

IEP MEETING PREP PACK

Parent input form, agenda, notes, follow-up letter and the checklists around them. Type it once, reuse it for every student.

BEFORE Parent and Family Input Form

Send this home two to three weeks before the meeting, with a return date. What comes back is the most useful page in the whole file.

STUDENT _____ PLEASE RETURN BY _____

Nobody knows your child the way you do. The team writes a better plan when it starts from what you tell us here. Every question is optional, and anything you write will be read aloud or summarised at the meeting if you would like it to be.

What is your child good at, and what do they love?
At home, with friends, on weekends. The things that do not show up on a report card.

What is working at school this year?

What is worrying you?

What works at home that we might not know about?
Routines, rewards, ways of explaining things, warning signs of a hard day.

DURING Meeting Agenda

The required components, in the order they are usually taken. Put a planned time beside each as a ninety-minute meeting does not spend an hour on item four.

STUDENT _____ DATE / TIME / ROOM _____ FACILITATOR _____

ITEM	PLANNED TIME	WHO LEADS / NOTES
1 Welcome and introductions Names and roles, the purpose of today's meeting		
2 Rights and procedural safeguards Offered in plain language; the notice handed over		
3 Family and student input Read the input forms first — before the staff reports		
4 Present levels Strengths, then data. Then needs. Teachers and providers report		
5 Progress on current goals Met, not met, or partly met — with the numbers		
6 Proposed goals Each one read aloud; the family asked whether it matters to them		
7 Services, placement and accommodations What, how much, where, by whom		
8 Testing and assessment participation Which assessments, with what accommodations		
9 Transition, behaviour or other required sections As they relate to this student		
10 Questions, disagreements and the parking lot Anything unresolved gets an answer and a date		
11 Next steps and signatures Who does what by when; the district's signature page		

DURING Meeting Notes

Built around decisions and action items, not narrative. If a sentence does not say who does what by when, it probably belongs in the parking lot box.

STUDENT _____ DATE _____ NOTES TAKEN BY _____

Family concerns and priorities raised
In their words where you can. This box is read first when anyone reports the file.

Decisions made
One per line. What was decided, not what was discussed.

ACTION ITEM	OWNER	BY WHEN

BEFORE Meeting Prep Countdown

Work backward from the meeting date. Fill in the target date for each row from the timeline your district requires, then tick them off.

STUDENT _____ MEETING TYPE _____ MEETING DATE _____

ITEM	TARGET DATE	DONE
Confirm the meeting date and the deadline your district requires for it		
Send the invitation to the family; log the date it went		
Send the parent and student input forms home with a return date		
Hand the teacher and provider input form to every adult who works with the student		
Request an interpreter or translated documents if the family needs them		
Pull the progress-monitoring data for every current goal		

ITEM	TARGET DATE	DONE
Collect the input forms; chase the ones that have not come back		
Write the draft: present levels first, from the data, then goals, then services		
Run the Draft Review Checklist on page 9		
Confirm every required team member can attend; arrange coverage for the teachers		

AFTER Follow-Up Summary for the Family

Goes home within the week, before the finalized IEP does. Plain language, one page, what changed and what happens next.

DEAR _____ DATE _____

Thank you for meeting with us on _____. Here is a short summary of what we talked about, and what happens next. The finalized IEP will follow separately; this letter is not that document, it is the plain-language version of it.

What we heard from you

What changed, and why
Goals, services, accommodations, placement. One line each, in everyday words.

What happens next, and when

EXAMPLE Agenda and Notes — Filled In

The agenda and notes pages, completed for an invented student. This is the level of detail that makes the notes useful three months later.

STUDENT Marcus T. DATE March 4, 10:00, Room 14 NOTES TAKEN BY R. Doyle

Agenda, with the planned times that were actually kept
1 Introductions (3 min) 2 Rights, notice handed over (4) 3 Family input read aloud first — grandmother present (8) 4 Present levels: Ms. Alvarez, speech (12) 5 Goal progress with the data sheets on the table (10) 6 Proposed goals (12) 7 Services and accommodations (10) 8 Testing (5) 9 Questions and parking lot (8) 10 Next steps (5) Finished at 12:20.

Family concerns and priorities raised
Grandmother: "He comes home saying he is stupid." Wants him reading well enough to read to his cousin by summer. Worried that the reading pull-out makes him miss the start of math, which he likes.

Decisions made
Reading goal rewritten from "improve decoding" to CVCVCe words in connected text, 8 of 10, weekly trial sheet. —
Speech moved from 2-20 to 3-15 min so it no longer overlaps the start of math. — "Extended time" replaced with "full period, then finish at the back table after lunch." — He will not be asked to read aloud to the class, written into accommodations, not left as a verbal agreement.

ACTION ITEM	OWNER	BY WHEN
Send new accommodations page to all three gen-ed teachers	R. Doyle	Mar 6
Reschedule speech; confirm with Ms. Alvarez	J. Park (SLP)	Mar 8
Follow-up call about reading pull-out	R. Doyle	Mar 9

Ninety seconds of reading that will save you an email. Please read it before you decide something is broken.

- 1 Open this file in a PDF reader**, not in a web browser preview pane and not in a photo viewer. Adobe Acrobat Reader is free and is the one that behaves best. Preview on a Mac works. Most browsers can fill the fields but some will not save them, which is where nearly every “it did not save” email comes from.
- 2 Click any dotted rule or shaded box and start typing.** If a field is there, the cursor will change when you hover over it. Press **Tab** to move to the next field and **Shift+Tab** to go back.
- 3 Use Save As, once per student.** Save a separate copy named for each student — *Meeting-M-Torres.pdf* — rather than typing over the same file. The original stays blank and you can print a fresh one any time.
- 4 The forms that go home can be printed blank.** The parent and student input forms are meant to be handwritten by the family; print those and send them, and type up the rest.
- 5 Print exactly as you always would.** What you typed prints with the page. Choose *Actual size* or *100%* rather than *Fit to page* so the margins stay where they were designed to be.

What this file is

A fillable PDF. The text fields are built into the document itself, so it works offline, needs no account, no login and no subscription, and looks the same on every machine that opens it.

What this file is not

It is not a Google Slides deck, a Google Doc, or a PowerPoint file, and it does not become one. You can type in it and print it; you cannot drag the boxes around or restyle the page. I would rather say so here than have you find out after you download it.

If something does not work

The text disappears when I close it. The file was opened in something that fills fields but does not save them — usually a browser tab. Download the file to your computer, open it in Acrobat Reader, and use Save As.

My typing is tiny, or huge. The larger boxes size the text automatically to fit what you have written, so a long entry shrinks. That is deliberate — it is what stops a paragraph from spilling off the page.

I cannot find a field on a page. The terms page, this page, the talking-points page and the filled-in example on page 19 are reference pages with nothing to fill in. Every other page has fields.

Anything else — use the **Ask a Question** tab on the product page. I answer quickly, I will fix it, and the update is free.

Parent and Family Input Form

Send this home two to three weeks before the meeting, with a return date. What comes back is the most useful page in the whole file.

STUDENT

PLEASE RETURN BY

Nobody knows your child the way you do. The team writes a better plan when it starts from what you tell us here. Every question is optional, and anything you write will be read aloud or summarized at the meeting if you would like it to be.

What is your child good at, and what do they love?

At home, with friends, on weekends. The things that do not show up on a report card.

What is working at school this year?

What is worrying you?

What works at home that we might not know about?

Routines, rewards, ways of explaining things, warning signs of a hard day.

What do you most want your child to be able to do a year from now?

Questions you want answered at the meeting

Anything else we should know

Changes at home, health, transport, who else should be invited, whether you need an interpreter.

Meeting Agenda

The required components, in the order they are usually taken. Put a planned time beside each so a ninety-minute meeting does not spend an hour on item two.

STUDENT

DATE / TIME / ROOM

FACILITATOR

ITEM		PLANNED TIME	WHO LEADS / NOTES
1	Welcome and introductions Names and roles; the purpose of today's meeting		
2	Rights and procedural safeguards Offered in plain language; the notice handed over		
3	Family and student input Read the input forms first — before the staff reports		
4	Present levels Strengths, then data, then needs. Teachers and providers report		
5	Progress on current goals Met, not met, or partly met — with the numbers		
6	Proposed goals Each one read aloud; the family asked whether it matters to them		
7	Services, placement and accommodations What, how much, where, by whom		
8	Testing and assessment participation Which assessments, with what accommodations		
9	Transition, behavior or other required sections As they apply to this student		
10	Questions, disagreements and the parking lot Anything unresolved gets an owner and a date		
11	Next steps and signatures Who does what by when; the district's signature page		

Built around decisions and action items, not narrative. If a sentence does not say who does what by when, it probably belongs in the parking lot box.

STUDENT

DATE

NOTES TAKEN BY

Family concerns and priorities raised

In their words where you can. This box is read first when anyone reopens the file.

Decisions made

One per line. What was decided, not what was discussed.

ACTION ITEM

OWNER

BY WHEN

Disagreements and how they were left

Who disagreed, about what, and what the next step is.

Parking lot

Raised but not resolved today. Each gets an owner and a date before the meeting ends.

EXAMPLE

Agenda and Notes — Filled In

The agenda and notes pages, completed for an invented student. This is the level of detail that makes the notes useful three months later.

STUDENT

Marcus T.

DATE

March 4, 10:00, Room 14

NOTES TAKEN BY

R. Doyle

Agenda, with the planned times that were actually kept

1 Introductions (3 min) · 2 Rights, notice handed over (4) · 3 Family input read aloud first — grandmother present (8) · 4 Present levels: Ms. Alvarez, speech (12) · 5 Goal progress with the data sheets on the table (10) · 6 Proposed goals (12) · 7 Services and accommodations (10) · 8 Testing (5) · 9 Questions and parking lot (8) · 10 Next steps (5). Finished at 11:20.

Family concerns and priorities raised

Grandmother: “He comes home saying he is stupid.” Wants him reading well enough to read to his cousin by summer. Worried that the reading pull-out makes him miss the start of math, which he likes.

Decisions made

Reading goal rewritten from “improve decoding” to CVC/CVCe words in connected text, 8 of 10, weekly trial sheet. — Speech moved from 2×20 to 3×15 min so it no longer overlaps the start of math. — “Extended time” replaced with “full period, then finish at the back table after lunch”. — He will not be asked to read aloud to the class; written into accommodations, not left as a verbal agreement.

ACTION ITEM	OWNER	BY WHEN
Send new accommodations page to all three gen-ed teachers	R. Doyle	Mar 6
Reschedule speech; confirm with Ms. Alvarez	J. Park (SLP)	Mar 8
Set up weekly CVC trial sheet, baseline 4/10	R. Doyle	Mar 7
Plain-language summary home, Spanish copy for grandmother	R. Doyle	Mar 9

Disagreements and how they were left

None on the plan. Grandmother asked whether a reading tutor could be provided; explained that is outside the IEP, gave her the district’s tutoring referral form, and noted it here so it is not lost.

Parking lot

Whether to add a self-advocacy goal for next year. Owner: R. Doyle, to raise at the fall check-in. Marcus to be asked what he thinks first.