

IEP Planning Guide

Your Complete Roadmap to Successful IEP Meetings

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☒ Pre-Meeting Preparation

Overview

Thorough preparation is the foundation of a successful IEP meeting. Taking time to organize documents, clarify goals, and coordinate with your team ensures you can advocate effectively for your child's needs.

☒ Document Gathering

Essential Documents Checklist:

- ☐ Current IEP (if applicable)
- ☐ Recent evaluation reports (psychological, speech, OT, PT)
- ☐ Progress reports from current school year
- ☐ Medical reports relevant to education
- ☐ Work samples showing strengths and challenges
- ☐ Behavior logs or communication logs
- ☐ Previous standardized test results

☒ **Tip:** Create a dedicated binder with tabs for each document type. Bring copies to share with team members who may not have them.

☒ Team Communication

Two Weeks Before Meeting:

- ☐ Request meeting agenda in writing
- ☐ Submit parent concerns letter
- ☐ Request draft IEP goals for review
- ☐ Confirm all team members attending

One Week Before Meeting:

- ☐ Request interpreter if needed
- ☐ Arrange for advocate or support person
- ☐ Send reminder email with your priorities
- ☐ Prepare questions list

☒ **Important:** You have the right to reschedule if key team members cannot attend or if you need more time to prepare.

☒ Goal Preparation

Strategic Planning Process:

1. Review Current Performance

- Analyze progress on existing goals
- Identify areas of growth
- Note continuing challenges

2. Set Priority Areas

- List top 3-5 focus areas
- Consider academic AND functional skills
- Include social-emotional development

3. Research Best Practices

- Evidence-based interventions
- Successful strategies from other settings

- Input from private providers

▮ **Success Indicator:** Goals should be SMART - Specific, Measurable, Achievable, Relevant, and Time-bound.

▮ During the Meeting

Meeting Participation Strategies

▮ Opening Statement Framework

"Thank you all for being here today. I'd like to start by sharing [child's name]'s recent successes: [specific examples]. Our priorities for this year are [top 3 priorities]. I look forward to collaborating on how to best support these goals."

▮ Active Listening Techniques

Effective Participation:

- Take detailed notes using meeting template
- Ask for clarification: *"Can you explain what that would look like in practice?"*
- Request specific examples: *"How would this support be implemented daily?"*
- Pause discussions if needed: *"I need a moment to process this information"*

▮ **Tip:** Bring a trusted friend to take notes so you can focus on participating fully in discussions.

▮ Advocacy Points Checklist

Topic	Key Questions	Notes
Services	What specific services will be provided?	Frequency, duration, location
Goals	How will progress be measured?	Data collection methods
Placement	What are all placement options?	LRE considerations
Accommodations	How will these be implemented?	Across all settings

▮ Goal-Setting Templates

Academic Goal Template

By [DATE], when given [CONDITION/MATERIALS], [STUDENT] will [SPECIFIC MEASURABLE BEHAVIOR] with [% ACCURACY] in [# OF TRIALS] as measured by [ASSESSMENT METHOD].

Example:

By May 2025, when given a grade-level reading passage, Sarah will identify the main idea and two supporting details with 80% accuracy in 4 out of 5 trials as measured by weekly comprehension checks.

Behavioral Goal Template

By [DATE], [STUDENT] will [DESIRED BEHAVIOR] in [SETTING] for [DURATION/FREQUENCY] as measured by [DATA COLLECTION METHOD].

Example:

By May 2025, James will use coping strategies to manage frustration during challenging tasks for 15 minutes without requiring adult intervention in 4 out of 5 opportunities as documented by daily behavior logs.

Social/Communication Goal Template

By [DATE], during [ACTIVITY/SETTING], [STUDENT] will [COMMUNICATION SKILL] with [LEVEL OF SUPPORT] in [FREQUENCY] as documented by [MEASUREMENT].

📌 **Success Indicator:** Each goal should directly address identified needs from evaluations and include parent input.

📌 Follow-Up Strategies

📌 Timeline for Action

🔗 Immediate Actions (Within 48 hours)

- ☐ Review and organize meeting notes
- ☐ Send thank you email to team
- ☐ Request copy of finalized IEP
- ☐ Document any disagreements in writing
- ☐ Schedule follow-up meetings if needed

📌 Monthly Monitoring

- ☐ Review progress on goals
- ☐ Communicate with service providers
- ☐ Document concerns or successes
- ☐ Request informal progress updates
- ☐ Update home support strategies

📌 Quarterly Review

- ☐ Analyze formal progress data
- ☐ Request team meeting if concerns arise
- ☐ Celebrate achievements with child
- ☐ Adjust home reinforcement
- ☐ Prepare for next IEP review

🚩 **Red Flag:** If you're not seeing progress after a full quarter, request an IEP team meeting to discuss modifications.

⚖️ Rights and Protections

Your Legal Rights Include

Participation Rights:

- 📌 Meaningful participation in all meetings
- 📌 Access to all educational records
- 📌 Bring anyone you choose to meetings
- 📌 Record meetings (check state laws)

Due Process Rights:

- 📌 Prior written notice for any changes
- 📌 Independent evaluation at public expense (if disagreeing)
- 📌 Mediation and due process hearings
- 📌 "Stay put" provision during disputes

📌 Red Flags to Address

⚠️ Warning Signs Requiring Action:

- Predetermined decisions before meeting
- Pressure to sign immediately
- Missing required team members
- Inadequate time for discussion
- Services based on availability rather than need
- Lack of individualization

📌 Resources and Support

Key Documents to Maintain

Document Type	Retention Period	Storage Tips
All IEPs	Permanent	Digital + physical copies
Evaluations	Until age 25+	Organized by date
Progress Reports	3 years minimum	Quarterly folders
Communications	2 years minimum	Email folders + logs

🌐 Support Network

National Resources:

- COPAA (Council of Parent Attorneys and Advocates) | 🌐 copaa.org
- Parent Information Centers | 🌐 Find your state center at parentcenterhub.org
- Understood.org | 🌐 understood.org | Free IEP resources

Legal Support:

- Disability Rights Network | 🌐 Find your state P&A
- Special Education Advocates | 🌐 copaa.org/find-an-advocate
- Legal Aid | 🌐 Contact your local legal aid society

💡 Tip: Join online support groups for parents in similar situations. The shared experiences and advice are invaluable.

🔍 Quick Reference Guide

IEP Meeting Checklist - Print & Bring

Before Meeting:

- ☐ Documents gathered and organized
- ☐ Questions written down
- ☐ Support person arranged
- ☐ Childcare confirmed

During Meeting:

- ☐ Share child's strengths
- ☐ State your priorities
- ☐ Ask clarifying questions
- ☐ Take detailed notes
- ☐ Confirm services in writing

After Meeting:

- ☐ Review IEP document
- ☐ Follow up in writing
- ☐ Share with providers
- ☐ Begin monitoring progress
- ☐ Calendar next review

Essential Phrases for Advocacy

🗣️ To Request Clarification:

- "I need help understanding..."
- "Can you show me where that's documented?"
- "What does that look like in practice?"

🗣️ To Express Disagreement:

- "I have concerns about..."
- "The data shows that..."
- "I'd like to propose an alternative..."

🗣️ To Request More:

- "Based on the evaluation..."
- "To meet this need..."

- *"The research supports..."*
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📌 **Remember:** You are your child's best advocate. Trust your instincts, stay organized, and don't hesitate to ask for support when you need it.