

# IEP Success Companion Guide:

## Strategies for Collaborative and Student-Centered IEPs

A practical resource to support student-centered, strengths-based IEPs. It provides tools for preparation, facilitation, meaningful participation, and follow-through, ensuring a collaborative and effective process for educators, students, and families.



The “Individualized Education Program (IEP) success Companion Guide: Strategies for Collaborative and Student-Centered IEPs” is a joint effort of the [High-Quality IEPs](#) and [Pathways to Partnership](#) projects. These initiatives collaborate within the [California Statewide System of Support](#) to enhance student and family engagement while building the capacity of local educational agencies (LEAs), county offices of education (COEs), and special education local plan areas (SELPA).

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## Purpose

This essential resource provides a structured approach to fostering student-centered, collaborative, and legally compliant IEP meetings. It equips educators with the knowledge and tools needed to create meaningful and inclusive experiences for students and families, ensuring that the IEPs they create together are not just procedural documents but transformative opportunities for student growth and empowerment. Consider using the “IEP Success Companion Guide” in conjunction with the [High Quality IEP Toolkits](#).

## ■ Introduction

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- ☐ Creating Self-Awareness

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- ☐ Creating a Vision for a Successful IEP Meeting

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- ☐ IEP Meeting Logistics
- ☐ Promoting Meaningful Participation
- ☐ Legal Compliance and Accountability

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- ☐ Taking Action Post IEP
- ☐ Communication and Collaboration
- ☐ Implementation and Progress Monitoring
- ☐ Additional Support

## Creating Self-Awareness

As educators, we strive to meet our students' fundamental need for connection and belonging every day. This ongoing effort requires differentiation to meet the diverse social, emotional, and academics needs of our students. Our commitment to this work is driven by a desire to see our students meet their individual goals and thrive, both during the years they spend with us and in their future.

Elena Aguilar, CEO of [Bright Morning](#) and author of many books on transformational coaching, explains that to build resilient and healthy communities within our school buildings, we must tend to the beliefs, behaviors, and ways of being for not only our students but also ourselves as educators.

In this section of our guide, we will explore the importance of understanding our beliefs by creating self-awareness. "All of our actions emerge from beliefs, whether we are conscious of those beliefs or not," (Elena Aguilar, "The Art of Transformational Coaching," 2024, p. 37). Self-awareness, according to the California Department of Education's [Transformative Social and Emotional Learning Competencies](#), "is the ability to understand one's own emotions, thoughts and values and how they influence behavior across contexts."



### Self-awareness includes the following:

- Identifying one's emotions
  - Having a growth mindset
  - Identifying personal, cultural, and linguistic assets
  - Integrating personal and social identities
  - Demonstrating honesty and integrity
  - Linking feelings, values, and thoughts
  - Examining prejudices and biases
  - Experiencing self-efficacy
  - Developing interests and a sense of purpose
  - Reflecting on one's personal role and contributions within a community
- (Adapted from the [Collaborative for Academic, Social, and Emotional Learning, 2020](#))



### Why is this concept included in an IEP Success Companion Guidebook?

Just as we teach self-awareness as a crucial competency to our students, we must begin by developing it ourselves. By surfacing and examining our own beliefs through heightened self-awareness, we can better understand our actions and their impact on others.

#### Research shows that this introspective practice leads to improved:

- Identity
- Self-knowledge about purpose, values, and roles in the community
- Emotional intelligence (i.e., the ability to recognize emotions and their connection to behaviors)
- Growth mindset
- Strong and fair relationships

Becoming self-aware about our beliefs helps shape our ways of being and ultimately drives our behaviors towards our students, parents, educators, and—most importantly—ourselves.

### Let's explore!

We invite you to walk through the following activities to strengthen your sense of self-awareness and deepen your understanding of how you present yourself as an educator and how you perceive others. This understanding is essential for meeting the human needs of our students, staff, and families, ultimately fostering a sense of connection and belonging.



## Mental Models

Our experiences and identities are responsible for the beliefs we hold. Business theorist Chris Argyris explained how people form and maintain their assumptions, which he termed “mental models.” Mental models refer to internal frameworks that shape how we understand and interact with the world. Formed through our experiences and learning, mental models simplify complex information and influence our thoughts, perceptions, decisions, and actions. By examining and improving these models, we will think more clearly and reduce biases; in fact, recognizing and understanding our mental models is crucial in cultivating critical thought. By challenging and improving these internal views, we avoid biases and approach our day-to-day interactions more compassionately.



[Let's watch a short video on mental models!](#)

### Let's practice!

Recall a time when you've worked or interacted with a child with disabilities. As you explore those memories, ask yourself the questions listed below. While exploring your thoughts with curiosity, you may experience a wide range of feelings — some more comfortable than others:

- What is my mental model around students with disabilities?
- Where might my mental models have come from?
- What might have contributed to the creation of this mental model?
- What's the impact of holding this mental model?
- What does this mental model allow me to—or not do?
- How has it served me in the past?
- Is there evidence that the model I hold might not be true?
- Can I test an alternative to the model?

### II PAUSE AND REFLECT

Notes for reflection:

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We are often unaware of the mental models we hold, having learned them subconsciously from society at large and the people around us. By surfacing them, we put them in “check,” so to speak. When we examine these mental models, we can identify both their inherent biases and any disparities or inequities they may perpetuate through our actions.

Another way to think of our mental models is that some of our thoughts are on “autopilot.” Metaphorically speaking, “autopilot” describes a state of doing something automatically or unconsciously, without thinking or putting in much effort—such as when we perform routine tasks out of habit. This happens with our thoughts as well.

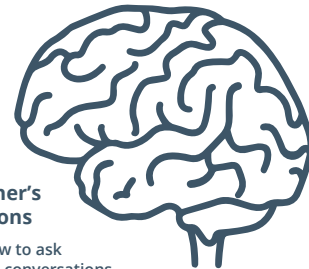
Use the following activities to develop awareness of your “autopilot” thoughts. Follow the prompts to describe the impact these thoughts have on those around us, as well as alternative thoughts that could be equally or more effective and equitable.

## Autopilot Thinking Activity

Event	Autopilot (automatic thought)	What view does this thought represent?	Alternative thought
“Example: The parent does not agree with the written goals.”	“I can never satisfy this parent.”	“I’m not good enough.”	“Perhaps the parent would prefer another goal,” or, “I’m going to communicate with the parent before the meeting to make sure we’re on the same page regarding goals.”

Click on the following image for a more complex and insightful mental-model activity:

# User's Guide to: Mental Models

[click to download](#)

## 1 Check Your Assumptions

## 2 Check Other's Assumptions

Source: The Fifth Discipline Fieldbook, Senge et al, 1994

*Do by yourself or with community partners*

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Grab a pen and fill in the work areas.



## Biases

Bias, or the preference for a particular person, group, or perspective, is not usually based on fact, but rather a combination of factors such as our age, gender, culture, personal experiences, and more. The source of our biases stems from our culture and social norms. Biases are part of our human nature and we all hold them. They can be both conscious (explicit) and unconscious (implicit), powerfully shaping not only our thoughts but also our behaviors and decisions:

**Explicit bias** is processed at the conscious level, allowing the person to be clear about their feelings and attitudes.

**Implicit bias** operates outside a person's awareness and consists of automatic assumptions and stereotypes that unconsciously influence our attitudes and behaviors.

**Implicit bias can come in many forms, including, but not limited to:**

- Race and ethnicity bias
- Age bias
- Gender bias
- Lesbian, gay, bisexual, transgender, queer, intersex, and asexual (LGBTQIA+) community bias
- Ability bias



[Watch a short video on countermeasures to implicit biases.](#)

## Social Identity

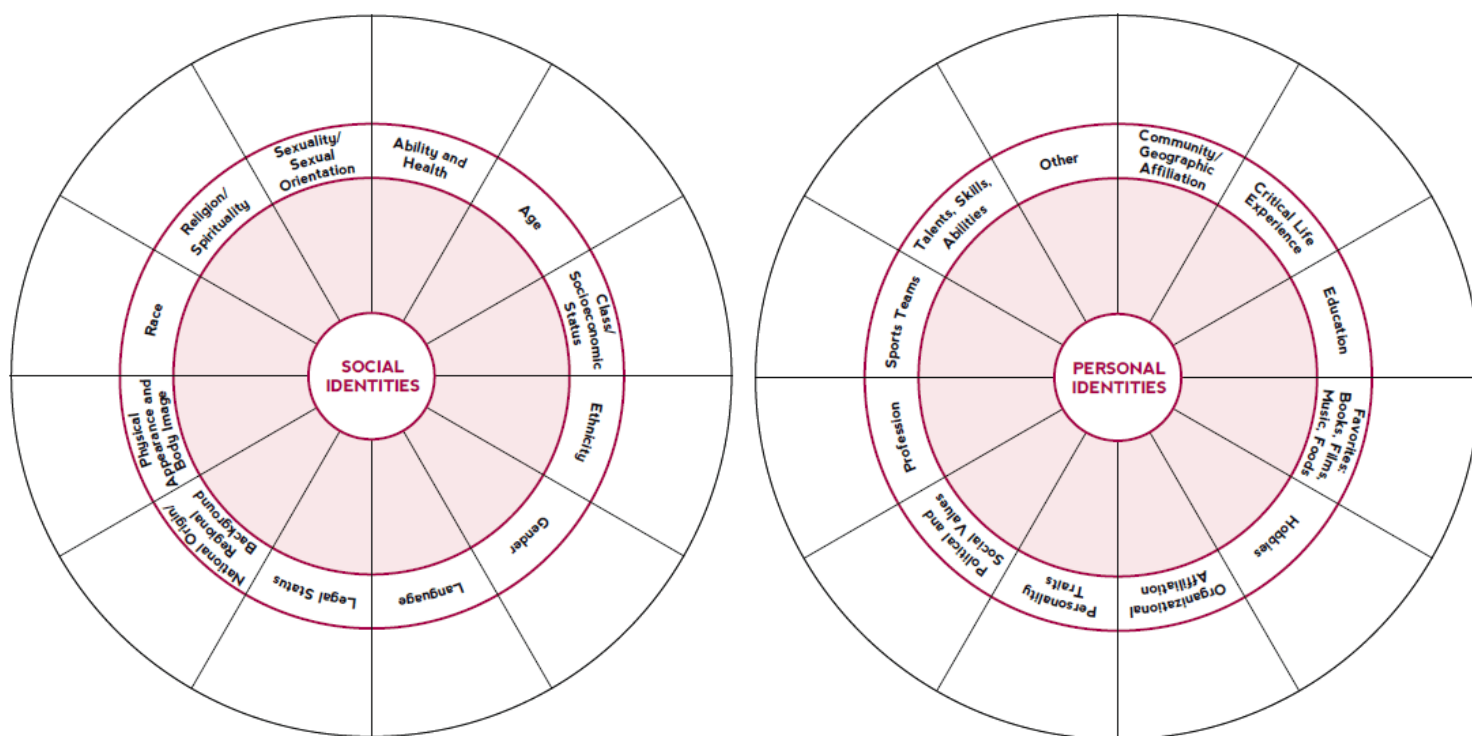
Cultivating self-awareness begins with understanding our social identities—the sense of who we are based on our group memberships. These identities, which are distinct from our personality traits, are socially constructed categories such as race, gender, religion, and sexual orientation. Our experiences are fundamentally shaped by these social identities and how they intersect in our lives.

### Why is it important to understand social identity as an educator?

Our social identities shape how we view the world and influence our interactions with students, families, and colleagues. By examining these influences, we can better understand what drives our actions and perceptions.

### Let's get started!

[Download](#) and complete the following identity wheels, created by Northwestern University, which illustrate the various dimensions of both our personal and social identities. It is important to remember that these identities are socially constructed and can provide power and privilege that influence our access and opportunities—whether consciously or not.



[CLICK TO NAVIGATE TO THE ACTIVITY](#)

## II PAUSE AND REFLECT

Reflect on the following questions after exploring the wheel:

- Which identities do you think about or feel most often? When are you most aware of these identities?
- Which identities do you think about or feel least often? Why do you think you are often unaware of them?
- Which identities have the strongest impact on how you perceive or define yourself?
- Which identities have the strongest impact on how you believe other people perceive or label you?
- As you reflect on your identities, do they afford you opportunities that are not available to individuals who have other identities?

When processing an experience, our minds move quickly and unconsciously from facts to conclusions. In MIT Professor Peter Senge's book "The Fifth Discipline: The Art & Practice of the Learning Organization," Senge illustrates the mental movement from facts to conclusions using a model called "the ladder of inference." This metaphor helps to build awareness of our assumptions and challenge our thinking before we act.

[This short video further explains how Senge's ladder of inference can help us mitigate our biases.](#)



### Let's practice!

The following activity will guide you through the ladder of inference, showing how we move from observable experiences to actions based on our beliefs. We often climb up and down these rungs unconsciously, but creating awareness of this process helps us surface and challenge our biases and any inequities they create.



## Where does this fit in the Equitable Results Sequence?



As an individual, it is important to understand what biases you are holding since these impact which data you will select or filter out. They also can influence how you analyze the problems in your community and create strategies. As you move through the Equitable Results Sequence, stop often to check your assumptions using the Ladder of Inference. Next time you notice yourself reacting negatively to your experience, pay attention.

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## User's Guide to:

# Ladder of Inference

## What is this?

The Ladder of Inference explains how we select data, attach meaning to that data and move to action. Because of our biases and limited perspectives, we can move in error based out of a incomplete or wrong understanding of reality.

## How could this show up in my work?

Remember a time you jumped too quickly to a negative conclusion and later regretted it? You probably climbed up the ladder of inference without stopping to slow down. We all do it. Unfortunately, it's part human nature. However, by being mindful of our biases, we can counteract systemic prejudices and create better outcomes for our communities.

## Framework in context:

Study this image. After seeing a scene of this man sitting on a bench, three different people could notice very different sorts of data and come to completely different conclusions based on their inner ladder or inference.



Your biases and limited perspectives allow you to only see certain parts of others' experiences and can lead you to draw conclusions that may be very different from reality.

**Notes:** \_\_\_\_\_  
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**Go on the portal to learn more!**  
[strivetogetherportal.org](http://strivetogetherportal.org)

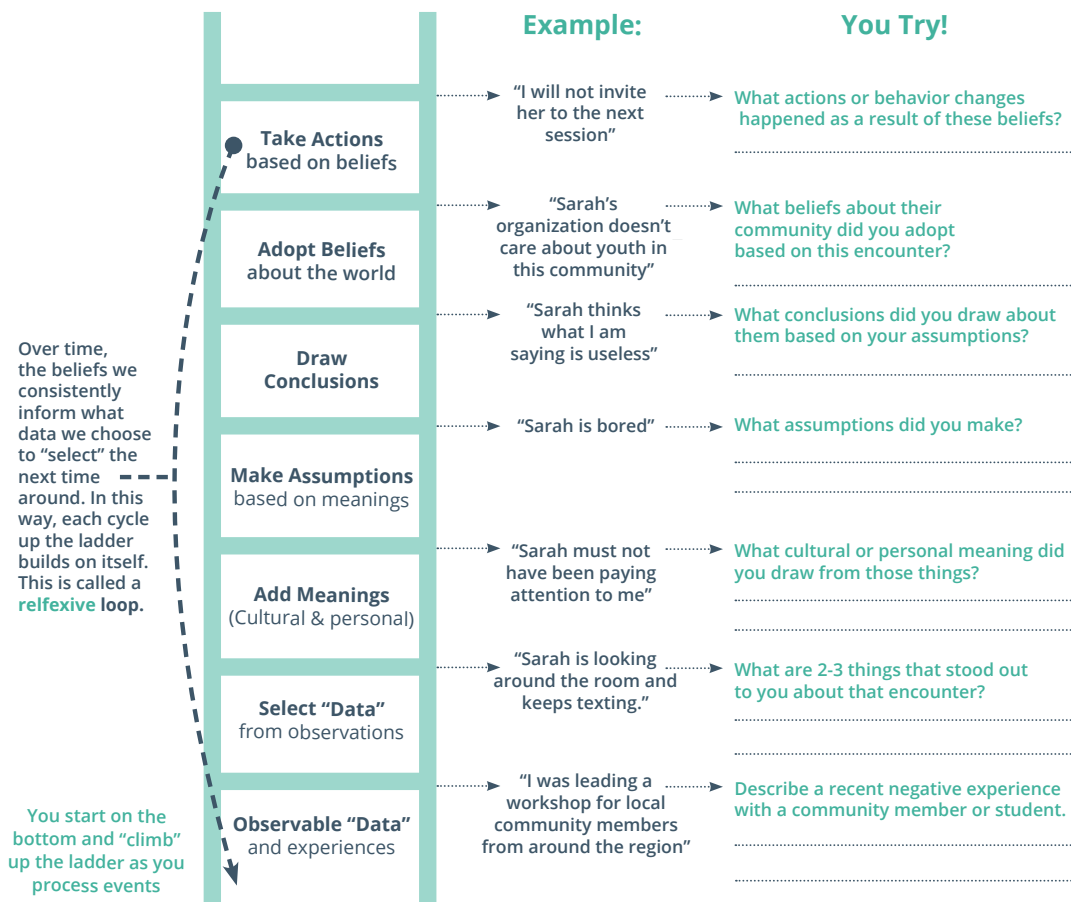
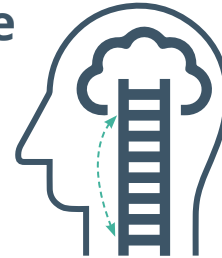
The Ladder of Inference shows how you can move from data you observe (bottom rung of the ladder) to beliefs and actions based upon assumptions (top of the ladder) very quickly.

## User's Guide to: Ladder of Inference

[click to download](#)

Every day, you meet people and process experiences by making inferences and developing beliefs about the world. There's so much happening around you at any given time that eventually you naturally begin to take mental shortcuts to make sense of the world.

Oftentimes you can move up and down the Ladder of Inference so quickly (within seconds) in your mind that you barely notice it has happened.



\*The Ladder of Inference was developed by Chris Argyris and was later adapted by Peter Senge to help explain mental models in his book *The Fifth Discipline: the Art and Practice of the Learning Organization*

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**Hey you!**  
Grab a pen and fill in the work areas.

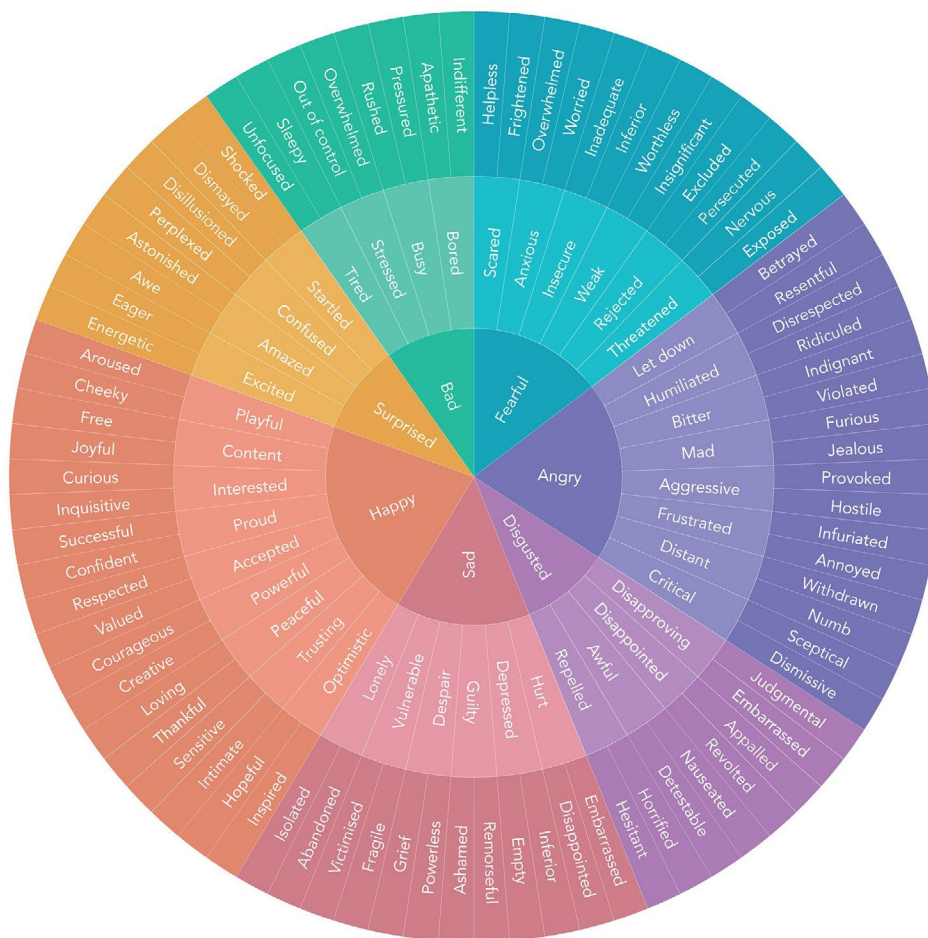


The “feelings wheel,” created by Dr. Gloria Willcox, is a valuable tool designed to help individuals more accurately identify and express their emotions.

Broad categories of emotion are depicted at the center of the wheel, like “happy” or “angry,” then branching into more specific emotions, such as “joyful” or “frustrated,” in the outer circle. By using this tool, we can gain a deeper understanding of our emotional states, improve our emotional communication, and foster greater emotional awareness in ourselves and others.

To use the feelings wheel, start by identifying a general emotion that you are experiencing from the center of the wheel, such as “happy” or “sad.” Then, move outward to find more specific emotions that better describe how you feel, like “content” or “lonely.” Doing so will help pinpoint your emotions more precisely and better understand your emotional state.

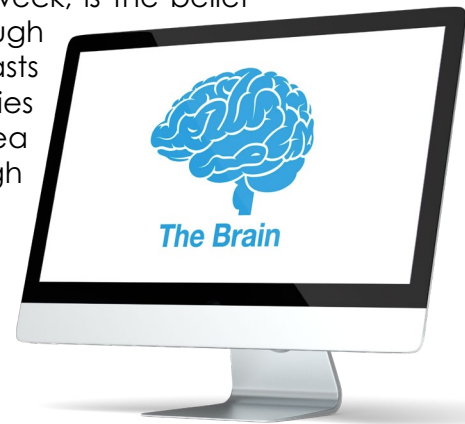
The feelings wheel allows us to better understand and express our emotions. It offers a range of specific feelings, making it easier to recognize complex emotions, communicate them clearly, and manage them in relationships and personal growth.



## Growth Mindset

A growth mindset, as defined by psychologist Carol Dweck, is the belief that abilities and intelligence can be developed through effort, dedication, and effective strategies. This contrasts with a fixed mindset, by which individuals see their abilities as unchangeable. The short video below discusses the idea that intelligence and abilities can be developed through learning and effort.

[Let's watch a short video on growth mindset!](#)



**For educators, adopting a growth mindset offers the following benefits:**

- **Enhanced problem-solving skills:** A growth mindset encourages us to view challenge as learning opportunities. An example of a growth mindset for educators is the belief that every student can succeed with proper support and strategies.

For instance, a teacher might think, "This student is struggling with solving addition problems right now, but with extra practice and personalized support, they can get better." As a result, the teacher tries different teaching methods, provides encouragement, and helps the student develop problem-solving skills, fostering both their learning and confidence.

- **Increased adaptability:** A growth mindset empowers educators to embrace adaptability by viewing challenges as opportunities for learning and improvement. Whether navigating new teaching methods, responding to evolving student needs, or integrating emerging educational technologies, educators with a growth mindset remain open to experimentation, refinement, and continuous development.

For instance, if a student's progress isn't as expected, the teacher might think, "This strategy isn't working as well as we hoped, but by trying new accommodations or supports, we can find a better approach." Instead of feeling discouraged by setbacks, the educator adapts by revising the student's IEP to better meet their unique needs.

## How Our Beliefs Also Impact Students

An educator's beliefs can significantly affect students with disabilities, influencing their academic success and well-being. The following research findings offer evidence in support of this idea:

### Expectations and Academic Achievement:

- [Hattie \(2018\)](#): "Collective teacher efficacy" refers to teachers' collective belief in their ability to positively affect students. With a 1.57 effect size, collective teacher efficacy is strongly correlated with student achievement.
- [Jussim and Harber \(2005\)](#): This review confirms that teacher expectations often lead to self-fulfilling prophecies in students' academic performance.

### Inclusive Practices:

- [Cook, Cameron, and Tankersley \(2007\)](#): This study found that teachers' positive attitudes toward inclusion correlate with more effective implementation of inclusive practices, thereby benefiting students with disabilities.

### Student Self-Esteem and Motivation:

- [Good and Brophy \(2008\)](#): This research indicates that teachers who hold positive beliefs about students' abilities consequently boost their confidence and motivation.

### Classroom Environment:

- [Pianta, La Paro, and Hamre \(2008\)](#): The findings of this study emphasize the role of positive teacher-student relationships in creating a supportive classroom environment, which especially benefits students with disabilities.

### Professional Development and Advocacy:

- [Scruggs and Mastropieri \(1996\)](#): This research shows that teachers who believe in the potential of students with disabilities are more likely to seek out and benefit from professional development in inclusive practices.

### Collaboration with Families:

- [Epstein and Sanders \(2000\)](#): This study demonstrates that teachers who value family involvement create stronger partnerships with families, leading to better student outcomes.
- [Hornby \(2011\)](#): The evidence of this study demonstrates that teachers' positive beliefs about family involvement enhance collaboration, benefiting students with disabilities.

## Putting It All Together

This section of our guide has reviewed how self-awareness helps us understand the way our beliefs influence our ways of being and, ultimately, our actions. We've explored tools that reveal how our experiences and mental models can lead to biases, affecting our interactions with others and how we contribute to group dynamics. These interactions occur in "generative social fields", which are collaborative environments where individuals and groups interact to foster creativity, shared understanding, and collective growth, leading to deeper connections and new solutions. The concept of generative social fields can be readily applied to our experiences in both IEP team meetings and other peer collaborations. [This short video](#) further explains the concept of generative social fields. Our ways of being and behaviors within the construct of the IEP team and throughout the IEP process are dependent on the intentions we bring to these interactions. By cultivating self-awareness and engaging mindfully, we can create spaces that encourage collaboration, respect diverse perspectives, and prioritize the needs and voices of students, ensuring that the IEP process remains both inclusive and effective.



## II PAUSE AND REFLECT

Reflect on the following questions:

- What information in this section resonates with me?
- How can I use what I've learned to build my relationships within the IEP team and positively influence the IEP process?
- What did I learn about my beliefs and assumptions?
- What is one idea or strategy I will commit to investigating further when it comes to building my self-awareness?

# Preparing for the IEP Meeting *before the IEP*

Building on our discussion of self-awareness and its impact on our work, let's examine how thorough preparation will lead to more successful Individualized Education Program (IEP) meetings. Preparing for an IEP meeting is essential in setting a collaborative tone and ensuring a smooth, efficient process. Preparation requires completing key procedural tasks such as scheduling, organizing necessary documents, and managing logistical details, which not only streamline the meeting but ensure compliance with the [Individuals with Disabilities Education Act \(IDEA\)](#). When we are thoroughly prepared for the IEP meeting, we create opportunities for meaningful partnerships among team members. Over time, these partnerships foster a sense of belonging and shared purpose, empowering us to co-create and work toward a unified vision for the student's success.

This section will review the following necessary elements before the IEP meeting:

- [IEP Meeting Logistics](#)
  - [Invitation/Meeting Notice](#)
  - [Agenda](#)
  - [Meeting Norms](#)
  - [Preparing the Environment](#)
- [Setting the Stage for a Successful IEP Meeting](#)
- [Creating a Vision for a Successful IEP Meeting](#)





## Invitation/Meeting Notice

An [invitation](#) to an IEP meeting (or “meeting notice”) is [legally required](#) and welcomes the parent to both attend and participate in the meeting. The local education agency (LEA) must take steps to ensure at least one parent attends the IEP meeting and has the opportunity to participate. The meeting notice also allows the parent(s) to prepare for the IEP meeting and contribute meaningfully to discussions and decision making.

Procedurally, the meeting notice serves as a formal record that the school has fulfilled its legal obligation to include the parent(s). Keep detailed records of your attempts to include the parent(s), including phone calls, written correspondence, and in-person visits. If the parents are unable to attend the IEP meeting, consult your local procedures.

### Things to consider:

- Assist the parent(s) in understanding what they should consider prior to the meeting, including options for attending, inviting additional attendees, and the need for an interpreter.
- When coordinating with staff and parent(s) for upcoming meetings, make use of automated reminders (e.g., one month prior, one week prior, day before, etc.) to give the team ample opportunity to prepare.
- [Document communication](#) with the parent(s) and the student regarding scheduling and preparing for the IEP meeting.
- Ask parent(s), student, and staff what days and times work with their schedule. A [scheduling survey](#) can help coordinate availability.
- Invite the IEP team, including the parent(s) and student, with the [Invitation to Individual Educational Program Team Meeting/Meeting Notice](#).
- Consider sending out [IEP reminder cards](#). Please note, these reminder cards must be used in addition to the [IEP meeting notice](#), which satisfies procedural notification requirements. Email, texts, and phone calls sent to schedule meetings must be used in conjunction with the official meeting notice.

## IEP Excusal Form

An [IEP excusal form](#) is a document used to officially excuse a required IEP team member from attending a meeting in whole or in part. According to [IDEA](#), an excusal is permissible if the parent(s) and the LEA agree in writing that the team member is not required to attend because: 1) their area of curriculum or related service is not being modified or discussed 2) their area of curriculum or related service is being modified and the member submits input into the development of the IEP in writing prior to the meeting. In either case, written consent must be provided by the parent and agreed to by the LEA before the IEP meeting.

## Agenda

Creating an agenda helps ensure structure, focus, and productivity during an IEP meeting. A well-designed agenda provides a roadmap for discussion that balances the procedural requirements of IDEA with the specific needs of the IEP team. It allows sufficient time to address all necessary items, such as reviewing the student's progress, setting new goals, and determining services, while also promoting collaborative input from all team members. Sharing the agenda in advance gives participants time to prepare, fostering transparency and more meaningful contributions. If all items cannot be addressed during the meeting, scheduling a continuation ensures thorough discussion of all topics. A flexible yet focused agenda ensures that IEP meetings remain organized, inclusive, and centered on the student's needs.

### Here are some ideas to consider when preparing an IEP meeting agenda:

- Draft a clear and structured outline of the topics to be covered in the order they will be discussed. The topics should be organized in alignment with the sequence of the IEP pages for a smooth flow of discussion.
- Develop the agenda in advance of the meeting, with input from all IEP team members to ensure a comprehensive agenda. This also offers an opportunity to connect with the parent(s) regarding topics or concerns to include on the agenda.
- Estimate and allocate time for each topic, including buffer time for unexpected questions or concerns.
- Prioritize important topics to ensure they receive adequate attention.
- Share the agenda in advance with all team members to allow everyone to prepare.
- Keep the agenda flexible to accommodate the team's needs.

Each agenda may be customized to reflect the meeting's purpose and the needs of the IEP team. Here is a [sample agenda](#) for you to consider using in your LEA. An [annotated agenda](#) not only provides a clear flow to the meeting but also explains each part of the meeting.

## Meeting Norms

Meeting norms are agreed-upon guidelines that ensure respectful and productive interactions, help IEP team members stay focused and engaged, and encourage open communication. Establishing meeting norms creates a positive and collaborative environment, enabling the IEP team to work together in developing a comprehensive and meaningful plan for the student's education.

### Here are some ideas to consider when preparing meeting norms for an IEP meeting:

- **Collaborative approach:** Foster buy-in and mutual respect by involving all team members in the creation of meeting norms.
- **Student-centered norms:** Prioritize the student's preferences and interests when addressing needs and goals.
- **Use straightforward language:** Avoid jargon when creating norms, allowing all participants to access the conversation.
- **Encourage open dialogue:** Create norms that facilitate open communication and the sharing of ideas and concerns.
- **Balance participation:** Develop norms that encourage contributions from all participants — including quieter team members — without allowing a single voice to dominate the discussion.

### To get the IEP team started, here are some [common norms](#) used by IEP teams:

- ▶ Start and end the meeting on time.
- ▶ Stick to the agenda and time limits.
- ▶ Allow one person to speak at a time and avoid interruptions or side conversations.
- ▶ Acknowledge and consider all perspectives.
- ▶ Encourage everyone to participate and share ideas.
- ▶ Keep the student's needs and goals as the central focus.

Consider [additional ideas](#) to customize meeting norms.

## Frequently Asked Questions Regarding Meeting Norms

### How do I use meeting norms?

- Post sample norms.
- Ask if anyone has objections, revisions, or additions.
- Ask for agreement with a “yes” or thumbs up.

### What if someone won’t agree?

- Ask which norms they find challenging.
- Ask which norms they would be comfortable with.
- Ask if the meeting can continue without agreement.
- If agreement isn't possible and a participant is unwilling to either abide by norms or suggest alternatives, suggest a break. Encourage the member to think about their desired outcomes.

### What if a participant won’t follow the agreed upon norms during the meeting?

- Use the written norms as a point of reference.
- If a participant is unwilling to follow rules (e.g., breaks from the agenda, refuses to listen to another's point of view, etc.), the facilitator may suggest a break and speak privately with the participant.
- To ensure a productive discussion, the team may consider postponing the IEP meeting if norms are not being followed.



## Preparing for In-Person Meetings

The environment in which an IEP meeting is held can significantly impact the effectiveness and comfort of the participants. A welcoming, neutral setting encourages open dialogue and collaboration. The room should be spacious enough to accommodate all participants comfortably, with a table arrangement that promotes equality and easy communication. Avoid seating arrangements that isolate parent(s) or students, as this can make them feel uncomfortable or marginalized.

Preparation is key to a successful IEP, especially in creating an environment where all team members, including parents, can concentrate and actively engage in the discussion.

### Here are some ideas you might consider as you prepare for an in-person meeting:

- Prior to the meeting, send home a hardcopy of any materials that will help the parent(s) prepare and participate meaningfully during the meeting.
- Clearly indicate any portions of the IEP portions and/or other documents that are in draft form to encourage further contribution from parent(s).
- Make advance arrangements for an interpreter, if needed. Ensure that interpreters are positioned to communicate effectively with, and for, parent(s) requiring their services.
- Ensure the environment is comfortable and promotes collaboration (e.g., seating arrangements are thoughtful; tissues, water, etc. are available).
- Make sufficient copies for each IEP participant.
- Make sure technology is set-up and working properly.
- Have pens, highlighters, sticky notes, etc. available.
- Ensure confidentiality when choosing a meeting location.
- Consider setups like those illustrated below to encourage collaboration and discussion.





## Preparing for Virtual Meetings

Occasionally, participants need to connect from different locations, making virtual meetings essential. A virtual IEP meeting is an online collaboration where educators, parents, and specialists use video conferencing platforms to develop, review, and update a student's IEP. Be sure to consult with your local procedures for guidelines on conducting virtual meetings.

A virtual IEP meeting requires careful preparation to be successful. Eliminate any technical barriers and create an environment where parent(s) are able to focus on the IEP meeting and actively engage in the discussion.

### Here are ideas to consider when preparing for a virtual meeting:

- Prior to the meeting, send home a hardcopy of any materials that might help the parent(s) prepare and participate meaningfully during the meeting.
- Ensure technology is reliable and accessible for all participants, especially the parent(s).
- Test audio and video equipment before the meeting to avoid technical difficulties.
- In advance, provide parent(s) with a direct link to the meeting, as well as clear, simple instructions on how to join; this is especially critical if an interpretation feature will be used.
- Offer an opportunity for the parent(s) to test the virtual platform beforehand and ask for assistance.
- If an interpreter is needed, make arrangements to ensure parent(s) have access to the necessary technology and understand how to use it.
- Display a welcome message or PowerPoint slide for team members to view while waiting for the meeting to start while maintaining confidentiality.
- Support parent(s) in preparing for the virtual meeting.



A successful IEP meeting requires careful preparation from all team members, as each person plays a vital role in the process. When case managers, educators, parent(s), and students (when appropriate) come prepared, the meeting becomes a true collaboration focused on the student's success. Thoughtful planning ensures that all relevant areas are addressed, allowing every team member to meaningfully contribute to the development of an IEP that meets the student's unique needs.

To support this process, the High-Quality IEPs Project has developed checklists tailored for key participants, including parent(s), students, special education providers, general education teachers, and administrative designees. These checklists outline essential steps to take before, during, and after the IEP meeting.

We encourage you to use the checklists below as a foundation, adapting them to align with the specific requirements and practices of your local educational agency (LEA). Customize or expand the checklists provided to ensure they meet your district's procedures and the needs of your students.

- [IEP Planning Checklist for Special Education Providers](#)
- [IEP Planning Checklist for Administrative Designees](#)
- [IEP Planning Checklist for General Education Teachers](#)
- [IEP Planning Checklist for Parents](#)
- [IEP Planning Checklist for Students](#)

Supporting all team members—especially parent(s)—in preparing for the IEP process is key to fostering meaningful engagement. True engagement goes beyond mere attendance; it ensures that parent(s) and students feel heard, valued, and actively involved. [This resource](#) provides strategies to enhance participation and make the IEP journey a truly collaborative experience.

Prepare for your upcoming IEP meeting by envisioning what a successful meeting would look like and reflecting on the steps needed to achieve it. A clear vision will guide your preparation and set a positive tone for the meeting.

As you develop your vision, consider the following prompts:

- **I will be successful if I prepare for the IEP by** \_\_\_\_\_.  
(e.g., reviewing the student's present levels, drafting measurable goals, communicating with team members in advance, creating an agenda).
- **How will this make me feel?** \_\_\_\_\_.  
(e.g., confident, organized, ready to lead).
- **IEP team members will feel** \_\_\_\_\_ (e.g., valued, included, informed, supported) **based on how prepared I am to** \_\_\_\_\_ (e.g., provide clear communication, ensure all data is available, foster collaboration).

By reflecting on these questions, you will align your intentions with actionable steps, ensuring a meeting that is productive, inclusive, and focused on the student's success.

# Conducting the IEP Meeting during the IEP

In this section, we shift our focus to the dynamics of the Individualized Education Program (IEP) meeting itself, exploring how to conduct it in a way that is student-centered, inclusive, and asset-based. Having laid the groundwork for an IEP both procedurally sound and thoughtfully inclusive, we now delve into practical strategies for facilitating a meeting that truly honors the contributions of each team member and, most importantly, amplifies the student's voice. By prioritizing the strengths and needs of the student, we create an environment of genuine collaboration and respect. This section will guide you through essential components of the process "During the IEP," including establishing meeting logistics, grounding the team, encouraging meaningful engagement, and managing potential challenges. With these tools, you can foster a positive, effective IEP meeting that supports every participant and centers on the student's success.

## ■ Conducting the IEP Meeting

- ☐ Strategies to Support Student-Centered and Assets-Based IEPs
- ☐ IEP Meeting Logistics:
  - ☐ Hosting vs. Facilitating an IEP Meeting
  - ☐ Agenda
  - ☐ Meeting Norms
  - ☐ Procedural Safeguards
  - ☐ Grounding the IEP Meeting
  - ☐ IEP Note Taking
  - ☐ Bridge Board
- ☐ Promoting Meaningful Participation
  - ☐ The Power of Listening: Fostering Awareness and Acceptance
  - ☐ Navigating Differences During an IEP Meeting

## ■ Ensuring Legal Compliance & Accountability: A Walk through the Key Components of Educational Benefit

- ☐ Key Component 1: Assessment
- ☐ Key Component 2: Present Levels
- ☐ Key Component 3: Determining Need
- ☐ Key Component 4: Measurable Goals
- ☐ Key Component 5: Supports and Services

A student-centered and asset-based IEP offers a fresh, holistic approach by focusing on the unique strengths, preferences, and interests of each student. Unlike the traditional IEP model, which often emphasizes areas of difficulty and prescribes interventions, this approach affirms and incorporates students' assets, interests, and agency. By celebrating students' strengths and recognizing their potential for growth, a student-centered IEP fosters a positive learning environment that values each individual's contributions. In addition, it promotes resilience and self-advocacy, empowering students to develop a sense of self-efficacy. In so doing, it lays the foundation for lifelong learning and success.

### Here are some ideas to consider when developing a student-centered and asset-based IEP:

1. **Identify strengths:** Include information from a variety of sources and people to identify the student's strengths, interests, preferences, and needs across various domains.
2. **Asset-based goal setting:** Set goals that build upon the student's strengths and interests, rather than focusing solely on remediation of weaknesses. These goals capitalize on the student's assets and promote growth and development.
3. **Asset-based interventions:** Design interventions and accommodations that leverage the student's strengths in support of their learning and development. This may involve incorporating their interests into the curriculum, providing opportunities for hands-on learning, or tapping into their talents to increase engagement and motivation.
4. **Collaborative planning:** Involve all IEP team members in the planning process, including the student and parent(s), to ensure that goals and interventions align with the student's strengths and needs. Empower the student to take an active role in the IEP process by reflecting on their strengths, and encouraging their participation in setting goals and decision-making. Their input is valuable in ensuring that the IEP reflects their needs, preferences, and aspirations.
5. **Progress monitoring:** Continuously monitor the student's progress towards their goals and make adjustments to interventions as needed. Celebrating successes and growth reinforces the student's confidence and motivation.

Asset Based	Deficit Based
Strengths driven	Needs driven
Opportunity focused	Problems focused
Internally focused	Externally focused
What is present that we can build upon?	What is missing that we must go find?
May lead to new, unexpected responses to community wishes	May lead to downward spiral of burnout, depression, or dysfunction

Green, G.P. and Haines, A. (2008), *Asset Building and Community Development*, 2nd Ed. Sage Publications, Los Angeles.



## Hosting the IEP Meeting

Deciding who will host an IEP meeting is an essential preparatory step. According to the Individuals with Disabilities Education Act (IDEA), [the IEP team](#) is intentionally composed of diverse members—including the general education teacher, parent(s), administrative designee, education specialist, and as appropriate, the student—to collaboratively develop an educational plan in the best interest of the student with a disability. This diversity ensures multiple perspectives, fostering a more comprehensive and individualized plan.

In many cases, the case manager assumes the role of host for the meeting. The key responsibilities of the host include starting the meeting, setting up and guiding the team through [the agenda](#), addressing questions, and ensuring the meeting runs inclusively and efficiently. It's important to consult with your school site team ahead of time to clearly define who will lead the IEP meeting.

### Something to consider:

- Assigning roles and responsibilities during an IEP meeting can promote inclusivity and efficiency. Consider getting the IEP team involved by assigning roles. Examples include but are not limited to: time keeper, note taker, action plan recorder, etc.

## What is IEP Facilitation?

In some situations, additional support may be needed to foster effective communication and collaborative problem-solving during an IEP meeting. This process is known as IEP facilitation. Although facilitation techniques are encouraged as a best practice in all IEP meetings, there may be circumstances in which the support of a trained, neutral facilitator is needed. The facilitator may be an internal member of the district such as a school psychologist, program specialist, or director, or an external individual, such as a special education local plan area (SELPA) program specialist, SELPA director, alternative dispute resolution (ADR) coordinator, or a paid facilitator.

Facilitators are impartial professionals who typically do not have a direct relationship with the IEP team. Acting as neutral third parties, they are trained in specialized techniques to enhance communication, promote collaboration, and assist the team in reaching consensus. Along with handling hosting duties as previously discussed, facilitators are trained in advanced communication techniques to keep the team focused on student-centered outcomes. They create a structured and supportive environment that allows team members to address concerns, clarify misunderstandings, and work toward mutually agreeable solutions. Their goal is to prevent disputes from escalating and to foster a collaborative approach to developing an educational program that meets the student's needs.

In some cases, IEP facilitation may be requested proactively by parent(s) or districts when complex issues arise or when communication challenges have previously impacted the team's

ability to work together effectively. Many SELPAs and school districts offer facilitation services as part of their ADR programs, recognizing its value in preventing formal disputes and maintaining positive working relationships among all parties involved.

Whether a facilitator is involved or not, clear planning around meeting leadership is essential in creating an inclusive, effective, and student-centered IEP process. By fostering collaboration and ensuring all perspectives are valued, facilitation helps support meaningful outcomes for students.

For more information about IEP facilitation, consult your special education department, SELPA, or [Pathways to Partnership's resources](#).

## Agenda

Here are some ideas to consider when preparing an IEP meeting agenda:

- **Follow the agenda:** Stick closely to the agenda to ensure all important topics are covered efficiently.
- **Monitor time:** Track time for each item to keep the meeting on schedule and allow thorough discussion.
- **Encourage participation:** Involve all team members in the discussion so everyone contributes.
- **Stay flexible:** Be prepared to adjust the agenda to include unexpected questions or concerns that may arise during the meeting.
- **Review and summarize:** Regularly summarize discussion points and decisions to keep everyone aligned and confirm mutual understanding.
- **Address parent concerns:** Allow time to address questions or concerns from parent(s), ensuring their input is considered.
- **Create an [action plan](#):** If necessary, create an action plan that delineates follow-up items and the person responsible.

For more information on how to prepare an IEP meeting agenda, please refer to [Before the IEP: Preparing for the IEP Meeting](#).

Here is a [sample agenda](#) for you to consider using in your local education agency (LEA).

An [annotated agenda](#) provides a clear flow to the discussion and explains each part of the meeting.



## Meeting Norms

Here are some ideas to consider when using meeting norms during an IEP meeting:

- **Establish norms at the start:** Begin the meeting by establishing and/or reviewing norms. It is important to have agreement within the team.
- **Make norms available:** Ensure the IEP team members have access to the agreed-upon norms throughout the meeting.
- **Student-centered focus:** Continuously prioritize the student's preferences, interests, needs, and goals in discussions, keeping the meeting centered on their educational outcomes.
- **Monitor adherence to norms:** Gently remind team members of the set norms if discussions veer off track or if interactions become less productive.
- **Summarize and reflect:** Periodically summarize key points and reflect on how well the team is adhering to the norms, making adjustments as needed to keep the meeting on track.

## Ensure Parents Are Aware of their Procedural Safeguards

LEAs must inform the parents of a child with a disability of the [procedural safeguards](#) set by IDEA. In support of students' families and our fellow educators, we must be familiar with procedural safeguards and ready to answer questions as needed.



## Grounding the IEP Meeting

Given the complexity of an IEP meeting and the deep emotional investment parent(s) and students have in the process, it is important to acknowledge that IEP meetings can be stressful. Discussing a student's challenges and needs can be emotionally charged; negative past experiences may also contribute to stress and apprehension. These factors can lead some IEP team members to arrive at the meeting with reservations or stress. With this in mind, how we start the meeting can help the team ground themselves in the here and now and move beyond past experiences and emotions. Consider the following [grounding activities](#) to set the right tone.

Activity	Explanation
Appreciation round	Have each member share one thing they appreciate about another team member or the student's progress. This fosters a positive atmosphere and highlights successes.
Favorite teaching/support strategies	Ask each participant, including the parent(s), to share a positive experience supporting the student.
Goal-setting activity	Start by having everyone share one goal they hope to achieve during the meeting. This aligns the team and sets a collaborative tone.
Quick check-in	Begin with a quick, informal check-in where each member shares one word or phrase that describes how they are feeling about the meeting. This can help acknowledge any existing emotions and create a supportive environment.

## IEP Note Taking

Taking clear and appropriate notes during an IEP meeting is essential in documenting the team's discussion, decisions, and collaborative efforts to create a tailored education plan for the student. These notes create a valuable written record of the meeting, capturing elements that may not be explicitly included in the finalized IEP document. While there is no specific legal guidance dictating what information IEP notes must include, they should accurately reflect the team's discussions, fostering transparency and supporting effective communication.

**Below is a list of effective strategies for IEP note-taking:**

### Document IEP Meeting participants

**Record attendance:** List the names and titles of all IEP team members present. This ensures compliance with IDEA, which requires the participation of specific team members.

**Note excusals or absences:** Document any team member who is excused from the meeting, and attach the [excusal form](#), if applicable.

### Document Parents' Participation

**Highlight meaningful participation:** Record parents' questions, concerns, and contributions throughout the meeting. This demonstrates the district's commitment to parental involvement, a key requirement under IDEA.

**Include agreements and disagreements:** Note areas where parent(s) agree or disagree with the proposed plan, as well as any requests or suggestions they offer.

**Capture the tone of collaboration:** Use objective language to reflect parents' input and the team's responsiveness.

### Organize Notes Using the Agenda

**Follow the structure of the meeting:** Use the meeting agenda as a framework to organize your notes. This helps maintain a logical flow and ensures all topics are captured.

**Mark key transitions:** Clearly indicate when the team has moved from one agenda item to another to make the notes easier to follow.



## Use Concise, Objective, and Student-Focused Language

**Avoid biased or subjective language:** Stick to factual, clear, and neutral descriptions of the discussion.

**Focus on individualization:** Avoid generic or stock phrases. Ensure notes reflect the unique needs and circumstances of the student being discussed.

## Reflect Input from All IEP Team Members

**Capture diverse perspectives:** Document contributions from all team members, including special education teachers, general education teachers, service providers, and administrators.

**Ensure a collaborative tone:** Accurately reflect the ebb and flow of the discussion and agreements reached.

## Solicit Input and Clarification

**Ask questions as needed:** If a point of discussion is unclear, seek clarification during the meeting. This ensures accurate and complete notes.

**Confirm with the team:** Read key points or summaries back to the team to verify accuracy and understanding.

## Document Action Items

**Outline next steps:** Record any follow-up tasks or responsibilities assigned during the meeting.

## Review Notes

**Proofread for accuracy:** Double-check the notes for completeness and clarity before finalizing.

**Align with the IEP:** Ensure the notes support the decisions documented in the finalized IEP.

By following these strategies, IEP notes can be a powerful tool for accountability, communication, and collaboration. Thoughtful, organized, and accurate notes not only ensure compliance with legal requirements, but build trust and transparency among all IEP team members, ultimately supporting the student's educational success.

## Using a Bridge Board

Important topics and questions often arise during an IEP meeting that the team may not be able to immediately address—either due to the flow of the agenda or because additional information is needed. Establishing a dedicated space for these items ensures they are acknowledged, documented, and revisited, fostering a culture of respect and collaboration.

This approach shows value for every participant's contributions by ensuring their thoughts are heard and considered, while remaining focused on the meeting's objectives. The balance lies in keeping the discussion on track while validating and addressing emerging concerns. To achieve this balance, you may use a "[bridge board](#)" to connect questions and concerns with acknowledgments and solutions.

### Bridge Board



## Steps to Effectively Create and Utilize a Bridge Board

### 1. Establish a dedicated space.

Create a [virtual](#) or physical space (e.g., a shared document, whiteboard, or digital tool) to capture ideas, questions, and concerns that need to be revisited. Ensure all IEP team members have access to the space and responses.

### 2. Know when to use the bridge board.

When topics arise that are not in step with the meeting agenda or will be discussed at a later point, add these topics to the space on the bridge board dedicated to "items that need to be addressed."

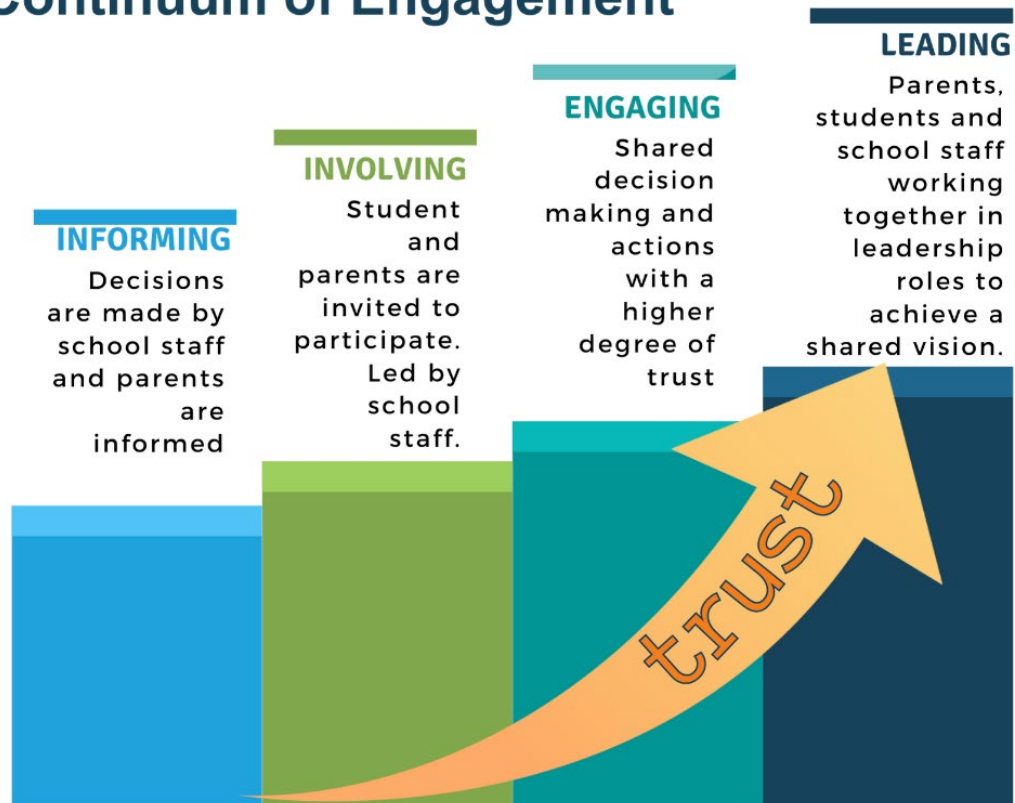
### 3. Engage the team in exploring items that need to be addressed:

- **Collaborate to generate solutions**, leveraging the team's expertise and perspectives.
- **Ask clarifying questions** that deepen understanding of concerns and priorities.
- **Encourage creative and innovative problem solving** to meet student needs.
- **Build consensus** with shared decision making and buy-in from all members.
- **Take action** by experimenting with suggestions, implementing solutions, and scheduling follow-ups if needed. For topics not addressed during the meeting, create an [action plan](#) to ensure follow through.

## Encouraging Participation and Meaningful Engagement

Working together during the IEP meeting helps to foster family-school partnerships and encourages engagement. As educators, we can help to build opportunities for engagement during the IEP meeting. True engagement involves shared decision making and trust. It is critical to set the right tone at the outset of the meeting, including by taking steps to show that parent(s) are equal team members, such as escorting them into the meeting, having school staff stand when parent(s) enter the room, and ensuring that staff members who have a strong relationship with the parents are seated nearby.

### Continuum of Engagement



**Explore more:** [This resource](#) explores strategies for enhancing participation and making the IEP journey a truly collaborative experience.

## The Power of Listening During IEP Meetings: Fostering Awareness and Acceptance

Effective listening is a cornerstone of meaningful communication, especially in high-stakes settings like IEP meetings. These discussions are deeply personal, often charged with emotions, and centered on decision-making that will impact a student's future. By cultivating awareness and acceptance in our listening practices, we can create the conditions for trust, understanding, and collaboration—even when tensions run high.

In her book ["The Listening Leader: Creating the Conditions for Equitable School Transformation"](#), Shane Safir discusses how listening allows us to engage two critical elements of mindfulness: awareness and acceptance.

- **Awareness** means bringing attention to the present moment by observing our thoughts, feelings, and sensations without judgment.
- **Acceptance** means embracing what is happening in the moment without resistance or avoidance.

When we practice awareness through listening, we create space to understand and address the basic needs of ourselves and others. This is particularly vital during IEP meetings, where the sensitive nature of the discussion may lead to emotional reactions. Recognizing these emotions—both for ourselves and others—enables us to respond thoughtfully and compassionately, rather than impulsively.



## Before the IEP Meeting: Preparing to Listen

Before entering an IEP meeting, it is crucial to keep ourselves centered. William Ury, in his video [The Power of Listening](#), emphasizes the importance of taking a moment of silence before any significant conversation. This pause allows us to tune into our own thoughts and feelings, letting go of what we're holding onto internally so we can make space for others. By grounding ourselves in the present, we increase our capacity to listen with genuine empathy and openness.



[CLICK TO WATCH](#)

### During the IEP Meeting: Promoting Listening and Connection:

1. **Set the tone by acknowledging the shared purpose of the meeting:** supporting the student's growth and success. Acknowledge that this process can bring up strong emotions and encourage everyone to approach the discussion with curiosity and respect.
2. **Be fully present** by focusing on the speaker without interrupting or formulating responses in your mind. Use non-verbal cues such as nodding or maintaining eye contact to show you are engaged.
3. **Validate emotions** as they surface, whether from parent(s), students, or educators. Take a moment to acknowledge these emotions with phrases like, "I can see how much you care about this," or "It sounds like this is really important to you." Such acknowledgments validate their feelings and build trust.
4. **Ask clarifying questions** instead of making assumptions. Deepen your understanding through open-ended questions like, "Can you share more about what's been challenging?" or "What would success look like to you?"
5. **Reflect and summarize** key points to ensure everyone feels heard and aligned. For instance, ask "What I'm hearing is that you'd like more strategies to support your child's focus in class. Is that correct?"
6. **Create space for student voices** by actively including them if they are present. Ask for and honor their input, emphasizing their role as the central figure in the IEP process.



## Navigating Differences/Disagreements During an IEP Meeting

IEP meetings can become emotionally charged, leading to unproductive outcomes. Our responsibility is to manage the tone, guide the discussion, and ensure the meeting remains focused on the student's best interests. Below are strategies to help defuse tension and restore productivity.

### Use Neutral Language

**Avoid defensive responses:** [Remain neutral](#) and professional, even when faced with criticism. Reframe negative comments to focus on problem-solving. For example, use “we” when referring to the process to emphasize shared decision making and collaboration. Use “you” when referring to the content discussed during the meeting to clarify and acknowledge what the individual is saying.

**De-personalize issues:** Shift the focus from personal grievances to the student's needs. For example, instead of debating who is right, ask, “What does [student's name] need to succeed in this area?”

### Pause and Acknowledge

**Call for a short break:** Allow the opportunity to reflect, process, and gain perspective. A brief pause can help de-escalate emotions and allow individuals to regroup.

**Acknowledge emotions:** Recognize the feelings in the room without assigning blame. Phrases like, “I see this is a very important issue for everyone here,” can validate emotions while keeping the focus constructive.

### Clarify and Refocus

**Restate the purpose:** Gently remind the team that the shared goal is to develop an effective plan that supports the student's educational needs. Utilize the agenda as needed.

**Summarize key points:** Recap agreements reached so far and clarify areas of disagreement to ensure everyone is aligned. Consider using the bridge board as a space to document the team's perspectives.

**Additional resource:** [Process Toolkit](#)



## Adjust the Meeting Structure

**Set clear ground rules:** If not established earlier, propose [meeting norms](#) for respectful communication.

**Use a round-robin format:** Give each participant uninterrupted time to speak, ensuring all voices are heard without cross-talk.

**Make it visual:** Create visual documents that include detailed information or proposals. This format enhances clarity, separates ideas from individuals, ensures team members feel heard, and improves accessibility for all.

**Additional resource:** [Breaking Impasse](#)

## Propose Next Steps

**Table specific issues:** If consensus cannot be reached, suggest tabling the issue for further data collection or consultation with specialists.

**Schedule a follow-up meeting:** When emotions run high, it may be productive to reconvene after all parties have had time to reflect.

**Propose a trial period:** After reviewing the proposal and identifying a promising option, suggest implementing a trial period to gather more information. During the meeting, set a specific date to reconvene and assess the results.

## Know When to End the Meeting

**Adjourn gracefully:** If attempts to refocus fail and the meeting is no longer productive, propose ending the session with a clear [action plan](#) for follow-up.

**Document the discussion:** Summarize key points, decisions, and next steps in the IEP meeting notes to ensure clarity moving forward.

If your IEP team is unable to resolve differences during the meeting, consult your special education department or SELPA.

**Additional resources:** [Constituents' Office](#) | [Pathways to Partnership](#)

The Individualized Education Program (IEP) is developed to meet the individual needs of a student with a disability while adhering to a set of requirements mandated by the Individuals with Disabilities Education Act (IDEA). These requirements are two-fold, consisting of both [procedural and substantive requirements](#). If followed, these guidelines will result in an IEP that provides the student a free appropriate public education (FAPE). Conversely, the failure to follow procedural and substantive requirements can lead to a denial of FAPE.



## What is FAPE?

FAPE is a legal requirement ensuring that every student with a disability receives an education tailored to their unique needs at no cost to the family. This includes placement in the least restrictive environment (LRE) to the greatest extent appropriate and the development of an IEP that provides meaningful educational benefit in compliance with the law.

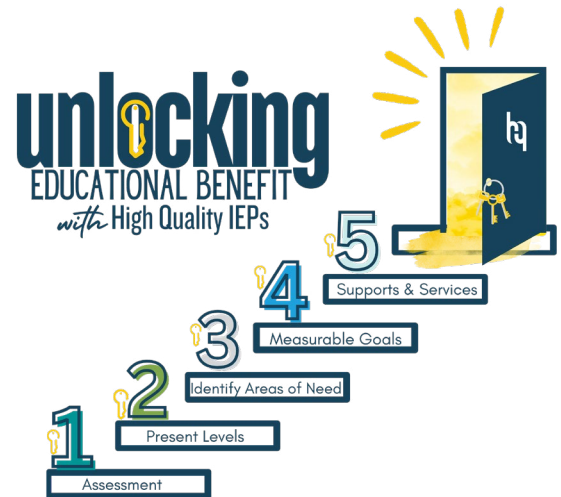
Procedural Requirements	Substantive Requirements	Implementation
Stipulated by ed code—the “when” and “how” of the IEP process.	Not specifically detailed by the law but represents the “what,” which must be reasonably calculated in light of the child’s circumstances.	We must monitor the “what” to ensure it was reasonably calculated.

## Let's delve deeper into the concept of educational benefit during the IEP meeting.

The IEP meeting should consistently center around the educational benefit of the student. This is not measured through a single data point or from within the IEP, but through a comprehensive review of key components mandated by law. Each of these components should intentionally build upon one another to create a truly individualized education program.

By systematically addressing each key element of educational benefit, the IEP team is more likely to meet both the procedural and substantive requirements outlined in IDEA.

Let's learn more about each key component of educational benefit as we walk through a sample IEP agenda.



**The following key components constitute educational benefit and should build upon one another throughout the IEP:**

**1**  
Assessment

### Key Component 1: Assessment

An in-depth description of the student's functioning, strengths, abilities, needs, and achievements based on records, interviews, observations, and testing (RIOT).

**2**  
Present Levels

### Key Component 2: Present Levels

A description of student's current level of academic achievement and/or functioning performance.

**3**  
Identify Needs

### Key Component 3: Identify Areas of Need(s)

An analysis of a student's need(s) as identified by the IEP team and described in the present levels.

**4**  
Goals

### Key Component 4: Measurable Goals

Developed by the IEP team to address the areas of need as outlined in the student's assessment and present levels.

**5**  
Supports & Services

### Key Component 5: Supports and Services

An overview of the special education, related services, supplementary aids and services, and program modifications that are to be a part of the IEP in support of the student's individual needs.



## IEP Meeting Agenda SAMPLE

### Start of Meeting:

- Introduction
- Parental Rights and Procedural Safeguards
- Purpose
- Agenda Overview
- Meeting Logistics
- Grounding Activity

### Assessment

#### Eligibility

#### Present Levels of Performance

- Student's strengths
- Present levels of educational performance
- Pathway to High School Graduation

#### Areas of Need

#### Goals

#### Offer of a Free Appropriate Public Education (FAPE)

- Accommodations/Modifications
- Participation in Local & Statewide Assessments
- Special Education and Related Services
- Transportation
- Extended School Year (ESY)
- Parent Involvement
- Emergency Conditions

#### Closing the Meeting

- Sign in attendance
- Confirm agreement
- Create an action plan, if necessary



## Key Component 1: Assessment

During an initial or triennial/reevaluation IEP meeting, reviewing evaluation results is a foundational step in achieving educational benefit. This step helps the IEP team determine if the student requires special education services. The assessor(s) will present the evaluation results, and the IEP team will then determine whether the student meets the eligibility criteria for special education.

## EDUCATIONAL BENEFIT CONSIDERATIONS

- Are assessments completed in all areas related to the suspected disability?
- Do the assessments identify all of the student's needs?
- Is there a statement regarding how the student's disability affects their involvement and progress in the general education curriculum (or, for preschool, how the disability affects the student's participation in appropriate activities) ?
- Were a variety of assessment tools and strategies used to gather relevant functional, developmental, and academic information about the student, including information provided by the parent(s)?
- In the case of specific learning disability eligibility, do assessments include observations of the student's learning environment to document their academic performance and behavior in the areas of difficulty?
- Have the student's strengths been considered?
- Ensure that assessments and other evaluation materials:
  - ☐ are not racially or culturally discriminatory.
  - ☐ are in the child's native language or other mode of communication. According to **California Education Code**, assessments must be "provided and administered in the language and form most likely to provide accurate information on what the student knows and can do academically, developmentally, and functionally, unless it is not feasible to provide or administer."



## IEP Meeting Agenda SAMPLE

### Start of Meeting:

- Introduction
- Parental Rights and Procedural Safeguards
- Purpose
- Agenda Overview
- Meeting Logistics
- Grounding Activity

### Assessment

#### Eligibility

#### Present Levels of Performance

- Student's strengths
- Present levels of educational performance
- Pathway to High School Graduation

### Areas of Need

#### Goals

#### Offer of a Free Appropriate Public Education (FAPE)

- Accommodations/Modifications
- Participation in Local & Statewide Assessments
- Special Education and Related Services
- Transportation
- Extended School Year (ESY)
- Parent Involvement
- Emergency Conditions

### Closing the Meeting

- Sign in attendance
- Confirm agreement
- Create an action plan, if necessary



## Key Component 2: Present Levels

Present levels describe what the student is currently able to do and uses measurable data to identify where they face challenges. This key component ensures the “individualized” aspect of the Individualized Education Program. Present levels highlight the student's strengths, preferences, and areas of need, providing a baseline for setting measurable goals. These levels are updated at least annually to reflect the student's current abilities and serve as the foundation for all decisions within the IEP. Consider using current assessment data (e.g., initial and re-evaluation assessments), as well.

## EDUCATIONAL BENEFIT CONSIDERATIONS

- Do the present levels contain data/information from a variety of sources, including parents/guardians, students, and teachers?
- Do the present levels clearly reflect the student's performance in the educational setting?
- Do the present levels reflect all needs identified in the assessments?
- Does data support the student's need for a behavioral goal if appropriate, or has an assessment been completed to initiate a Behavior Intervention Plan (BIP)?





## IEP Meeting Agenda SAMPLE

### Start of Meeting:

- Introduction
- Parental Rights and Procedural Safeguards
- Purpose
- Agenda Overview
- Meeting Logistics
- Grounding Activity

### Assessment

#### Eligibility

#### Present Levels of Performance

- Student's strengths
- Present levels of educational performance
- Pathway to High School Graduation

### Areas of Need

#### Goals

#### Offer of a Free Appropriate Public Education (FAPE)

- Accommodations/Modifications
- Participation in Local & Statewide Assessments
- Special Education and Related Services
- Transportation
- Extended School Year (ESY)
- Parent Involvement
- Emergency Conditions

### Closing the Meeting

- Sign in attendance
- Confirm agreement
- Create an action plan, if necessary

## Key Component 3: Identify Areas of Need

The IEP team identifies the student's needs by analyzing assessment data, present levels of performance, and input from all team members, including parents and, when appropriate, the student. Identified needs must directly result from the student's documented disability and reflect areas that require support in order for the student to access and make progress in the general education curriculum.

Once the student's needs are clearly identified, the IEP team will determine how those needs will be addressed. This may include developing specific goals, providing accommodations, implementing modifications, or other appropriate supports.

## EDUCATIONAL BENEFIT CONSIDERATIONS

- Are all identified areas of need clearly documented?
- Has parent/guardian input been documented during the discussion of identified needs?







## IEP Meeting Agenda SAMPLE

### Start of Meeting:

- Introduction
- Parental Rights and Procedural Safeguards
- Purpose
- Agenda Overview
- Meeting Logistics
- Grounding Activity

### Assessment

#### Eligibility

#### Present Levels of Performance

- Student's strengths
- Present levels of educational performance
- Pathway to High School Graduation

### Areas of Need

#### Goals

#### Offer of a Free Appropriate Public Education (FAPE)

- Accommodations/Modifications
- Participation in Local & Statewide Assessments
- Special Education and Related Services
- Transportation
- Extended School Year (ESY)
- Parent Involvement
- Emergency Conditions

### Closing the Meeting

- Sign in attendance
- Confirm agreement
- Create an action plan, if necessary



## Key Component 4: Measurable Goals

Each area of need documented in the present levels and related to the student's disability must be addressed within the IEP document. According to California Education Code, each child's IEP must contain a statement of measurable annual goals, including academic and functional goals, designed to do the following:

- Meet the needs of the individual that result from the disability, enabling the pupil to be involved and make progress within the general education curriculum.
- Meet each of the individual's other educational needs that result from the disability.



**Important fact:** Numerous studies have shown that students perform significantly higher if educators hold high expectations and goals based on grade-level standards.

## EDUCATIONAL BENEFIT CONSIDERATIONS

- Are there goals and objectives for each area of need, if appropriate?
- Are the goals based on the student's grade level standards?
- Does the baseline directly correlate with the goal?
- Are the goals and objectives/benchmarks measurable?
- Do the goals and objectives/benchmarks enable the student to be involved and progress within the curriculum?
- Are all other educational needs resulting from the disability addressed?
- If the student is an English learner, are the goals and objectives/benchmarks linguistically appropriate?
- Is the person(s) primarily responsible for implementing the goals and objectives/benchmarks and monitoring progress clearly identified?
- In non-assessment years, are present levels of academic and functional performance extensive enough to confirm areas of need and the student's current levels/baselines?
- Are goals written to enable the student to participate and make progress in the general education curriculum?
- Are goals updated from year to year based on student progress?
- Did the student make progress towards the prior year goals, and is progress documented?

IEP Meeting Agenda SAMPLE
<b>Start of Meeting:</b> <ul style="list-style-type: none"> <li>• Introduction</li> <li>• Parental Rights and Procedural Safeguards</li> <li>• Purpose</li> <li>• Agenda Overview</li> <li>• Meeting Logistics</li> <li>• Grounding Activity</li> </ul>
<b>Assessment</b>
<b>Eligibility</b>
<b>Present Levels of Performance</b> <ul style="list-style-type: none"> <li>• Student's strengths</li> <li>• Present levels of educational performance</li> <li>• Pathway to High School Graduation</li> </ul>
<b>Areas of Need</b>
<b>Goals</b>
<b>Offer of a Free Appropriate Public Education (FAPE)</b> <ul style="list-style-type: none"> <li>• Accommodations/Modifications</li> <li>• Participation in Local &amp; Statewide Assessments</li> <li>• Special Education and Related Services</li> <li>• Transportation</li> <li>• Extended School Year (ESY)</li> <li>• Parent Involvement</li> <li>• Emergency Conditions</li> </ul>
<b>Closing the Meeting</b> <ul style="list-style-type: none"> <li>• Sign in attendance</li> <li>• Confirm agreement</li> <li>• Create an action plan, if necessary</li> </ul>



## Key Component 5: Supports and Services

Goals drive services and additional support—not eligibility. Once the IEP team has agreed upon goals, the next step is to determine how to best meet these goals. Supports and services should allow the student to be involved and progress in the grade-level content standards, to participate in extracurricular/nonacademic activities, and to participate with nondisabled peers while working toward IEP goals.

## What is the difference between a service and a support?

Services documented in the IEP are provided directly to the student to guide their progress toward agreed-upon goals. Supplementary supports are provided to assist the student or the personnel at the school; they may include consultation support to a teacher or training for staff or parents.

### Supports and services can include:

- Accommodations and modifications
- Participation in local and statewide assessment
- Special education and related services
- Nonacademic and extracurricular activities
- Transition planning
- Transportation
- Extended school year (ESY)

**EDUCATIONAL BENEFIT CONSIDERATIONS**

- Are all accommodations and modifications appropriate based on the student's needs?
- If needed, have all assessment accessibility features been discussed and documented?
- If the student requires alternate assessment, has a rationale been provided?
- Are direct and/or consultation services connected to the IEP goals?
- Have the following details been specified for both supplementary aids and services, as well as for special education and related services: provider, frequency, duration, start/end dates, location, and associated goals and areas of need?
- Are services reasonably sufficient in frequency and duration to support progress in all the goals?
- Is there clarity amongst all team members, including the parent, as to when, where, and how often special education and related services will be delivered?
- Are the services delivered in the general education setting to the greatest extent possible given the student's needs?
- Has the team identified any transition point(s) that must be addressed?
- If appropriate, are supports/strategies clearly identified to support identified transition points?

# Follow-up and Implementation after the IEP

The Individualized Education Program (IEP) meeting is a collaborative effort between educators and parents intended to create a tailored educational plan that meets the unique needs of the student. However, the true success of an IEP lies in its execution. Effective follow-up and implementation are crucial in ensuring that educational plans and support systems established during an IEP meeting are successfully put into action. Without proper follow-up, the plans discussed may remain appropriate but unfulfilled ideas, leading to a gap between a student's needs and the support they actually receive.

This section will review the following elements of the “After the IEP” process:

## ■ Processing the IEP Meeting Experience

- ☐ Reflecting on the IEP (collecting and analyzing feedback)
- ☐ Expressing Gratitude After an IEP

## ■ Taking Action Post-IEP

- ☐ Following Up on Action Items
- ☐ Understanding Roles and Responsibilities

## ■ Communication and Collaboration

- ☐ Ensuring Effective Communication

## ■ Implementation and Progress Monitoring

- ☐ Implementing the IEP
- ☐ How Do We Progress Monitor?

## ■ Additional Support

- ☐ Additional Resources





## Reflecting on the IEP: A Continuous Improvement Approach

Now that the Individualized Education Program (IEP) meeting has concluded, it's time to reflect and gather feedback. Preparing for and conducting an IEP meeting takes significant effort, and collecting feedback and reflecting on the process can help:

- deepen your understanding of the IEP process,
- strengthen trust and collaboration with team members,
- support student-centered planning,
- enhance the implementation of the IEP, and
- encourage continuous improvement.

Seeking feedback from others on the IEP team (i.e., parent(s), educators, and if appropriate, the student) will help us learn from one another and adjust our practices as needed. It also helps reinforce a culture of valuing each other, highlighting accomplishments, building relationships, and addressing biases. Furthermore, reflecting on our process fosters a culture of [continuous improvement](#), as we analyze, understand, and address any gaps in our practice.

When asking IEP participants for feedback, be specific about what input would be most helpful. For example, we may be interested in participants' perspectives on procedures, logistics, and communication throughout the IEP process, as well as their experience with the support they received. This feedback helps us improve our practices.

## Ways to Gather Feedback

Here are several effective ways to collect feedback after an IEP meeting and throughout the school year:

- Surveys or questionnaires
- Follow-up meetings
- Phone calls
- Email
- Parent-teacher conferences
- Home-school communication logs



## Collecting Feedback

Reflect on your experiences during the IEP meeting. One way to do so is through reflective writing or journaling, which allows you to analyze your experience, explore its impact, and consider how to apply your new knowledge in the future.

### Below are a few questions to get started:

- How am I feeling as a result of the meeting?
- What did I expect to happen at the meeting?
- What actually happened?
- What am I proud of that occurred during the IEP meeting?
- What do I want to remember for the next IEP meeting?

**Let's dive deeper using the feedback focus areas.** Regular self-reflection helps refine your approach and improve team collaboration, leading to better student outcomes. Remember, the goal is not perfection, but continuous improvement in supporting students and their parent(s).

Using the reflective questions below after each IEP meeting will help guide your continuous improvement. By considering areas like satisfaction, communication, and progress monitoring, you'll enhance your skills and create more productive, student-centered meetings.



### GENERAL SATISFACTION AND COMMUNICATION

Reflect on participants' overall experience and level of contentment with the IEP process, including how effectively they felt information was shared.

- What aspects of the meeting went well and what could have been improved?
- Did I communicate effectively with all team members, including parents and educators, to ensure clarity about the student's progress and IEP goals?
- What adjustments can I make to improve my approach in future IEP meetings?



## SUPPORT AND RESOURCES

Reflect on how well individuals felt supported throughout the IEP journey, including by being given access to resources and information.

- Did I provide team members with sufficient information and preparatory materials ahead of the IEP meeting?
- Did I provide relevant resources or information to support the educators and families in implementing the IEP?
- Did I offer clear guidance on how team members can access additional support for the student, such as district programs or community resources?



## IEP PROCESS UNDERSTANDING

Reflect on how well individuals understood each stage of the IEP process.

- Did I clearly explain the IEP process and procedural safeguards to all participants in a way they understood?
- Did I ensure the team understood the student's IEP goals, accommodations, and services and how they are designed to meet the student's needs?



## PARTICIPATION AND INCLUSION IN THE IEP PROCESS

Reflect on how involved, respected, and valued the participant felt in planning and decision-making.

- Did I foster a collaborative environment that encouraged meaningful participation from all members of the IEP team?
- Did everyone have an opportunity to voice their concerns, ideas, and suggestions?
- How well did I handle disagreements or differing opinions during the IEP meeting?
- Did any unintentional biases surface and how could I address them in future meetings?
- How often are students involved in monitoring or discussing their IEP supports and services?



## IMPLEMENTATION OF IEP SUPPORTS AND SERVICES

Reflect on how participants felt about the clarity of the IEP plan, fidelity of implementation, accessibility of resources, and perception of impact.

- Based on this meeting, what specific actions will I take to support the student's progress?
- How will I monitor and document progress?
- During the meeting, did I address concerns or barriers related to the implementation of the IEP?



## PROGRESS AND FEEDBACK

Reflect on how well participants felt progress was tracked and communicated, and whether instructional adjustments were made as necessary based on collected data.

- How will I monitor and document progress?
- Did the team discuss how to monitor and share student progress on IEP goals?
- Did I provide feedback on the student's current progress and address how any lack of progress will be addressed in the future?

## Feedback for Strengthening IEP Outcomes

Feedback is essential for improving our practice and building stronger relationships with IEP team members. Below are sample surveys and feedback questions to use with your team after the IEP meeting.

### PARENT(S)

Parent feedback after an IEP meeting is crucial for understanding what worked well, identifying areas for improvement, and strengthening family participation to ensure the child's needs and goals are fully supported at home and school.

- [Parent Feedback Survey](#) - This parent survey consists of 10 questions drawn from various feedback focus areas.
- [Build Your Own Feedback Survey](#) - Use this bank of questions to build your own parent survey or revise the "grab and go" survey to focus on select areas of improvement.

## EDUCATORS

Educator feedback following an IEP meeting is essential for evaluating the effectiveness of the meeting, ensuring the plan is actionable, and fostering collaboration in support of the student's progress.

- [Educator Feedback Survey](#) - This educator survey includes 10 questions in multiple feedback focus areas.
- [Build Your Own Educator Feedback Survey](#) - Use this bank of questions to build your own educator survey or revise the “grab and go” survey to focus on select areas of improvement.

## STUDENTS

Student feedback after an IEP meeting is vital in understanding their perspective, ensuring the plan reflects their needs and goals, and empowering them to take an active role in their education.

- [Student IEP Feedback Survey](#) - This student survey includes 10 questions in multiple feedback focus areas.
- [Build Your Own Student Survey](#) - Use this bank of questions to build your own student survey or revise the “grab and go” survey to focus on select areas of improvement.

## Analyzing Your Feedback Data

The feedback data you've collected, both during and after the IEP meeting, may include your personal reflections, parent(s) surveys, etc. Look for themes and overall learnings in your data.

Take notice of both the successes and challenges. Does anything surprise you? Did perceptions differ between roles (e.g., parent(s) and educators)? What worked well? What is within your locus of control to adjust?

## FEEDBACK CONSOLIDATION

Gather the feedback you've collected during and/or after the IEP meeting. This data may include your personal reflections, parent surveys, etc. Look for themes in your data and overall learnings. Moving forward, identify the area(s) in which you'd like to see growth, then brainstorm conditions and strategies to achieve this growth. Use the following page to record the areas of growth you've identified and the strategies that will help you achieve them.

## GENERAL SATISFACTION & COMMUNICATION

Overall contentment or experiences of an individual, including how they felt information was shared.

## SUPPORT & RESOURCES

How individuals felt supported throughout the IEP journey and their access to resources and information, as needed.

## IEP PROCESS UNDERSTANDING

The understanding by individuals throughout each stage of the IEP process.

## PARTICIPATION & INCLUSION IN THE IEP PROCESS

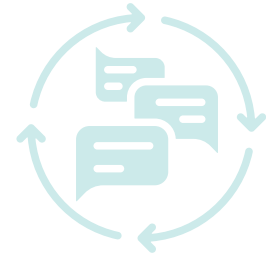
The involvement, respect and value the participant felt in planning and decision-making throughout the IEP process.

## IMPLEMENTATION OF IEP SERVICES AND SUPPORTS

Clarity of the IEP plan, fidelity of implementation, accessibility of resources and perceptions of impact.

## PROGRESS & FEEDBACK

Processes related to tracking and communicating progress and making instructional adjustments as necessary based on data collected.



1st area to grow

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Conditions & strategies to support growth

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2nd area to grow

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Conditions & strategies to support growth

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## Expressing Gratitude

Expressing gratitude after an IEP meeting helps build trust, strengthen relationships, and acknowledge the time and effort each team member contributed. Practicing gratitude fosters a positive and collaborative atmosphere, reinforcing the shared commitment to supporting the student's success. It can also boost morale, enhance teamwork, and encourage continued engagement in the IEP process. Simple gestures like a [thank-you email](#), a handwritten note, or verbal appreciation during follow-ups can go a long way in recognizing contributions and maintaining a supportive, student-centered team.

## Following up on Action Items

Consider using an [action plan](#) template to outline post-IEP meeting tasks, ensuring clarity and accountability. This may include actions related to transitions, communication, or addressing any unresolved questions. If consent was not provided, are areas of agreement and disagreement clearly documented? Have next steps for unresolved questions been identified, if applicable?

IEP Action Plan			
Action Plan for:			
Date:			
Task: (what needs to be done)			
Who: (will work on it/complete it)		Date needed	
What supports are necessary to complete the task(s)?			
Additional notes:			
Date completed:			
Task: (what needs to be done)			
Who: (will work on it/complete it)		Date needed	
What supports are necessary to complete the task(s)?			
Additional notes:			
Date completed:			



## Understanding Roles and Responsibilities

Clearly defining roles and responsibilities after an IEP meeting is essential for effective implementation. Each team member is important in the implementation of the IEP, and by understanding and fulfilling their respective roles, they will contribute to the student's success.

The High-Quality IEPs Project has developed tailored checklists for parents, students, educators, and administrators, detailing key steps before, during, and after IEP meetings. For the purpose of this section, focus on the “After the IEP” portion of each checklist to ensure effective follow-through and student support. These checklists can be adapted to fit local educational agency (LEA) requirements and district procedures to best support students.

- [IEP Planning Checklist for Special Education Providers](#)
- [IEP Planning Checklist for Administrative Designees](#)
- [IEP Planning Checklist for General Education Teachers](#)
- [IEP Planning Checklist for Parents](#)
- [IEP Planning Checklist for Students](#)


**Additional resource:** [Understanding Roles and Responsibilities After the IEP](#)

### Understanding Roles and Responsibilities

after the IEP

Clearly defining roles and responsibilities after an Individualized Education Program (IEP) meeting is essential for effective implementation. Each team member is important to the implementation of the IEP, and by understanding and fulfilling their respective roles, they will contribute to the student's success.

The High Quality IEPs Project has curated checklists to support parents, students, special education providers, general education teachers, and administrative designees in completing important steps before, during, and after the IEP meeting. However, for the purpose of this section, we will highlight activities after the IEP meeting. Please share the lists below, as they may be useful to others participating in the IEP journey.




**Consider customizing the checklist to accommodate local procedures:**

Use the checklists as a starting point, customizing to suit the specific requirements of your local educational agency (LEA). Add specific processes as necessary to remind each team member of their role and responsibilities.

**IEP Planning Checklist (special education provider edition)**

**After**

- ☐ Ensure that the IEP has been consented to by the parent/guardian. If they haven't consented, ensure there is follow-up.
- ☐ If agreements were made to follow up on any items, ensure those tasks are assigned and completed.
- ☐ Contact the Special Education Department if you need support with any items requiring follow-up.
- ☐ If the parent has requested the IEP be translated, ensure it is translated and provided to the parent in a timely manner.
- ☐ Ensure all service providers and teachers of the student receive a copy of the IEP, and understand their role in implementation of the IEP.
- ☐ Communicate with the parent/guardian regularly.
- ☐ Ensure that Progress Reports are completed and sent to parent/guardian at the intervals agreed upon in the IEP.
- ☐ If the student is not making the anticipated progress, work with the IEP team to follow-up.



Staying in contact after an IEP meeting is essential in maintaining open communication and collaboration between administrators, educators, parent(s), and students. This ongoing communication ensures that everyone is informed about the student's progress, achievements, and challenges, as well as any adjustments needed to support the student's educational journey. Regular communication helps keep the IEP effective and responsive to the student's needs, fostering a strong partnership focused on their success. Let's consider ways to support communication after the IEP meeting.

## Educators

### COMMUNICATION AND COLLABORATION

- Meet/check in with general education teachers and service providers to clarify their roles in implementing the IEP. Maintain ongoing communication throughout the IEP process.
- Document consultation among IEP team members.
- Provide district staff with a copy or summary of the IEP (e.g., "IEP at a Glance").
- Communicate progress to the IEP team, including parent(s), at least as frequently as for students without disabilities.
- Send brief surveys to gather educator feedback on the IEP process, such as the [Educator Feedback Survey](#) or [Build Your Own Educator Feedback Survey](#). Based on feedback, be sure to:
  - ☐ document and address any concerns raised, and
  - ☐ use survey feedback to adjust the IEP process as needed.

### PROGRESS MONITORING AND DATA COLLECTION

- Schedule regular meetings to review student progress.
- Maintain objective data documentation beyond teacher observation or anecdotal information.
- Clearly identify relevant settings or contexts for data collection.

### SERVICE COORDINATION

- Share service providers' schedules and provide updated schedules if changes occur.
- Arrange any necessary training or professional development for staff regarding supports, services, and accommodations/modifications.

## DOCUMENTATION AND PROGRESS REPORTING

- How will I monitor and document progress?
- Did the team discuss how to monitor and share student progress on IEP goals?
- Did I provide feedback on the student's current progress and address how any lack of progress will be addressed in the future?

## Parent(s)

- Maintain ongoing communication with parent(s).
  - Consider keeping a log of all parent communications, using a form such as the [Parent-Teacher Communication Template](#).
- After meetings, follow up with parent(s) via email or phone to summarize outcomes, review next steps, and answer any questions.
- Provide communication and documents in the parent's native language whenever possible, and arrange interpretation as needed.
- Share any schedule changes and/or service provider changes based on local procedures.
- Send brief surveys to gather parent(s) feedback on the IEP process, their child's progress, and any concerns. Examples include the [Parent Feedback Survey](#) or [Build Your Own Parent Feedback Survey](#). Based on feedback, be sure to:
  - document and address any concerns raised, and
  - use survey feedback to adjust the IEP process as needed.



## Students

- Follow up with the student to make sure they understand their IEP or updates to their IEP.
- Review with the student their accommodations and modifications.
- Share schedule for services, if applicable. If there are any services that have changed, provide an updated schedule.
- Have student take a brief survey about their experience with the IEP process. Examples include the [Student Feedback Survey](#) and [Build Your Own Student Survey](#).
- Hold regular check-ins with the student as appropriate to discuss their progress. Consider using a [Student IEP Goal Progress Worksheet](#) for these check-ins.



**Remember to document!** Documenting communications throughout IEP implementation fosters transparency, ensures accountability, and provides a clear record to address any future questions.

## Implementing the IEP

Effective implementation of an IEP is critical in ensuring that students with disabilities receive appropriate support and services to succeed academically. This can take place through both [reports of progress and progress monitoring](#).



### Report of Progress vs. Progress Monitoring

Both progress monitoring and a Report of Progress are essential tools for tracking a student's educational progress. They serve related but distinct purposes in special education. The table below compares these two means of reporting:

	<b>Report of Progress</b> (required by IDEA)	<b>Progress Monitoring</b> (data used for Report of Progress)
<b>Purpose</b>	To formally communicate the student's progress toward IEP goals as required by IDEA	Systematic and ongoing data collection to assess whether supports and services are effective in meeting IEP goals and accessing the general education curriculum. This data informs the Report of Progress.
<b>Frequency</b>	<a href="#">Provided periodically</a> to the parents (e.g., through quarterly reports concurrent with the issuance of report cards)	Conducted frequently (e.g., weekly, biweekly), depending on student needs and goals
<b>Data Collection</b>	Summarizes data collected through progress monitoring to document goal progress or needs	Ongoing data collection, such as <a href="#">formative</a> and <a href="#">summative</a> assessments and observations. Used to adjust instruction as needed and inform Report of Progress.
<b>Primary Audience</b>	Primarily for parents and IEP team members	Primarily for educators
<b>Content</b>	A high-level summary of progress, indicating how the student is advancing towards goals	Detailed data on a student's performance. Used to inform immediate instructional adjustments and effectiveness of supports and services.



Regular [progress monitoring](#) is a key component of the implementation process, allowing educators to track student growth, assess the effectiveness of interventions, and make data-driven adjustments to instruction. By consistently evaluating and refining the IEP, schools can better meet each student's unique needs, promote their development, and maximize their potential for success. Learn more about progress monitoring by clicking the image below.


**High Quality IEPs**  
working together for student success

## How Do We Progress Monitor?

We can [progress monitor](#) many parts of the IEP, including measurable annual goals, supports and services, and accommodations/modifications. Below is an overview of strategies to systematically track IEP implementation, which should become part of your routine. Consistent progress tracking can be achieved through observations, work samples, and ongoing data collection throughout the implementation year.



### START BY VERIFYING YOUR TARGET

Understand the specific performance criteria you are monitoring to determine the best methods to measure progress.

### DECIDE ON MONITORING METHODS AND DATA COLLECTION TOOLS

The IEP team must decide what tools and strategies are necessary for collecting data. This includes the type of data that will best align with the progress being monitored. Implementing structured approaches with both qualitative and quantitative data allows for a comprehensive understanding of student progress.





### DETERMINE FREQUENCY AND TIMING

Determine how often progress will be measured and recorded and by whom.

### IMPLEMENT MONITORING

Once implementation has begun, it's time to monitor according to a schedule and with the designated monitoring tools.





### COMPILE AND ANALYZE DATA

Organize the data in a systematic way, such as with charts, graphs, and progress monitoring tools, to track performance over time. Look for trends, improvements, and/or areas of concern.

### USE DATA TO GUIDE DECISION MAKING

Use analyzed data to adjust and guide decision making related to instruction, goals, supports and services as decided by the IEP team.



Below are resources to support progress monitoring:

- [IEP Implementation: Monitoring the Progress of Measurable Annual Goals](#)
- [IEP Implementation Monitoring the Individual Transition Plan \(ITP\)](#)
- [IEP Implementation: Monitoring of Supports and Services: Accommodations and Modifications](#)
- [IEP Implementation: Monitoring of Supports and Services: Participation in Local and Statewide Assessments](#)
- [IEP Implementation: Monitoring of Supports and Services: Indirect and Direct Special Education and Related Services](#)

### Additional Resources

Below are additional resources, as well as potential partners, to support IEP teams in fostering student-centered, collaborative meetings and processes.

- [CADRE](#)
- [Family Empowerment Centers](#)
- [Family Involvement & Partnerships](#)
- [P2P website](#) and [brochure](#)

**Your feedback is vital as the user of this handout.  
Please share your feedback on this [survey](#).**