

Custom IEP Meeting Success Planner™

A parent-friendly planner to organize concerns, goals, questions, accommodations, and next steps before your child's IEP meeting.

PRINTABLE

IEP MEETING

PARENT TOOL

Use this planner to:

- ☐ Clarify your concerns before the meeting
- ☐ Plan what to ask for with confidence
- ☐ Track decisions and follow-up after the meeting

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Important Disclaimer

This workbook is a planning and organization tool for parents and caregivers.

This planner is for educational and organizational purposes only. It is not legal advice, medical advice, therapeutic advice, or a guarantee of IEP eligibility, services, accommodations, placement, or outcomes.

Always follow official guidance

Use your school district, state education agency, and qualified professionals for official rules and decisions.

Bring your own evidence

Use reports, evaluations, emails, progress notes, work samples, observations, and professional recommendations to support your requests.

You are the expert on your child

This planner helps you organize what you know so you can communicate it clearly.

How to Use This Planner

Move through the pages before, during, and after your IEP meeting.

1. Before the meeting

Complete the child profile, priorities, concerns, evidence organizer, and request planner.

2. During the meeting

Use the questions, scripts, agenda, and meeting notes pages to stay focused.

3. After the meeting

Use the decision tracker, follow-up email template, implementation tracker, and 30-day check-in pages.

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Child Profile

Keep essential information in one place.

Child name

Date of birth

School

Grade

Case manager

Primary teacher

Parent/caregiver

Phone/email

Disability category

Current plan type

Child strengths, interests, and motivators

What helps my child feel safe, calm, and successful

IEP Meeting Details

Use this page for each upcoming meeting.

Meeting date	Meeting time
Meeting location/link	Meeting type
Purpose of meeting	IEP due date

Team member	Role	Contact / notes

Parent Priorities

Start with the most important outcomes you want to address.

My top 3 concerns

1. Concern

2. Concern

3. Concern

My top 3 desired outcomes

1. Outcome I want to see

2. Outcome I want to see

3. Outcome I want to see

What Is Working

Identify supports and strategies that should continue.

Current supports that are helping

Strengths the team should build on

Positive routines, tools, or relationships

Progress I want the team to notice

What Is Not Working

Clarify where your child needs more support.

Skills or areas where my child is struggling

Supports that are not being implemented or are not enough

Patterns I notice at home or school

What I want the team to understand

Strengths & Needs Snapshot

A quick summary to guide the meeting conversation.

Area	Strengths	Needs / concerns

Current IEP Snapshot

Summarize what is already in the current IEP.

Current goals

Current services

Current accommodations

Current modifications

Related services

Placement or setting notes

Progress Review Worksheet

Use data and examples to discuss whether current goals are working.

Goal / skill area	Reported progress	Parent observation	Concern or question

Patterns I notice across progress reports, emails, grades, or behavior data

Parent Concern Builder

Turn your concerns into clear meeting language.

The concern I want to raise is...

This is affecting my child by...

The evidence or examples I have are...

What I am requesting from the team is...

The outcome I hope to see is...

Tip: Keep your statement clear, factual, and focused on your child's needs. You can bring this to the meeting or use it to guide your comments.

Accommodation Request Planner

Plan specific accommodations to request and why.

Need	Accommodation requested	Why it is needed	How it should be used

Accommodation Wording Bank

Parent-friendly phrases you can use in the meeting.

Copy-and-use phrases

- ☐ Can we add an accommodation for...
- ☐ Can we clarify exactly when and how this support will be provided?
- ☐ Can we document this in the IEP so everyone understands the expectation?
- ☐ What data will we use to know if this accommodation is working?
- ☐ Can we revisit this support in 30 days if it is not helping?
- ☐ Can the team explain why this request is being accepted or denied?

My custom accommodation wording

Services & Supports Request Planner

Use this when requesting services, related services, or additional support.

Support requested	Reason	Evidence	Team response / next step

Behavior & Regulation Concerns

Behavior and regulation needs that affect learning or safety

What triggers or patterns do I notice?

What helps my child recover or regulate?

What supports should be considered?

What data should the team collect?

Communication Concerns

Communication needs across school settings

How does my child communicate needs?

Where does communication break down?

What supports or visuals help?

What should staff know?

Sensory Needs

Sensory needs that affect access to learning

Sounds, lights, textures, movement, or crowded spaces that are difficult

Sensory tools or breaks that help

Times of day or settings with the most difficulty

Supports I want the team to consider

Executive Functioning Needs

Organization, planning, time, attention, and task initiation

Where my child gets stuck

Support needed for assignments or routines

Tools that might help

How the team can measure success

Academic Support Needs

Reading, writing, math, work completion, and instruction

Academic areas of concern

Examples of work samples or grades

Supports that help at home or school

Requests for instruction, accommodations, or services

Social-Emotional Support Needs

Belonging, peer interaction, anxiety, frustration, and confidence

Social-emotional patterns I notice

When my child needs adult support

What helps my child feel included

Requests for counseling, check-ins, or social support

Safety & Transition Support Needs

Safety, elopement, transitions, arrival, dismissal, and unstructured time

Safety concerns or transition problems

Times or locations of concern

Prevention supports needed

Emergency or response plan notes

Document Checklist

Gather documents that help support your concerns and requests.

- ☐ Current IEP
- ☐ Progress reports
- ☐ Recent evaluations
- ☐ Teacher emails
- ☐ Medical or therapy notes
- ☐ Behavior reports or incident notes
- ☐ Work samples
- ☐ Attendance records
- ☐ Grades or test results
- ☐ Parent notes from home
- ☐ Outside provider recommendations
- ☐ Previous meeting notes

Other documents to gather

Evidence Organizer

Connect each concern to examples, records, or observations.

Concern	Evidence I have	What it shows	Where it is saved

Questions to Ask the IEP Team

Bring this page to the meeting and check off what applies.

- ☐ What data shows whether the current IEP is working?
- ☐ Which goals have been met, partially met, or not met?
- ☐ What supports are being used consistently?
- ☐ What accommodations are not being used consistently?
- ☐ What does the team recommend and why?
- ☐ How will we track progress after this meeting?
- ☐ Who is responsible for each follow-up item?
- ☐ When will I receive the finalized IEP or meeting notes?
- ☐ Can we document that in the IEP?
- ☐ Can I receive prior written notice for that decision?

Parent Advocacy Scripts

Polite and firm language for difficult meeting moments.

When you need clarity

"Can you explain what that means in parent-friendly language?"

When you need documentation

"Can we add that to the IEP so it is clear for everyone?"

When the team says no

"Can you explain the reason for the denial and provide prior written notice?"

When you need time

"I would like time to review this before making a decision."

When the meeting gets off track

"I want to bring us back to my child's needs and the concerns we are here to address."

When you need follow-up

"Who will be responsible for this and when should I expect an update?"

Meeting Agenda Planner

Decide what you need to cover before the meeting starts.

Agenda item	Why it matters	Time needed	Completed?

IEP Meeting Notes

Use during the meeting to capture important details.

Date

Meeting type

Attendees

School/contact

Key discussion points

Decisions made

Questions I still have

Decision Tracker

Track what was accepted, denied, tabled, or needs follow-up.

Request / decision	Accepted	Denied	Follow-up needed	Notes

Follow-Up Action Plan

Leave the meeting with clear next steps.

Action item	Person responsible	Due date	Status

Follow-Up Email Template

Use this after the meeting to confirm decisions and next steps.

Subject: Follow-up from IEP meeting on [date]

Hello [Name], thank you for meeting today. I am writing to confirm my understanding of the decisions and next steps discussed during the meeting.

Decisions I understand were made

Follow-up items and due dates

Questions or corrections I want to include

Prior Written Notice Request Script

Use this page if you need a decision documented.

Parent-friendly script: "Please provide prior written notice explaining the decision, the reason for the decision, and the information the team used to make that decision."

Decision I want documented

Date requested and person contacted

Response received

Implementation Tracker

Track whether supports are actually happening after the meeting.

Support / accommodation	Who provides it?	How often?	Is it happening?	Notes

30-Day Check-In Tracker

Review progress about a month after the meeting.

What has improved?

What has not improved?

Which supports are working?

Which supports need revision?

What follow-up do I need to request?

Communication Log

Keep a record of school communication.

Date	Person	Method	Topic	Outcome / next step

Final Checklist Before the Meeting

Use this page the night before or morning of the meeting.

- ☐ I reviewed the current IEP.
- ☐ I wrote down my top concerns.
- ☐ I gathered documents and examples.
- ☐ I prepared my requests.
- ☐ I wrote my questions.
- ☐ I know who will attend.
- ☐ I have a place to take notes.
- ☐ I know what follow-up I need to ask for.
- ☐ I am ready to advocate calmly and clearly.

My one main goal for this meeting

You Are Prepared

A closing reminder for parents and caregivers.

You do not have to know every rule to be an important voice in the room. Your observations, questions, and concerns matter. Use this planner to stay organized, focused, and confident as you advocate for your child.

Before you leave the meeting, confirm

- ☐ What decisions were made.
- ☐ What is still undecided.
- ☐ Who is responsible for each next step.
- ☐ When you should expect updates or documents.
- ☐ How progress will be tracked.