

Mid-Valley Special Education Cooperative
IEP Meeting Procedures
Revised, August 15, 2016

In preparation for annual review season, we thought we would put together a few helpful reminders. We hope the meetings with your parents are positive and productive!

1. Three to four weeks prior to the scheduled IEP meeting with parents, the case manager should schedule an informal meeting with the members of the IEP team. At this meeting, they should discuss any suggested changes and goals so that the team may collaborate on these activities. These types of planning meetings are legally allowable and are very helpful to the team. That way, there are no surprises during the meeting with the parents. If there are anticipated difficulties or major changes, the MV administrator should attend these planning meetings, if possible. If not possible, the case manager should discuss these changes with the administrator in advance of the parent meeting.

If financial obligations are pending (e.g., assistive technology, specialized equipment, 1:1 assistance), it is imperative that these options be discussed with the administrator in advance of the meeting. Justification for the recommendation is required. The administrator will need to have a conversation with the appropriate district administrator prior to the parent meeting.

2. The case manager should invite the parents, district representatives, administrator and other team members with the Notification of Conference Meeting Notice. The Case Manager should also note if there are any changes in those who will be attending so that the Excusal Form can be completed and signed by the parent at the meeting. The district representative should receive an email or paper copy of the Notification.
3. The case manager is also responsible for documenting attempts to contact parents for the meeting.
4. The case manager should inform all of the related service providers about the date of the meeting, especially if there are any changes from the original plan. Also, notify all of the team members about when you plan to send the draft version to the parents, so they can include their information by that date as well. Everyone needs to update the previous IEP goals.
5. Two to three days before the parent meeting, send a draft copy of the entire IEP (not just goals), excluding the Services and Placement page and the additional notes page. For students 14 and older, send a copy of the draft transition plan. Also send updated previous goals.
6. Although you only send these pages, it is the case manager's responsibility to have a complete IEP ready for the meeting. The only thing that should be typed during the meeting are changes to the IEP and/or additional notes. The entire document is the case manager's responsibility.

7. Remember that any changes can be made to the IEP at the meeting, even though you may have sent the parents a draft of the IEP. Anyone can type in the changes or additions during the meeting. It may be the case manager, social worker, coordinator or any team member. It is best to make a plan for who will type at your planning meeting. (See #1.)
8. The additional notes pages are to be brief notes for any discussion of items that occur during the meeting that are not elsewhere on the IEP. They do not need to be verbatim notes of each person's statements or thoughts. They are just notes. At the end of the meeting, these notes should be read back to the group to assure their accuracy.
9. The case manager is responsible for making sure a room is available and there is a working computer, connected to a working printer. The computer needs to be up and running prior to starting the meeting. As a courtesy to parents, there should only be one open computer during the meeting, unless you are making appropriate changes.
10. It is very helpful to have an agenda for the meeting that is reviewed with the participants prior to beginning the meeting. And, parents should have a paper copy of the entire draft document to follow-along during the meeting. And, they should have a packet of the previous IEP's goal updates.
11. After strengths and during the present levels of performance overview, previous goals should be reviewed. These should be copied as a part of the IEP packet that is given to the parents, district representative, and copied for the student's main file.
12. Even though goals may have been sent to the parents prior to the meeting, they should be reviewed briefly at the IEP meeting.
13. At the end of the meeting, if there are no changes to the IEP, print a copy for the parents, the district, and a paper copy for the files. The district should have the original, signed copy.
14. If there are changes to be made to the IEP, note which pages are to be changed, reviewed, goals changed, or added on the Additional Notes Pages. Also add when the parents and districts can expect completed copies of the IEP. Give the parents a copy of that page. Parents and districts should leave the IEP meeting with the entire draft document.
15. It is the case manager's responsibility to make the necessary changes, complete the IEP, and send appropriate copies by the agreed date. The final IEP should be *mailed* if the final copy was not provided to the parents at the IEP meeting.
16. A paper copy of the completed IEP should be sent to the MV administrative office or the MJC office.
17. At the end of the meeting, it should be decided who will complete the FACTS form and any update forms for administration.

Goal Updates

1. It is the case manager's responsibility to inform the IEP team members about the due dates for the goal updates. It is also the responsibility of the case manager to send them to parents at the appropriate dates. Districts do not need goal updates throughout the year; only at the annual review.
2. If your program has report cards, the district should receive those report cards as frequently as they are sent to parents. They can be sent to the special education administrative offices.

Other

1. Individual TAs are generally written into IEPs as a related service.