

Editable templates for IEP meetings and classroom conferences. Two versions with prep sheets, agendas, discussion notes, action items, and family follow-up. Fillable PDF.

EXAMPLE

One Conference, Filled In

An invited student and family, Marcus and his mother, filled completely across the IEP prep, concerns, action items, and follow-up pages — so you can see how one real conversation turns into one finished page.

From the Prep Sheet (page 7) — Invented student Marcus, grade 4

Strength notes: grade-level text fluently when he has previewed it first. **Goal discussed:** Multi-step word problems. **Accommodation in place:** Extended time on tests — family reports he still rushes at home, so this is today's main question.

From Concerns and Goals Discussion (page 9)

Goal: Multi-step word problems. **What the team sees:** Solves one-step problems independently; multi-step problems need a prompt to re-read the question. **What family shared:** Marcus says math homework "takes forever" some nights. **What will change:** Add a visual checklist for multi-step problems; family will work homework for two weeks and share what they notice.

From Action Items and Decisions (page 10)

Decision: Teacher add a visual checklist for multi-step problems. **Who:** Classroom teacher. **When:** Starting next week. **Decision:** Family times two weeks of math homework and shares notes at the next check-in. **When:** Two weeks from today.

From the Family Follow-Up Letter (page 11) — the same decisions, in family-facing words

"Marcus reads grade-level text well once he has previewed it, and he can solve one-step math problems on his own. The team is adding a visual checklist to help with multi-step problems starting next week. Could you help Marcus for the next two weeks and let us know what you notice? We will check back in two weeks."

Why this works out

The letter home names only what the team actually decided on the Action Items page: the checklist and the two-week homework timing. It does not introduce a new decision or drop one — every sentence in the letter

BRIGHT PATH SPEED

How to Use These Forms

Five situations, two form sets. Find your situation in the left column, write the page numbers on your calendar, and you are ready.

IF YOU	USE	PAGES
I am running a formal IEP or IFSP meeting with the family and team	IEP Meeting forms, pages 7–11	Pages 7–11
I am holding a regular classroom conference with a parent or guardian	General Education Conference forms, pages 12–16	Pages 12–16
I need to send a quick update home without a full meeting	Any version's follow-up letter; the form is the same	Page 11 or 16
I want to plan what to say before the meeting starts	The Prep sheet for your meeting type	Page 7 or 12
The meeting went long and I did not get to everything	The follow-up letter; finish the conversation there	Page 11 or 16

What these forms are not

Not a script. Not a form your school must use. Not a list of what the law requires. The format your district uses for conferences, any legally required elements in your state, and any special sections your team always covers should go on blank lines in these forms. This file is the working paper behind your conference process, not the final word.

These are templates. Edit them. Change the headers. Change the sections. Make them match your team's own conference routine.

The rule every blank on every page follows

- ☐ Every blank is filled on purpose or left blank on purpose. There is no right answer. The right answer is the answer for this student and this family.
- ☐ Nothing on this form decides anything on its own. The parent's words stay the parent's own words. Your observation stays your observation. Nobody becomes a label from these forms.
- ☐ A filled page is a student record the moment it is written. Keep it with your case files, not on a desk, and follow your district's own records policy and FERPA guidance.

How to print and use these forms

Download and open in Acrobat Reader (free), or in any PDF reader. Type the student and family names once on the prep sheet; the names carry forward to every other page. Print a copy for your folder and send a copy home to the family.

Or print blank pages and write by hand. Both work.

A printable binder cover and four divider tabs — one for each of the IEP forms, the General Education forms, the Filled Example, and a blank tab for your own notes.

BINDER COVER

Conference Forms

Parent Teacher Conferences

School year: _____

Teacher / Case Manager: _____

DIVIDER TABS

TAB 1: IEP MEETING FORMS

Pages 7-11 -- prep, agenda, concerns, action items, family letter

TAB 2: GENERAL EDUCATION FORMS

Pages 12-16 -- prep, agenda, concerns, next steps, family note

TAB 3: FILLED EXAMPLE

Page 17 -- a completed conference to compare your own packet against

TAB 4: YOUR OWN NOTES

A blank tab -- add district forms, sign-in sheets, or anything else your team uses

MEETING LABELS

Print this page, cut the labels below, and stick one on the front of each student's conference packet so one meeting's forms never mix with the next.

MEETING 1

Student: _____
Date: _____

MEETING 2

Student: _____
Date: _____

MEETING 3

Student: _____
Date: _____

MEETING 4

Student: _____
Date: _____

MEETING 5

Student: _____
Date: _____

MEETING 6

Student: _____
Date: _____

IEP

Conference Prep – IEP Meeting

Before the meeting: student strengths, progress on current goals, accommodations in place, and the changes the team discussed last meeting.

STUDENT	DATE OF BIRTH	GRADE	CONFERENCE DATE
PARENT/GUARDIAN NAMES	OTHER ATTENDEES	IEP DATE	

STUDENT STRENGTH OR SKILL	CURRENT PROGRESS (DATA, OBSERVATION, OR FAMILY INPUT)	WHERE IT SHOWS UP

Current IEP goals being discussed today (copy from the IEP)

Accommodations in place and how the family says they are working

IEP

Action Items and Decisions – IEP Meeting

Everything decided in the meeting, who will do it, and the deadline.

STUDENT

CONFERENCE DATE

PREPARED BY

DECISION OR ACTION ITEM	WHO WILL DO IT	WHEN / DEADLINE	DONE?

Follow-up check-in and communication plan

Next meeting or check-in date:

How will we communicate before then?

(EMAIL, CALL, NOTE HOME, TEXT)

What to follow up on:

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Why this checks out

The letter home names only what the team actually decided on the Action Items page: the checklist and the two-week homework timing. It does not introduce a new decision or drop one — every sentence in the letter traces back to a line on an earlier page. That is the test for your own filled-in packet too: before you send the Family Follow-Up page home, read it back against your own Action Items page and confirm every sentence has a line it came from.

Using this example with your own packet

Copy this shape, not these words: one strength, one goal, one data point from the team, one thing the family shared, one decision with an owner and a date. A packet this short is easier for a family to read at home than a long narrative, and it is easier for you to confirm at the next meeting — did the checklist happen, did the two weeks of timing happen, what did they show.