and recommend any changes needed.

Helpful questions to keep in mind for the meeting

What has gone well this year and does anything need to change?

The annual review should ensure that planning and support are centred around the child or young person and their aspirations for adulthood

Annual reviews should focus on your child's or young person and give them the chance to share their views, wishes and hopes for the future.

Quick preparation checklist

Preparation starts **2 weeks** before the meeting takes place, you **must** be sent written information and advice from any professional working with your child or young person. It's important you read through these reports and ensure you understand what is written and agree with the content.

If you have not been sent copies of the annual review paperwork, you can ask the nursery, school or college to send them or request the meeting is postponed, so you can have time to read all the information.

If you do not agree with the content of the reports, you can raise this directly with the professional who wrote it, prior to/or at the annual review meeting.

Before the meeting

- ☐ Check the date, time, place, purpose and who will attend.
- ☐ Ask for the agenda and written advice or reports in advance.



- ☐ Read all the Sections of the EHC Plan carefully, especially Sections B (Needs), E (Outcomes) and F (Special Educational Provision). Note any changes you would like to be made to the Plan and the evidence that supports these changes, such as professional reports, assessments, progress data or information from the school or college.
- ☐ Write down what is working well, what has changed and any concerns.
- ☐ Record your views and ask your child or young person for their views, wishes and aspirations.
- ☐ Think about whether any changes are needed to the plan, support or placement (if any).
- ☐ Prioritise the most important points you want discussed.
- ☐ Decide whether you would like someone to attend for support.
- ☐ Take a notebook to take down any notes.

Reading the EHC Plan before the meeting

- Does Section B clearly describe all current special educational needs?
- Do the outcomes in Section E remain appropriate and meaningful?
- Does Section F clearly specify (make clear) all the support needed to meet each need?
- Is all the provision in Section F being delivered?
- Is any wording unclear or vague, such as “access to” or “would benefit from”?
- Are there new reports, diagnoses, or changes in circumstances to include?
- What progress has been made towards the outcomes?
- Is transition planning needed for a move of class, setting, school, or college?

Children under 5

For a younger child, consider development across communication and language, physical development, and personal, social and emotional development, alongside their strengths, needs and progress.

- What has changed since the last review?
- Are the needs, outcomes, and provision still accurate?
- What do recent developmental checks or professional reports show?
- Is specialist advice needed?
- What support is needed for transition to nursery, reception, or another setting?
- How will parents continue to be involved in planning and reviewing support?

Year 9 onwards and Post-16 (Year 12: Preparing for Adulthood)

From **Year 9** onwards, the review should support preparation for adult life.

These reviews **must** include planning for adult life. Discussions should focus on:

- What the child/young person wants to achieve in the future.
- Their strengths, interests and abilities.
- What they would like to do after post-16 education or training.
- The support they need to help them reach their goals and become as independent as possible

And will be recorded under the headings below



- **Education, training, and employment:** What are your young person's goals and what experiences or support will help them achieve these goals?
- **Independent living:** What skills and support are needed for daily life and greater independence?
- **Friends, relationships, and community:** What will help the young person participate and build their social life?
- **Good health:** What support is needed to manage health and prepare for adult services where relevant?

During the meeting

- Ask everyone to introduce themselves and explain their role.
- Check that the relevant reports and the current EHC plan are available.
- Check who will complete the Annual Review report that will be sent to the EHC Co-ordinator in the LA's SEN team, following the annual review meeting.
- Make sure your child's or young person's views, wishes and aspirations are included.
- Work through needs, outcomes, and provision, and say clearly where you agree or disagree.
- Ask for plain-English explanations (without jargon/complicated language) of anything you do not understand.
- Make sure any recommended changes are written clearly.
- **Agree actions:** what will be done, who will do it and by when.
- Check what will happen next and when you should receive the report.
- Ask for a break if you need one.

Before you leave

- ☐ Have I said what I wanted to say?
- ☐ Are my questions answered?
- ☐ Are all recommended changes and disagreements recorded?
- ☐ Are the actions, responsible people and dates clear?
- ☐ Do I understand what happens next?

After the meeting

- You should receive a copy of the Annual Review report. Read it carefully and check it reflects the discussion, recommendations and yours and your child's/young person's views.
- The school or setting must send the completed Annual Review paperwork to the LA (EHC Co-ordinator)
- Contact the SENCo if anything is missing, unclear or inaccurate.
- Keep the report and your notes for your records.
- Within four weeks of the review meeting, the LA will decide whether to keep the EHC plan unchanged, amend (change) it or cease (end) it, and notify you and/or your young person of its decision.
- Read the decision letter carefully, including any information about your rights and next steps.

More information and templates to give your views read our page on [Annual Reviews](#) and [Annual Review information for children and young people](#)

Contact us:

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