

FRANCZEK

BEST PRACTICES FOR DOCUMENTING IEP TEAM MEETINGS

Guidance and Note-Taker Checklist

A practical framework for creating clear, accurate, and defensible records of IEP Team decision-making

CORE PRINCIPLE Effective IEP notes document the process, not merely the outcome. They identify the information considered, capture meaningful parent participation, and explain the reasons for significant team decisions. Most importantly solid IEP notes allows the IEP document itself to serve as Prior Written Notice.

1. Why IEP Meeting Notes Matter

IEP meeting notes create a contemporaneous record of the team’s discussion and decision-making. They may later be reviewed during a state complaint investigation, due process hearing, OCR investigation, mediation, or litigation. In many matters, the notes are the best available evidence of what information the team considered, how the parent participated, and why the team reached a particular decision.

High-quality notes also support the District’s preparation of Prior Written Notice. Notes should therefore do more than confirm that a topic was “reviewed” or “discussed.” They should preserve the reasoning behind significant proposals, refusals, and other IEP decisions.

THE PRACTICAL TEST A person who did not attend the meeting should be able to understand what the team discussed, what information it relied upon, what the parent requested or expressed concern about, what options were considered, and why the team reached its decision.

2. The Primary Goal: Explain the “Why”

A common documentation mistake is to record only the final result. Effective notes should explain how the team moved from the information presented to the decision reflected in the IEP.

WEAK

“Team discussed ESY. Student is not eligible.”

STRONG	“The team reviewed progress-monitoring data, teacher reports, and information concerning regression and recoupment following instructional breaks. The information reviewed did not demonstrate a need for services beyond the regular school year. The team therefore determined that ESY services were not necessary at this time.”
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3. The Goldilocks Rule: Not Too Little, Not Too Much

Too Little

Entries such as “goals reviewed,” “services discussed,” or “team agreed with placement” confirm that a topic arose but do not preserve the team’s reasoning. Generic entries provide limited assistance if the decision is challenged later.

Too Much

Meeting notes should not become a word-for-word transcript. Transcripts can capture incomplete thoughts, side conversations, repetition, or statements without context. Note-takers should summarize material information and significant discussion rather than attempting to record every comment.

The Right Balance

The best notes are concise but specific. They identify the issue, summarize the information considered, document meaningful parent input, identify material options, and explain the basis for the final decision.

4. Core Principles for Effective IEP Notes

A. Be Objective, Accurate, and Professional

Use neutral descriptions of what occurred. Avoid opinions, conclusions about motive, emotional characterizations, or statements that could appear dismissive of a participant’s concern.

WEAK	“Parent was unreasonable and insisted on unnecessary services.”
STRONG	“Parent requested an increase in speech-language services and expressed concern regarding the student’s rate of progress. The team reviewed progress data and discussed the request.”

B. Focus on Significant Decisions

The record should be most detailed where the team is making a material decision concerning eligibility, evaluation, goals, services, accommodations, placement, behavior, transportation, ESY, transition, or another aspect of FAPE.

DECISION-MAKING FORMULA Issue → Data Reviewed → Parent Input → Options
Considered → Team Analysis → Decision

C. Capture Meaningful Parent Participation

The notes should reflect parent concerns, questions, requests, agreement, and disagreement when relevant. Just as importantly, the notes should document the team's response. Recording the parent's statement without the response leaves the decision-making record incomplete.

WEAK	"Parent requested more reading support. Team declined."
STRONG	"Parent requested additional reading support because of concern regarding decoding progress. The team reviewed benchmark data, goal progress, classroom performance, and the current service schedule. The team discussed maintaining current services and increasing direct instruction. Based on the student's documented progress under the current program, the team recommended continuing the existing service level with continued progress monitoring."

D. Document Proposals and Refusals

A parent request should not disappear from the notes merely because the team did not adopt it. For each significant request, document what was requested, the information considered, the team's response, and the student-specific reason for that response. The same approach should be used for District proposals.

5. What the Notes Should Address

Meeting Logistics

- Date, time, meeting purpose, and method of participation.
- Attendees and titles or roles.
- Interpreter participation, if applicable.
- Team member excusals and related parent agreement or consent, as applicable.
- Procedural safeguards and any applicable waiver of notice or implementation timelines.

Evaluations, Reports, and Other Data

- Identify the reports, assessments, records, and other data sources reviewed.
- Summarize significant findings that informed the team's decisions.
- Identify parent questions, concerns, agreement, or disagreement regarding the information.
- Document consideration of private evaluations, independent educational evaluations, and relevant outside-provider information.

Present Levels and Student Needs

- Summarize relevant strengths, current performance, and areas of need.
- Identify the progress-monitoring, classroom, observational, attendance, behavioral, or other data discussed.
- Explain how the identified needs connect to goals, services, accommodations, and placement decisions.

Annual Goals and Progress

- Document progress toward current goals.
- Explain the basis for adding, revising, continuing, or discontinuing a goal.
- Capture significant parent and staff input concerning the proposed goals.

Accommodations, Modifications, and Supports

- Identify supports considered and information concerning their effectiveness.
- Explain the basis for adding, revising, continuing, or removing a support.
- Document parent input and the team's response.

Services and Placement

- Identify service-delivery and placement options actually considered.
- Document the student-specific information informing the discussion.
- Explain why the selected option was appropriate and why material alternatives were not selected.
- Capture relevant parent agreement, disagreement, questions, or requests.

WEAK	"The team considered the continuum and agreed on placement."
STRONG	"The team discussed continued participation in general education with supplementary aids, increased resource support, and a more restrictive instructional setting. Based on the student's progress with current supports and ability to access grade-level instruction, the team recommended continued general education participation with specified direct specialized instruction and accommodations."

Extended School Year and Other Required Considerations

Avoid entries that merely state that ESY, assistive technology, transportation, behavior, communication, transition, or another required consideration was "addressed." When applicable, identify the information considered, summarize the discussion, and state the basis for the resulting determination.

6. Common Documentation Problems to Avoid

Problem	Better Practice
Boilerplate language	Generic statements such as "FAPE was offered," "team agreed," or "continuum considered" are not a substitute for student-specific reasoning.
Omitting disagreement	Notes should not create an artificial appearance of consensus. Accurately document relevant disagreement and the team's response.

Problem	Better Practice
Recording the concern but not the response	Pair every significant concern or request with the team's consideration and response.
Inconsistency among documents	The notes, final IEP, evaluation documents, and Prior Written Notice should tell the same substantive story.
Emotional or accusatory descriptions	Describe statements and conduct neutrally. Do not characterize a participant as unreasonable, hostile, difficult, or uncooperative.
Copying another student's language	Student-specific reasoning is essential. Copying creates accuracy and credibility risks.
Failing to identify follow-up items	When the team agrees to obtain information, revise a document, consult a provider, or reconvene, identify the responsible person and next step.

7. Writing Style and Tone

- Use plain, understandable language.
- Use complete thoughts and student-specific descriptions.
- Attribute statements when the identity of the speaker matters, particularly for parent requests, professional recommendations, or disagreement.
- Use “the team discussed” when individual attribution does not add value.
- Distinguish information reported by a participant from an independent finding by the team.
- Avoid jargon, unexplained acronyms, speculation, and conclusory legal phrases.
- Proofread names, dates, titles, service amounts, placement descriptions, and pronouns before finalizing.

8. Relationship to Prior Written Notice

IEP meeting notes and Prior Written Notice serve related but distinct purposes. Meeting notes preserve the team's discussion and decision-making process. Prior Written Notice communicates the District's proposed or refused action and the required explanation supporting that action. Strong meeting notes provide the information needed to prepare a complete, accurate, and student-specific notice, but notes should not be assumed to replace a separate notice unless all applicable requirements are satisfied.

PWN ALIGNMENT CHECK For every significant proposal or refusal, capture: the action; the reason; the information relied upon; the options considered and why they were rejected; and other relevant factors, including parent input.

9. The Future-Reader Test

Before finalizing the notes, read them as though the meeting occurred two years ago and no participant is available to explain what happened. The notes should allow a future reader to answer:

1. What did the parent request, share, or express concern about?
2. What did the District or IEP Team propose or refuse?
3. What information did the team rely upon?
4. What meaningful options did the team consider?
5. Why did the team reach its decision?

BOTTOM LINE Strong notes do not attempt to preserve every word. They preserve the information, participation, options, analysis, and rationale necessary to understand and evaluate the team's work.

APPENDIX A

IEP MEETING NOTES CHECKLIST

Quick Reference Guide for Note-Takers

HOW TO USE THIS CHECKLIST Keep this section available during the meeting and use the final review sections before the IEP and Prior Written Notice are issued.

1 | BEFORE THE MEETING

- ☐ Confirm the meeting purpose.
- ☐ Review relevant evaluations, progress reports, service data, and other information likely to be discussed.
- ☐ Identify known parent concerns or requests.
- ☐ Designate the note-taker and confirm access to the note-taking form or IEP system.
- ☐ Prepare to capture significant proposals, refusals, options considered, and reasons for decisions.

2 | OPENING THE MEETING

- ☐ Record the date, meeting purpose, start time, and method of participation.
- ☐ Identify attendees and professional titles or roles.
- ☐ Document parent participation.
- ☐ Document interpreter participation, if applicable.
- ☐ Document team member excusals and related parent agreement or consent, as applicable.
- ☐ Document procedural safeguards and applicable waivers.

3 | EVALUATIONS, REPORTS, AND DATA

- ☐ Identify each report, assessment, record, or other data source reviewed.
- ☐ Summarize significant findings that informed decisions.
- ☐ Document parent questions, concerns, agreement, or disagreement.
- ☐ Document consideration of private evaluations, IEEs, and outside-provider information.
- ☐ Connect the information reviewed to the resulting decisions.

QUICK CHECK Could someone reading the notes later identify the information the team relied upon?

4 | PARENT PARTICIPATION

- ☐ Document parent concerns, questions, requests, and information shared.
- ☐ Document the team's response to each significant concern or request.
- ☐ Identify relevant areas of agreement and disagreement.
- ☐ Document how parent input was considered in the team's decision-making.
- ☐ If the parent did not attend, document attempts to arrange meaningful participation.

5 | PRESENT LEVELS, GOALS, AND PROGRESS

- ☐ Summarize relevant strengths and educational needs.
- ☐ Identify current performance and progress data reviewed.
- ☐ Document progress toward existing goals.
- ☐ Explain the basis for adding, revising, continuing, or discontinuing goals.
- ☐ Document significant parent and staff input.
- ☐ Confirm consistency with the final IEP.

6 | ACCOMMODATIONS, MODIFICATIONS, AND SERVICES

- ☐ Identify supports and services considered.
- ☐ Document information regarding the effectiveness of current supports.
- ☐ Explain the basis for adding, revising, continuing, or removing a support or service.
- ☐ Document frequency, amount, location, or delivery model when materially discussed.
- ☐ Document parent concerns or requests and the team's response.
- ☐ Confirm consistency with the final IEP.

7 | PLACEMENT AND LEAST RESTRICTIVE ENVIRONMENT

- ☐ Identify the options actually considered.
- ☐ Document the student-specific information informing the discussion.
- ☐ Document relevant benefits and concerns associated with material options.
- ☐ Explain why the selected placement was appropriate and why other options were not selected.
- ☐ Document parent input, agreement, or disagreement.
- ☐ Avoid relying only on a statement that "the continuum was considered."

8 | SPECIAL FACTORS AND REQUIRED CONSIDERATIONS

- ☐ ESY, including relevant data and the basis for the determination.
- ☐ Assistive technology.
- ☐ Transportation.
- ☐ Behavioral needs, including an FBA or BIP when applicable.
- ☐ Communication and language needs.
- ☐ English learner needs.
- ☐ Transition assessments, goals, services, graduation status, and transfer of rights, as applicable.
- ☐ Health, medical, attendance, or other factors affecting access, progress, or services.

9 | PARENT REQUESTS, PROPOSALS, AND REFUSALS

- ☐ Record each significant parent request with enough specificity to understand it.
- ☐ Document the information and options considered in response.
- ☐ Document whether the team accepted, declined, or deferred the request.
- ☐ Explain the student-specific reason for the response.
- ☐ Identify any follow-up action, responsible person, and next step.

REQUEST-AND-RESPONSE WORKSHEET

Parent Requested	
Team Considered	
Team Decision	
Reason	

10 | PRIOR WRITTEN NOTICE ALIGNMENT

- ☐ The action proposed or refused is identified.
- ☐ The reason for the proposal or refusal is documented.
- ☐ The evaluations, assessments, records, reports, or other data supporting the decision are identified.
- ☐ Other options considered and the reasons for rejecting them are documented.
- ☐ Other relevant factors, including parent input, are captured.

IMPORTANT Meeting notes support, but do not automatically replace, a complete and compliant Prior Written Notice.

11 | BEFORE FINALIZING

- ☐ The notes summarize significant discussions and are not a word-for-word transcript.
- ☐ The tone is factual, neutral, and professional.
- ☐ The notes do not speculate about motives or use emotional, accusatory, or judgmental language.
- ☐ Every significant parent concern or request is paired with the team's response.
- ☐ Every major decision includes a student-specific rationale.
- ☐ The notes, final IEP, evaluation documents, and Prior Written Notice are consistent.
- ☐ Follow-up items identify the responsible person and next step.
- ☐ Names, titles, dates, service amounts, and other details are accurate.
- ☐ Boilerplate has been replaced with information specific to the student and meeting.
- ☐ The notes have been proofread before finalization.

12 | THE FIVE-QUESTION TEST

Before finalizing, confirm that the notes allow a future reader to answer each question:

1 What did the parent ask, share, or express concern about?

2 What did the District or IEP Team propose or refuse?

3 What information and data did the team rely upon?

4 What meaningful options did the team consider?

5 Why did the team reach its decision?

FINAL REMINDER The purpose of good notes is not to create more paper. It is to create a clear, accurate, and useful record of meaningful participation and reasoned, student-specific decision-making.

This guidance is a practical reference and should be used together with the District's policies, procedures, and forms.