

# Prep for Annual or Triennial Meeting IEP TOOL KIT

For my child's IEP meeting:

Annual \_\_\_\_\_ Triennial \_\_\_\_\_

\_\_\_\_\_  
(date)

\_\_\_\_\_  
(time)

\_\_\_\_\_  
(location)



AN OVERVIEW

# IEP Tool Kit Prep for Annual or Triennial Meeting

An Individualized Education Plan (IEP) is to be written so your student receives educational benefit. As you are a participant in developing the IEP, the following can help you to be an effective advocate for your child at the IEP meeting:

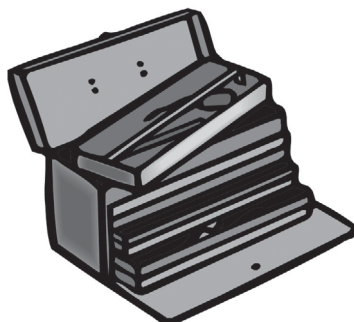
- Having information and data that supports what your student needs
- Being organized in your thoughts and with your documents
- Communicating in a manner that helps you get the information you need and have others listen

This IEP Tool Kit includes:

- Instructions on using the IEP Tool Kit
- Tips on organizing your child's school related papers
- A planning worksheet to use as you are organizing information for the IEP
- A tracking form to take to the IEP meeting with your parent concern statement and your specific requests or questions
- Resources so you can learn more about effective advocacy skills, developing an IEP and the special education process

As you prepare, keep in mind the quote from Maya Angelou:  
*"I did then what I knew how to do. Now that I know better, I do better."*

There is so much information available, it can seem overwhelming. Be gentle with yourself as you learn. Over time, you will feel more confident and knowledgeable.



# IEP Planning Steps

## Instructions for Using Tool Kit Forms

*Building an IEP starts with understanding a child's needs; it starts with a good assessment.*

### **STEP 1: INFORMATION – What information do I have? – page 4**

Gather all information that shows your child's needs, such as assessment reports, work samples, teacher comments, report cards, observations, progress on IEP goals (*from the year just ending*), and attendance and discipline records. If you don't have assessment reports that will be used at the IEP meeting, ask to have them before the meeting. To prepare for the discussion of assessments, some parents highlight different sections:

**Yellow** = need more clarification to understand

**Orange** = inaccurate information

**Green** = agreed need

Remember: If there are new assessments, you will decide if you agree or disagree with the assessments.

### **STEP 2: NEEDS & PARENT CONCERNS – What do I know from this information? – pages 7 & 8**

Make a list of your child's needs from the above information and note next to each need how you know this — what piece of information supports this need? Then write a statement about your concerns related to educational progress which you want this IEP to address.

### **STEP 3: PRIORITIZE – What is most important? – pages 7 & 8**

Prioritize the needs — high, medium, low

### **STEP 4: INTERVENTIONS – What might help my child? – pages 7 & 8**

Think about what may be needed at school. Special instruction may be needed to teach skills. Other areas may need an accommodation or modification. These may be a change in the environment, equipment, or expectations. The professional's job is to recommend interventions. Parents can suggest ideas and ask about ideas proposed by the professionals.

**STEP 5: QUESTIONS / REQUESTS – What do I still need and what do I want to request?** Take your Parent Concern Statement from Step 2 to the IEP meeting so it can be included in the IEP document (page 2, Parent Concerns). You may want to read/refer to it at the meeting as well.

Write down questions and requests to ask the IEP team. These might include:

- Clarifying any information you have
- Getting more information and data
- Better understanding the connection between the information you have and the needs you see.
- Learning about interventions: pros and cons of various approaches, which ones were not considered and why, which ones are evidenced-based
- Requesting an assessment or adding/changing something in the IEP

### **STEP 6: PREPARATION – What will I take to the IEP meeting? – pages 9 & 10**

- Our IEP Meeting Tracker forms for requests and questions and your Parent Concern Statement
- Your child's IEP binder for easy access to your records
- Any resources about special education or that support a request you are making

**IMPORTANT:** An Individual Education Plan is a plan to address your child's needs so that he or she can access the curriculum at school and receive **educational benefit**. Needs that affect education might include academic, cognitive, physical, emotional, social, and functional life skills. While your child may have other needs, schools are only responsible for educational needs.

# Organizing School-Related Papers

Getting organized will help you support your child and the school in meeting your child's unique needs. A binder containing your child's important papers will help you see trends and patterns and can improve your communication with the school. Creating a one-page summary of your child's strengths, interests, and needs to give teachers at the beginning of the year has proved helpful to many parents. Our "Getting Organized" Information Packet has more information.

## Create a One-Page Profile

Keep the profile to one page to make it easier for busy teachers to get the highlights of your child's IEP as well as some more personal attributes. Categories might include:

- Basic information: age, siblings, pets, interests, summer activities
- Medical: medication and any impact at school (i.e. not hungry at lunch, often thirsty, lethargy) and/or any physical limitations (i.e. seizure resulted in left side weak)
- Education: tutoring, remediation, school changes, IEP date, classroom accommodations
- Strengths and challenges

## Obtain and Organize Records

Check to see if you have the last two or three years of your child's records. If not, make a written request for your child's records, both the cumulative and Special Education files.

Once you have all the necessary papers related to the IEP, you are ready to sort and organize:

- Use a large 3-ring binder. Make sure you have a paper hole-punch too.
- File chronologically with the most recent on the top.
- Put something that reminds you of your child on the front cover such as a picture
- Put a school calendar and your Special Education Rights in the pockets.
- Use tabs to divide your papers into categories that best suit your needs (*suggestions*):
  - › **Contact information** for teachers, therapists, administrators, etc.
  - › **Annual IEP document and amendments:** This may include behavior intervention plans or transition plans.
  - › **Assessments:** School and independent and any other reports on your child. This includes IEP progress reports on goals.
  - › **Child's work:** Report cards, progress reports, test results, and work samples.
  - › **Copies/logs of all communication:** Letters, meeting notes, notices, emails, and phone calls to and from the school and others serving your child.
  - › **Statewide Test results.**
  - › **Medical summary:** A list of medications and dosages your child takes at home or at school (note any changes in the behavior, reaction, and dosage), and appointments.
  - › **Your observations:** Include notes or observations of your child pertinent to school.

# IEP Goals: Examples of Areas of Need & Sub-skills

*The following are a few examples of sub-skills in various areas that can be addressed as part of a student's education and IEP. **This is not a complete list, as sub-skills are numerous.** See also the California Common Core Standards document at <http://www.cde.ca.gov>.*

## Reading

- Fiction
- Non-fiction
- Fluency (how quickly and accurately text is read)
- Phonemic Awareness (manipulating sounds)
- Phonics (connecting letters to sounds)
- Vocabulary
- Comprehension
  - › Right-in-the-text answers (answer to the question is right in the text)
  - › Think-about-it answers (answer requires thinking and requires pulling together ideas in the text)

## Writing

- Mechanics/Editing: Spelling, punctuation, capitalization
- Content: connection of ideas in paragraphs and in entire composition; complexity of sentences and paragraphs
- Planning before writing

## Math

- Calculation (adding, subtracting, multiplying, dividing, decimals, fractions, formulas)
- Concepts (number sense, estimation, part to whole, etc.)
- Practical (telling time, making change, etc.)
- Word problems

## Study Skills

- Memorizing and studying for tests
- Planning long-term projects
- Time estimation for work completion
- Test preparation methods
- Organizing materials
- Self-monitoring
- Turning in completed work

## Communication

- Articulation (speech)
- Understanding what is heard via spoken words
- Expressing thoughts via words
- Pragmatics or understanding non-verbal language (body language, turn-taking, topic maintenance)

## Gross/Fine Motor

- Handwriting
- Cutting
- Body posture for desk work
- Strength to navigate
- Buttoning, zipping

## Social Emotional Behavior

- On task
- Avoiding work
- Blurting out
- Physical altercations
- Misuse of school equipment
- Seeking peer attention in negative way
- Emotional regulation
- Respect for authority

## Vocational/Transition to Adulthood

- Career skills
- Career awareness and exploration
- Employability skills and work habits
- Work experience

## Adaptive/Daily Living

- Hygiene
- Time management
- Safety
- Managing personal finances (making change, bank accounts...)
- Dressing for P.E. or outdoors

# IEP PREP CHECKLIST

- ☐ Current documents about my child are organized and in my binder.
- ☐ My child's areas of need are identified and listed on the Tool Kit form along with my concern statement and ideas for the IEP.
- ☐ I am familiar with what should be on each page of the IEP.
  - ☐ Page 1 section: "Describe how the student's disability affects involvement and progress in general curriculum (or for preschoolers, participation in appropriate activities)" will have a statement describing HOW the disability affects involvement and progress, NOT the WHAT the district is providing.
  - ☐ Pages 2 and/or 3 Present Level of Academic Achievement and Functional Performance: my concern statement will be entered and the data on my child is clear, specific and concise and reflects the skills at the time the IEP was written. Information can come from assessments, teacher observation, work samples etc.
  - ☐ Goals address each prioritized area of need related to how the disability affects education and dates are noted when progress reports will be given.
  - ☐ Each goal and baseline (related to the goal) is specific, measurable and anyone reading them can form picture of what the student would be doing or not doing.
  - ☐ If this is not your child's first IEP and a grade level skill in a specific area is not yet attained, goals are written to further increase or expand the same skill, and goals are only dropped if the IEP Team (including the parent) agree further work on a weak skill area is not a priority or beneficial.
  - ☐ Accommodations listed for prioritized areas of need describe the specific conditions when these accommodations must be provided so my student can access grade level curriculum.
  - ☐ Modifications listed for subject areas if my student is below grade level enough that a different grade level curriculum in that subject area is needed.
  - ☐ Supports and services listed for staff on behalf of my student if these are needed for my student to have educational benefit.
  - ☐ Frequency and duration for services is enough so that goals are reasonably calculated to be reached and provide educational benefit.
  - ☐ The Special Factors page represents each need such as a Behavior plan or Assistive Technology
  - ☐ A transition plan is in place before my student turns 16 and specifically addresses needs related to employment, post-secondary education and independent living.
  - ☐ The location, duration and frequency of services are specified so as to provide educational benefit and the continuum of service options is reviewed.
- ☐ If information presented at the meeting doesn't show progress, discussion should determine what might be needed or changed:
  - More assessment to understand why there isn't progress
  - Change in instructional strategy or location of services
  - More or different services



# IEP Planning Worksheet

Meeting Date: \_\_\_\_\_

Using the assessment information you have gathered (Step 1), use this worksheet to clarify your thinking. Below are some examples. A blank worksheet is provided on the next page (page 8). Then transfer your top priorities to the sheet you take to the meeting (page 9).

**My concerns relevant to educational progress: Increase independence and minimize prompts by adults.**

## STEP 4

## STEP 3



Priority	What are my child's needs, challenges, and strengths?	How do I know this? What data do I have?	What are some possible ideas for the IEP? Goals, accommodations, modifications, services
low	Spelling mistakes	Classroom weekly quiz and RSP evaluation (page 6)	IEP goal
medium	Can't take clear notes during lectures	Work samples; score on OT handwriting test, page 3	Instruction in key concept note-taking, peer note taker, provide teacher lecture outline
medium	Spinning in circles at the playground and at storytime	Report by teacher, playground aide, and other children	OT suggests sensory activity with peer buddy
high	Reads slowly with mistakes	Audiotape of reading at home; test score of reading fluency — see RSP evaluation, page 4	More time in Resource? Different reading program that is evidence-based reading fluency goal
high	Flunks chapter tests	Online grading report and tests	Teach how to memorize; provide study sheets
high	Doesn't follow teacher directions	Teacher notes home Feb. 6, 22, Mar. 5; behavior warning from principal Mar. 7, 11	NO IDEAS!!
low	STRENGTH: Works well with peers	Teacher report	Use of peer study groups and tutors
medium	Ability to draw pictures	Work samples	Allow drawings to show understanding

Data might include work samples, test scores, discipline and attendance records, observation logs

# IEP Planning Worksheet

Meeting Date: \_\_\_\_\_

Steps 2, 3 - Information Review — Step 4 - Problem Solve

My concerns relevant to educational progress:

**STEP 4**

**STEP 3**

**STEP 2**

Priority	What are my child's needs, challenges, and strengths?	How do I know this? <i>What data do I have?</i>	What are some possible ideas for the IEP? <i>Goals, accommodations, modifications, services</i>

Data might include work samples, test scores, discipline and attendance records, observation logs



# IEP Meeting: Tracking Questions & Requests

Meeting Date: \_\_\_\_\_

Steps 5, 6 – Transfer the information from the IEP Planning Worksheet (pages 7 and 8) and take this sheet to the IEP meeting with you.

My concerns relevant to educational progress:

**STEPS 5 & 6**

Priority	Questions to ask and requests to make	Based on data from...	Covered in meeting?	Result/Decision Follow-up?

**Reminder:** Your Parent Concern Statement should be noted on page 2 of your child's IEP.



# IEP Meeting: Tracking Questions & Requests

Meeting Date: \_\_\_\_\_

Steps 5, 6 – Transfer the information from the IEP Planning Worksheet (pages 7 and 8) and take this sheet to the IEP meeting with you.

My concerns relevant to educational progress:

**STEPS 5 & 6**

Priority	Questions to ask and requests to make	Based on data from...	Covered in meeting?	Result/Decision Follow-up?

**Reminder:** Your Parent Concern Statement should be noted on page 2 of your child's IEP.



## Selected Materials

- *All About Tests and Assessments: Answers to Frequently Asked Questions* (2014) – Peter Wright, Esq. & Pamela Wright
- *All About IEPs: Answers to Frequently Asked Questions about IEPs* (2010) – Peter Wright, Esq. & Pamela Wright
- *From Emotions to Advocacy: The Special Education Survival Guide* (2006) – Peter Wright, Esq. & Pamela Wright
- *Special Needs Advocacy Resource Book* (2008) – Rich Weinfeld & Michelle Davis
- *Working Together: A Parent's Guide to Parent and Professional Partnership and Communication Within Special Education* (2006) – Technical Assistance ALLIANCE for Parent Centers  
– access resource here:  
<http://www.matrixparents.org/wp-content/uploads/2015/06/Working-Together-A-Parents-Guide.pdf>
- *Steps to Success* – access resource here:  
<http://matrixparents.org/wp-content/uploads/2014/10/Steps-to-Success.pdf>
- *Special Education Rights and Responsibilities* (2011) – CASE and Disability Rights California:  
<http://www.disabilityrightsca.org/pubs/504001Ch01.pdf>
- *The Complete Guide to Special Education: Expert Advice on Evaluations, IEPs and Helping Your Child Succeed* (2010) – Linda Wilmschurst, Ph.D & Alan Brue, Ph.D
- *Nolo's IEP Guide: Learning Disabilities* (2011) – Lawrence Siegel, JD
- *The Complete IEP Guide: How to Advocate for Your Special Ed Child* (2011) – Lawrence Siegel

## Selected Websites (in addition to <http://www.matrixparents.org>)

Center for Parent Information & Resources, <http://www.parentcenterhub.org>

California Department of Education

- Main website, <http://www.cde.ca.gov/sp/se/>
- Positive Environment, Networks of Trainers (behavior), <http://www.pent.ca.gov>
- California Services for Technical Assistance & Training (CalSTAT), <http://www.calstat.org>
- Diagnostic Center North, <http://www.dcn-cde.ca.gov>

Wrightslaw, <http://www.wrightslaw.com>

Disability Rights California, <http://disabilityrightsca.org>

Tips for the IEP meeting can be found in our Advocacy packet and our Help! sheet, *How can I communicate better with my child's IEP team?*