

The Annual Review Checklist

Take this into your child's Annual Review meeting to check the plan is still "fit for purpose".

Child's name: _____ School/Setting: _____

Date of meeting: _____ Attending: _____

Before the meeting (prep)

- I've read the current plan (including outcomes + provision)
- I've listed what's working and what isn't (at home + school)
- I've brought evidence (reports, emails, logs, examples of work, notes)
- I've written down my top 3 priorities for this review

Priorities: 1) _____ 2) _____ 3) _____

Progress + outcomes

- Are outcomes still relevant to my child's needs right now?
- Are outcomes specific and measurable (not vague)?
- What progress has been made — and what evidence supports that?
- What outcomes are not being met — and why?
- Do any outcomes need updating, replacing, or adding?

Notes: _____

Provision (support actually being delivered)

- What support is currently in place (daily/weekly)?
- Is it specific and quantified (how often, how long, who delivers it)?
- Has any provision been missed or reduced? (If yes: why?)
- Does staff have the right training/knowledge to deliver it?
- Is support happening consistently across lessons/times of day?

Notes: _____

Needs + changes

- Have my child's needs changed since the last review?
- Are there any new concerns (attendance, anxiety, behaviour, sensory, fatigue)?
- Do we need updated assessments (e.g., EP, SALT, OT, medical)?
- Are recommendations from professionals being followed in practice?

Notes: _____

Placement + "fit for purpose" check

- Is the placement meeting need (academically, socially, emotionally, sensory)?
- Are reasonable adjustments in place and working?
- What's the plan if things are not working?
- Are staff clear on triggers, support strategies, and what helps?

Notes: _____

Health / therapy / wider support

- Is therapy input up to date and included in the plan (where needed)?
- Is advice from SALT/OT/CAMHS/paediatrics reflected in daily support?
- Are there clear targets and responsibilities for therapy programmes?

Notes: _____

Parent + child voice

- Has my child's view been captured meaningfully (in a way that suits them)?
- Are my views recorded accurately?
- Have disagreements been noted clearly (if needed)?

Notes: _____

Actions + next steps (leave with clarity)

- What will be changed/updated after this meeting?
- Who is responsible for each action?
- What are the deadlines?
- When will I receive the updated paperwork?
- When is the next review/check-in?

Action list: 1) _____ Owner: _____ Due: _____ 2) _____ Owner: _____ Due:

3) _____ Owner: _____ Due: _____

My follow-up checklist

- I've asked for a copy of the notes/minutes
- I know when the updated paperwork will be issued
- I've confirmed who to contact if support isn't happening
- I've written down what was agreed (and by whom)

Tip: If you are told something will happen later, ask: **"Who will do it, by when, and how will it be recorded?"**