

IEP MEETING AGENDA & CHECKLIST

The annual review agenda with a time, a leader and a notes column per item, a plain-language parent copy, a before-the-meeting checklist, a during-the-meeting checklist for the facilitator, and a sign-in and roles page. Print and go.

AGENDA 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 / DECISION
	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 Has quality 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 What assessments, with what supports			
	Other sections that apply Transition, behavior, extended year, transportation only as			

FAMILY 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 Hello, 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 work it	
6 The goals we are proposing for next year	You can ask for any of them to be changed	
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 what you want, and you will say what you need	
10 What we decided, and what happens next	Read back before anyone signs, you get a copy of everything	
Questions I want to ask		

CHECKLIST 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 that the annual review agenda (page 4) is the one that fits it		
☐ 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 5) 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		
☐ Write 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 (8), the notes page and the draft for the table		
☐ Put the district's signature page and notice of rights in the folder		

CHECKLIST During the Meeting Checklist

For the facilitator. Sixteen things that make a meeting feel fair and end on time, ticked as they happen.

STUDENT	MEETING DATE	FACILITATOR
TASK	NOTES	
☐ Welcome: everyone introduced by name and role, the family first		
☐ Purpose of the meeting stated in one sentence		
☐ How the meeting will run: the agenda, the time, questions welcome at any point		
☐ The district's notice of rights offered and explained in plain words		
☐ Family input first, before any staff report		
☐ Student input heard, or read aloud for them		
☐ Each item opened, kept to its time, closed with what was decided		
☐ Data shown, not described: the sheet on the table		
☐ Every proposed goal read aloud, and the family asked about it		
☐ Jargon caught and translated on the spot		
☐ Disagreements written down as said, with what happens next		
☐ Parking lot items given an owner and a date		
☐ Decisions read back before anyone signs		
☐ Sign-in page (8) completed: anyone who left early noted with the time		
☐ Next steps read aloud: who does what by when		

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

IEP MEETING How to Use These Five Pages

Ninety seconds. Which page is for which moment, what the columns and the marks mean, and the 3-2-1 rule for the last three days before the meeting.

Which page is for which moment	USE	PAGE
The yearly meeting, in the order most teams take it, a time, a leader and a notes column per item	Annual Review Agenda	4
In the family's hands before the meeting and at the table, in plain words	Parent Copy of the Agenda	5
The weeks before the meeting: the input forms, the data, the draft, the room	Before the Meeting Checklist	6
At the table, for the facilitator: what makes it feel fair and end on time	During the Meeting Checklist	7
Who was in the room, in what role, for how much of it, and what was decided	Sign-In and Roles	8

- Write the agenda first: a time and a leader beside each of the twelve items on page 4, then add up the times against the meeting length before you print. The order column is blank on purpose: number the items the way your team takes them.
- Send the parent copy (page 5) home with the notice, then work down the before-meeting checklist (page 6): every task has an owner and a done date, and your district's notice rule gets the blank line, because no date is printed on these pages.
- At the table, the facilitator holds page 7 and ticks as it happens: the family speaks before any staff report, and the decisions are read back before anyone signs. Who was there, and what was decided, goes on page 8 while everyone is still in the room.

The columns on the agenda and the checklist, and the marks

Order blank: you number it

Time a few characters: 5, 10, or 2-40

Leader the person who opens the item

Notes / decided what was decided, not what was discussed

Tick box ticked as it happens, not afterward

Attended: full / part the times, for anyone who left early

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

Three days before, stop preparing and start confirming: the draft is what it is, and the room, the people and the copies are what go wrong. 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

FREE

9 Pages

5 Sheets

Print & Go

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

WHO I AM BRINGING, IF ANYONE

THE BEST WAY TO REACH ME BEFORE THE MEETING

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)