

IEP Meeting Prep Checklist

Purpose: *A clean, step-by-step checklist to help special educators feel organized and confident heading into IEP meetings.*

IEP Meeting Prep Checklist

Student Name: _____

Meeting Date & Time: _____

Case Manager: _____

1. Gather Essential Documents

- ☐ Draft IEP with updated goals and service grid
- ☐ Most recent evaluations and/or progress reports
- ☐ Student work samples or data
- ☐ Attendance and behavior records (if relevant)
- ☐ Progress monitoring graphs or notes

2. Review & Update Key Sections

- ☐ Present Levels of Academic Achievement & Functional Performance (PLAAFP)
- ☐ Strengths and needs (updated and specific)
- ☐ Accommodations and modifications
- ☐ Annual goals (aligned, measurable, and current)
- ☐ Service delivery grid (accurate and compliant)
- ☐ Transition plan (if age-appropriate)

3. Connect with Team Members

- ☐ Notify service providers and general ed teachers of meeting date
- ☐ Collect input or progress updates from all service providers
- ☐ Confirm who will attend (OT, PT, SLP, etc.)
- ☐ Check in with school counselor or behavior staff if needed
- ☐ Confirm interpreter if needed

4. Communicate with Family

- ☐ Send meeting invitation (with adequate notice)
- ☐ Confirm family availability and preferences (in-person, virtual, etc.)
- ☐ Offer opportunity for family input or concerns
- ☐ Send draft IEP in advance (if district practice allows)

5. Prepare the Meeting Space

- ☐ Reserve a private room
- ☐ Print necessary copies (draft IEP, goals, sign-in sheet)
- ☐ Prepare visuals or supports for student participation (if attending)
- ☐ Have sign-in sheet and agenda ready

6. Final Checks

- ☐ Review IEP for compliance (dates, signatures, service minutes, etc.)
- ☐ Ensure alignment between goals, accommodations, and services
- ☐ Know your talking points: student strengths, growth, next steps
- ☐ Breathe! You've got this!

Notes or Reminders
