



Special Education Provider Checklist For IEP Meetings

This is a curated checklist for before, during, and after an Individualized Education Program (IEP) team meeting.

Why is this important?

The Individuals with Disabilities Education Act (IDEA) requires “not less than one special education teacher of the child, or where appropriate, not less than one special education provider of the child.” CFR § 300.324 In some districts, this person may be referred to as the “case manager.” For the purpose of this checklist, case manager considerations are also included.

Before

- ☐ Review the student’s current IEP, if applicable.
- ☐ Know and understand timelines associated with special education.
- ☐ Coordinate date(s) with staff IEP team members for the parent/guardian to consider to hold the IEP meeting. If appropriate, and agreed upon, invite agencies.
- ☐ Send the IEP invitation to the parent/guardian with enough time to consider their schedule.
- ☐ Be familiar with the acronyms used in Special Education.
- ☐ Be ready to speak about the student’s growth and strengths. Consider using the Building on My Strengths protocol. Refer the family to the Parent version of this document to complete prior to the meeting.
- ☐ Understand how the student’s disability affects involvement and progress in the general curriculum. Consider what characteristics might be present and how they impact the student’s access. This may require connecting with staff that interact with the student regularly.
- ☐ Review how the student is making progress by staying connected with the general education teacher(s) and special education service provider(s) as applicable. This could include gathering relevant work samples and data related to:
 - ☐ assessments
 - ☐ health
 - ☐ accommodations/strategies the student uses in class, which allow the student to best represent their knowledge and skills
 - ☐ grades
 - ☐ vocational skills
 - ☐ progress monitoring data from instructional interventions
 - ☐ communication
 - ☐ social-emotional needs
 - ☐ gross/fine motor skills
 - ☐ progress towards current IEP goals
 - ☐ adaptive/daily living skills



Before

Continued

- ☐ If there are behavioral concerns, be prepared to discuss concerns and the outcomes of positive behavioral interventions that have been tried.
- ☐ Assist in coordinating the completion of the final Progress Report from the current IEP.
- ☐ Connect with the parent/guardian to see if they have any questions, concerns, recommended goals to be included on the agenda and considered at the IEP meeting.
- ☐ Prepare a draft of the IEP forms for which you are responsible. Remember all IEP forms are drafts until all members of the IEP, which includes parent/guardian, have had the opportunity to contribute to its development.
- ☐ Be familiar with the student and their needs in order to facilitate conversations during the IEP meeting.
- ☐ If any IEP team members cannot attend, ensure that the Excusal Form is completed and consented to by the parent. Reschedule if the parent does not agree to the excusal.
- ☐ Read and understand the parents' rights/procedural safeguards. You may be asked to explain them.
- ☐ Arrange for interpreters, if needed
- ☐ Send reminders to all IEP team members, especially the parent, about the upcoming meeting.

During

- ☐ Ensure the environment is set up to promote collaboration and comfort.
- ☐ Start the meeting on time, and establish a meeting timeframe.
- ☐ Ensure that each member of the IEP team has the opportunity to contribute to the agenda.
- ☐ Follow the agenda during the meeting.
- ☐ Avoid the use of jargon.
- ☐ Facilitate discussion that is productive and suggest a break, if needed.
- ☐ Assist the IEP team to keep the needs of the student the focus of all decision-making.
- ☐ Ensure that all concerns are noted and addressed.
- ☐ Ensure all of the sections of the IEP document are completed. For each area of identified need, check to make sure there is a goal to address it.



During Continued

- ☐ Consider the student's school day, assume placement in the general education environment, and determine when a student must be removed from that environment. Student's placement should be in the Least Restrictive Environment (LRE).
- ☐ If more than the allotted time is needed to complete the IEP, schedule a follow-up meeting.
- ☐ Ensure the parent/guardian knows who to contact if they have questions following the meeting.
- ☐ Sign the IEP signature page.
- ☐ Ensure the parent/guardian/adult student receives a copy of all IEP documents and reports at the conclusion of the IEP meeting.

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.

Please note that although this checklist offers important suggestions, ultimately you should consult your district procedures to ensure you are following the established protocol.