

Five agendas: annual review, initial IEP, re-evaluation review, amendment, transition. A plain-language parent copy, before / during / after checklists with a date column, a sign-in and roles page, and a filled example. Fillable PDF.

[illegible]

Three Checklists

Which Agenda for Which Meeting

Five meetings, five agendas. Pick the page once, type the header, and the order column is yours to renumber.

IF THE MEETING IS	USE	WHERE
The yearly meeting that reviews the plan and writes the next one	Annual Review Agenda	Page 5
The first meeting after an evaluation, when there is no plan yet	Initial IEP Agenda	Page 6
The meeting where the team hears new assessment results and decides what changes	Re-Evaluation Review Agenda	Page 7
A change to one part of the plan between annual meetings	Amendment / Addendum Meeting Agenda	Page 8
A secondary student whose meeting is about life after high school	Transition-Focused Agenda	Page 9
Any of the five, in the family's hands before and during the meeting	Parent Copy of the Agenda	Page 10

What this file does not include

There is no agenda here for a disciplinary meeting or any meeting that follows a suspension or a removal. Those run on your district's procedure and its own forms, and a generic agenda is the wrong paper to bring. Nothing on these pages is a legal document; the signature page, the notice of rights and the consent forms are the district's.

The three checklists and the sign-in

- ☐ **Before** (page 11): twenty tasks with an owner and a done date; the notice rule is a blank you fill in.
- ☐ **During** (page 12): sixteen things the facilitator ticks as they happen.
- ☐ **After** (page 13): fourteen tasks with a due date and a done date.
- ☐ **Sign-in and roles** (page 14): who was there, for how much of it, and what was decided.

The 3-2-1 rule, for the last three days

DAYS OUT	CONFIRM	CALL
3 Three days before , stop preparing and start confirming. The draft is what it is; the room, the people and the copies are what go wrong.	2 Two things to confirm: that everyone the meeting cannot run without is still coming, and who covers their class; and that the family has the parent copy and knows the room.	1 One person to call: the family. A call, not an email. Ask whether anything belongs on the agenda that is not there, and add it before you print.

Annual Review Agenda

The yearly meeting. Twelve items in the order most teams take them; the family speaks before any staff report, and the decisions are read back before anyone signs.

STUDENT

DATE / TIME / LENGTH

LOCATION OR LINK

FACILITATOR

ORDER	AGENDA ITEM	TIME	LEADER	NOTES / DECIDED
	Welcome, introductions, purpose of today Names and roles around the table; what this meeting is for			
	Family input first Their concerns, priorities and questions, before any staff report			
	Student input In person, on paper, or read aloud by an adult			
	Progress on the current goals Met, partly met, not met, with the data sheet on the table			
	Present levels: strengths What the student does well, in specifics			
	Present levels: needs Where the data says the plan has to do more			
	Proposed goals for the coming year Each one read aloud; the family asked whether it matters to them			
	Services and where they happen What, how often, where, by whom			
	Accommodations and modifications What the adult does, not a category name			
	Testing and assessment participation Which assessments, with what supports			
	Other sections that apply Transition, behavior, extended year, transportation: only as they apply			
	Decisions read back, next steps, signatures Who does what by when; the district's signature page			

Parking lot: raised today, not decided, each with an owner and a date

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Before you print: the times, added up, against the meeting length

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Parent Copy of the Agenda

The same meeting in plain words, for the family's hands before the meeting and at the table. Wide margins on purpose; they will write on it.

MEETING FOR

DATE AND TIME

WHERE

This is the plan for the meeting, in plain words. Nothing is decided before you arrive, and you can ask for a break, ask for any word to be explained, and ask for time to read anything before you sign it. Bring this page.

WHAT WE WILL TALK ABOUT		MY NOTES
1	Hellos, and who everyone is Every person says their name and what they do with your child	
2	What you want us to know You go first. What is going well, what is worrying you, what you hope for	
3	What your child says In their own words, in the room or read out for them	
4	How the current goals went With the numbers, not just a feeling	
5	What your child does well, and what is still hard In specifics, from the people who see it	
6	The goals we are proposing for next year You can ask for any of them to change	
7	The help your child gets, and where What, how often, where, and who does it	
8	Changes to how work and tests are done What the adults will do differently	
9	Anything else that applies to your child We will say which parts, and skip the rest	
10	What we decided, and what happens next Read back before anyone signs; you get a copy of everything	

Questions I want to ask

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WHO I AM BRINGING, IF ANYONE

THE BEST WAY TO REACH ME BEFORE THE MEETING

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Before the Meeting Checklist

Twenty tasks, each with an owner and a done date. No dates are printed here: your district's notice rule gets a blank, and the rest is task order.

STUDENT

MEETING TYPE / AGENDA PAGE

MEETING DATE

TASK	OWNER	DONE (DATE)
☐ Confirm the meeting type and pick the agenda page that fits it (page 3)		
☐ Confirm the date, time and room with the family before anything is printed		
☐ Send the meeting notice by the date your district's rule requires: _____		
☐ Log the date the notice went out and how it went		
☐ Send the parent copy of the agenda (page 10) home with the notice		
☐ Send the parent and student input forms home with a return date		
☐ Ask each teacher and provider for their input, with a return date		
☐ Arrange an interpreter or translated copies if the family needs them		
☐ Pull the progress data for every current goal		
☐ Collect the work samples that show what the data says		
☐ Write the draft; label every page DRAFT		
☐ Type the agenda: items in order, a time and a leader for each		
☐ Add up the times and make them fit the meeting length		
☐ Confirm every team member can attend, and who covers their class		
☐ Confirm the room, the seating and the technology or the link		
☐ Print the agenda, the sign-in page (14), the notes page and the draft for the table		
☐ Put the district's signature page and notice of rights in the folder		
☐ Chase any input form that has not come back		
☐ Three days out, run the 3-2-1 rule (page 3): two things confirmed, the family called		
☐ Put the after-meeting checklist (page 13) in the folder so it is there when the meeting ends		

Your district's notice rule, and any other local rule that changes this list

MEETING

Meeting Sign-In and Roles

Who was in the room, in what role, for how much of it. A working record for your own file, with the decisions written on the same page.

STUDENT

DATE AND TIME

MEETING TYPE / AGENDA
PAGE

FACILITATOR

Working record only. Your district’s signature page is the official attendance record. This page is for your own file: who was in the room, in what role, for how much of the meeting, and what was decided while they were there.

NAME	ROLE	ATTENDED: FULL / PART (WRITE THE TIMES)	INITIALS

Decisions made (one per line; what was decided, not what was discussed)

EXAMPLE

Annual Review for Jonah, Sixth Grade, Filled In

Jonah, his family and every adult here are invented. The times add up to the length written at the top, and the before-meeting checklist is exactly half done.

STUDENT	DATE / TIME / LENGTH	LOCATION OR LINK	FACILITATOR
Jonah R., grade 6	Oct 14, 2:30, 60 minutes	Room 12	Ms. Okafor

ORDER	AGENDA ITEM (PAGE 5)	MIN	LEADER	NOTES / DECIDED
1	Welcome, introductions, purpose of today	3	Ms. Okafor	Six at the table
2	Family input first	6	Mr. Reyes (dad)	Wants the pull-out moved
3	Student input	4	Jonah	Read his own page
4	Progress on the current goals	8	Mr. Lin (ELA)	Reading met; writing partly
5	Present levels: strengths	5	Ms. Okafor	Math; explains work to peers
6	Present levels: needs	5	Ms. Okafor	Writing stamina; long words
7	Proposed goals for the coming year	9	Ms. Okafor	Dad: goal 2 names a book length
8	Services and where they happen	6	Ms. Patel (SLP)	Speech to 2:15; keeps math
9	Accommodations and modifications	4	Mr. Lin	Speech-to-text for drafts
10	Testing and assessment participation	3	Ms. Okafor	Same supports as classwork
11	Other sections that apply	3	Ms. Okafor	None this year
12	Decisions read back, next steps, signatures	4	Ms. Okafor	Four next steps; signed
–	Total planned	60	–	Meeting length 60; ended 3:28

NO.	TASK (PAGE 11)	DONE
☒ 1	Agenda page picked	Sep 18
☒ 2	Date and room confirmed	Sep 19
☒ 3	Notice sent	Sep 22
☒ 4	Notice logged	Sep 22
☒ 5	Parent copy sent	Sep 22
☒ 6	Input forms out	Sep 22
☒ 7	Teacher input asked	Sep 23
☒ 8	Interpreter arranged	Sep 19
☒ 9	Progress data pulled	Oct 3
☐ 10	Work samples collected	–

NO.	TASK (PAGE 11)	DONE
☐ 11	Draft written	–
☐ 12	Agenda typed	–
☐ 13	Times add up	–
☐ 14	Attendance confirmed	–
☐ 15	Room confirmed	–
☐ 16	Table copies printed	–
☐ 17	District forms in folder	–
☒ 18	Input forms chased	Oct 6
☐ 19	3-2-1 done	–
☐ 20	After list in folder	–

What to notice

The twelve times add up to 60, the length in the header; item 7 (proposed goals) got the most minutes because the family had the most to say there. Ten of the twenty before-meeting tasks are done and dated, ten days out; the ten that are not belong to the last week. The notes column holds what was decided, not what was discussed.