



# **ANNUAL REVIEWS**

## **PARENT WORKSHOP**

Bexley Voice  
2026  
**Graham and Stacey**

# Welcome and Introductions

Please introduce yourselves :

- Your name
- Your Child's' age and gender
- When your next Annual Review Meeting is
- Is this your first Annual Review Meeting?
- One thing you want to take away from today



# Plan for the session

We will be looking at:

- The legislation around Annual Reviews
- What should happen and when
- Who could/should be involved
- Suggestions to help you with your preparation

Is there anything else you need us to cover?



# Objectives

By the end of this session we will have:

- Provided you with information about the Annual Review, the process, what to expect and how to prepare
- Provided you with information on Annual Reviews at key transition stages
- Helped you make the AR a useful and positive meeting by providing information that will help you prepare
- Ensured you know where to find the information relevant to your family circumstances and need
- Anything else?



# The Legal Framework for Annual Reviews

- Children and Families Act 2014 (Code of Practice 2015)
- The Post-16 Skills Plan 2016
- Equality Act 2010
- Mental Capacity Act 2005 (amended 2019)
- The Children Act 1989
- The Care Act 2014



# Children and Families Act 2014

- The EHCP Annual Review is a statutory process – a way of reviewing needs, provision and outcomes in an EHC Plan
- It considers progress and determines if there need to be changes
- Its purpose is to ensure that the EHC Plan remains relevant and supports the child/young person to make progress towards their agreed outcomes and **must** consider whether outcomes and supporting targets remain appropriate
- The Local Authority **must** work with schools to ensure this happens within 12 months of the date of issue and then annually (every 6 months for children under 5yrs)



# Children and Families Act 2014 Cont.

- The Annual Review **must** be undertaken in partnership with the child and their parent or the young person, and **must** take account of their views, wishes and feelings, including the right to request a personal budget
- Important to remember the Annual Review is a process not an event – all the required steps need to be carried out for the AR to be completed



# Common Complaints regarding ARs.

- Late notification of meeting dates to parent (professionals)
- Delay in issuing amended plan following the review
- Annual review meeting late
- Lack of CYP input
- Anything else?

\*Annual Review Portal



# Timing of Annual Reviews.

- Where a child/young person is within 12 months of a transfer between phases of education the LA must review and amend, where necessary, their EHC Plan before **15 February** in the Calendar year of transfer
  - Transfer years include: Early Years to School
  - Infant to Junior
  - Primary to secondary
- For transfer from Secondary Education to a Post 16 provision, the EHC Plan must be completed by **31 March** in the Calendar year of transfer



# Who does what?

- Local Authority's responsibility to ensure the AR is carried out annually
- The Educational Setting will organise the AR Meeting – it is usually the Special Educational Needs Coordinator (SENCo) or Head Teacher who coordinate AR Meetings
- The Local Authority will organise the AR for those who are Home Educated
- Professionals across education, health and care **must** cooperate with LAs during reviews



# Starting the Process..

**At least 2 weeks before the meeting** invitations to attend the Annual Review **must** be sent to:

- Parent or young person
- Head of nursery, headteacher or principal
- Local authority officer (education)
- Health care professional
- Local authority officer (social care)
- Any other individuals relevant to the review

AR dates are often set the year before, so you should have more notice – you may want to flag up earlier if you need specific people to attend. This is also the case for new reports from professionals.



# Preparing and sharing information.

**At least 2 weeks before the meeting** information and advice must be obtained from all those invited and circulated to all those invited. This includes parent carers and young people.

This information and advice should:

- Provide details about the child or young person's progress and their access to teaching and learning
- Consider whether the current special educational provision is effective
- Consider whether the current health and social care provision is effective

If you do not receive this information 2 weeks before the AR meeting – contact the meeting coordinator. You may need to ask for a postponement, to ensure the process is carried out properly.



# Preparing and sharing information cont.

The information and advice from young people or professionals can make suggestions about changes that should be made to the EHC plan – especially important where amendments are sought.

Schools will work with the child/young person to gather their views on progress and the outcomes they are working towards.

Parent carers are sent a form to complete – it doesn't always ask the questions you want to answer.

Consider using a Working/Not working sheet to jot down how you (and your young person where appropriate) feel things are going.



# AR Meetings should be planned...

.....at a time to enable all who need to be there to attend.

The following people must be invited to attend the AR:

- The child or young person
- The child or young person's parents or carers (inc a supporter)
- A school representative (one or more of: SENCo, class teacher, LSA)

The following should also be invited if they are involved with the child/young person:

- Health professionals
- Local Authority Social Care representative
- Others involved (e.g early intervention key workers, youth offending team, outreach teachers etc)
- Local Authority SEN Case Officer, if required



# AR Meetings should be planned...

- where the meeting will get the best outcome
- to enable parents and the child or young person to have their say –does the environment encourage them to do this?
- to include enough space, appropriate IT/equipment to ensure all can participate
- to incorporate any support parents and YP may need and ensure they know how they can be supported?



# How can you plan for the AR Meeting?

- Check in with the school/Educational setting to find out what is being done to obtain your child/young persons input for the meeting
- Ask if they will be attending all or part of the meeting and how they will be contributing their views wishes and aspirations
- You may wish to review Part A of the plan with your child
- Review the current EHCP, recent professional reports etc
- Check to see if Part B (needs) are still accurate and if Part E outcomes are still appropriate. Does the content of part F Provision meet all the needs outlined in Part B?
- Yr 9 and above – consider the areas of preparing for adulthood – [see BVDOC 8 in Parent Transition Planner](#)



# How can you plan for the AR Meeting? 2

You can review all the documentation shared in advance of the meeting and use the checklists we created for our Transition Planner – available on the BV website – to formulate your thoughts.

- [BVDOC 2 – checklist from 4 weeks pre meeting](#)
- [BVDOC 3 - things to take with you to the meeting](#)
- [BVDOC 4 – jot down the questions you have on this form – you can then note response/action in the meeting](#)
- [BVDOC 8 – Helpful form to complete for ARs from Year 9 – you should be asked about these things in the AR and it is helpful to have given it some thought in advance](#)

If you prepare well, you will be able to positively contribute to the meeting, ensure you ask questions and be able to keep track of actions agreed.



# How can you plan for the AR Meeting? 3

If you or your young person would like to see changes to the EHC Plan provision (what the school put in place to support towards outcomes) you should:

- Make it known to the school/educational setting and SEN Case Officer know before the meeting – give as much notice as possible
- Identify any professionals, providing key information to inform this change, to ensure they are invited asap
- Gather and share as much evidence/advice as possible



# BREAK



# The Annual Review meeting

- Often, professionals invited are unable to attend due to other commitments, which can be disappointing
- If you really need a health professional or case officer to attend, ensure they are made aware of the date and time as soon as possible
- If they are unable to attend, they can provide a report to be shared
- You should know who will be attending the meeting and who is sending a report when you are sent the meeting papers – at least 2 weeks before the meeting



# The Annual Review meeting 2

The structure of each AR Meeting will vary, but all should include:

- Introductions
- Clarification of the purpose of the meeting
- Confirmation of reports received
- Confirmation of parental and CYP views
- Review of Progress against the outcomes in the EHC Plan
- Any requests for changes to the plan based on professional advice
- Planning the school based targets for the year ahead/actions
- Summary and Recommendations from the Annual Review



# The Annual Review meeting 3

Together you will:

- Consider the child or young person's progress towards the outcomes and whether they are still appropriate
- From Yr 9 consider what provision is required to help the young person prepare for adulthood and independence
- Review any targets set by the education setting and set new targets for the year and, where appropriate, agree new outcomes
- Take account of the views, feelings and wishes of the child, young person and parent, including their right to a personal budget
- Review any arrangements for direct payments (SC or just EHCP?)

Remember you are an important and equal participant in the review process and at the review meeting. Ask your questions and contribute where you feel able.



# Things to do during the AR meeting

- Take everything you will need – see [BVDOC 3](#) – this may include a person to support you and or your child
- Refer to your notes/lists
- Write down responses and actions to your questions (legibly) and include timescales/deadlines –see [BVDOC 4](#)
- Jot down useful names of professionals – get their role and contact details at the meeting if you are able
- Jot down your own follow up actions – use [BVDOC 7](#)



# After the Annual Review Meeting

As soon as possible following the meeting, ensure you follow up on your actions noted and record calls etc.

**Within 2 weeks of the AR meeting** the LA or the headteacher/principal **must** send a written report to all invitees setting out:

- Recommendations on any amendments to be made to the EHC plan
- Any difference between those recommendations and the recommendations of others attending the meeting –this is important for parents to see easily
- All info. and advice obtained about the child or young person

If something is incorrect or missing – contact your SEN Case Officer as soon as possible.

# After the Annual Review Meeting 2.

You may want to contact others who had actions if their deadline has passed.

**Within 4 weeks of the AR meeting** the local authority must decide whether to:

1. Maintain the EHC plan in its current form
2. Amend the EHC plan
3. Cease to maintain the EHC plan

If the LA decides to keep the EHC plan the same, or cease to maintain it, it **must** *send a notice of the decision* and with it provide:

- information about the availability of disagreement resolution services and information about SEND for Children and Young People
- the parent with notice of their right to appeal to the Tribunal and the time limits for doing so



# After the Annual Review Meeting 3.

If the decision is to amend the EHC plan, the LA **must, without delay**:

- send a copy of the EHC plan to the parent or young person showing the proposed amendments and any evidence that supports the amendment
- inform the parent or young person of their rights to make representations about the content of the EHC plan and to request a particular school or institution
- give at least 15 calendar days for the parent or young person to comment and make representations on the proposed changes



# After the Annual Review Meeting .

The local authority **must**:

- issue the amended EHC plan within 8 weeks of the original amendment notice

**or**

- notify the young person or parent within the same timescale of the decision not to make amendments



# Further information on Annual Reviews.

- The SEND code of Practice:0-25yrs (2015) contains more detailed information about Annual Reviews.  
[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/398815/SEND\\_Code\\_of\\_Practice\\_January\\_2015.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/398815/SEND_Code_of_Practice_January_2015.pdf)
- The Special Educational Need and Disability Regulations 2014  
<https://www.legislation.gov.uk/uksi/2014/1530/contents/made>
- Bexley Voice My Guide to Annual Reviews  
<https://bexleyvoice.org.uk/assets/documents/annual-review>  
<https://www.senexpertsolicitors.co.uk/site/news/plugging-the-gap-on-the-never-ending-annual-review-cycle>



# Further information on Annual Reviews.

- IASS Annual Reviews of EHCPs – Preparing for an Annual Review

<https://www.bexleyiass.co.uk/wp-content/uploads/2021/10/Bexley-IASS-Preparing-for-an-Education-Health-and-Care-EHC-Plan-Annual-Review.pdf>

- IPSEA – Annual Review checklist

<https://www.ipsea.org.uk/Handlers/Download.ashx?IDMF=48f807b4-d92b-4f84-aa2d-2c0c1fa204ee>

- Contact – National Charity supporting families of children with Special Educational Needs and Disabilities

<https://contact.org.uk/>



# What Next?

- Did we cover everything?
- Any questions?
- Please complete the feedback form – we will shape future workshops with your feedback.
- We really hope you have found it useful

Bexley Voice Parent Carer  
Feedback Form

