

Facilitator Checklist

Before the meeting: (depending on facilitator's role in pre-meeting preparation)				
	Yes	No	Not Required	Comments
Ensure all relevant team members are invited, including student, if appropriate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ask parent to bring picture of student, if student not in attendance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
If all members of IEP team cannot attend, do you need a written waiver of participation from the parent?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Prepare agenda with proposed timelines for discussion items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Gather information from participants (depending on intake process)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Gather information about issues, history of conflict, possible dynamics, special needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Attend to meeting logistics (location, date/time, length of meeting, chairs and tables, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Provide/arrange supporting materials and props (name tags/tents, easel, paper, pens, snacks, water, tissues, etc.); chairs arranged for collaborative process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Position Agenda in full view of all team members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Greet and introduce each team member as s/he arrives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Add child's picture to the center of meeting table	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

During the meeting:

<i>Getting Started</i>	Yes	No	Not Required	Comments
Set positive, collaborative tone, establish rapport	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Verify presence of all necessary team members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Explain each person's role and connection to the student	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Verify copies of all documents for all participants (old IEP, draft IEP, evaluations, data, attendance record, report card, written waiver of participation, written amendment to the IEP, consent to evaluate, as appropriate)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Clarify expectations and purpose of meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Explain time-frame and verify each person's ability to stay until conclusion of meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Share and adjust Agenda as needed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Clarify what, if anything, will be confidential	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Establish ground rules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Define decision making process (meaning of consensus and district rep's responsibility if no consensus)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Clarify roles and responsibilities of team members:				
• IEP drafter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
• Meeting note taker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
• Participants (student, parents, educators, service providers, district rep)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
• Facilitator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Use visual tools to help participants track process and any decisions made:				

• Goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
• Agenda	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
• Ground Rules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
• Discussion Notes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
• Parking Lot	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
• Action Plans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<i>Throughout the meeting</i>	Yes	No	Not Required	Comments
Ensure participation of all team members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Treat all team members in a balanced manner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Keep focus on student strengths and challenges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Gather information from each participant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ensure key terms and acronyms are understood	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Clarify and organize topics for discussion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Clarify interests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Encourage effective communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Create/Support positive team member relationships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Team and trust building	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Use consensus building techniques	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Facilitate mutual understanding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Model collaboration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Employ strategies to preempt or address disruptive behaviors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Intervene when the meeting goes off track	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ensure that all team members remain focused on student needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Stay alert to power dynamics that impact team communication and decision-making	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Encourage participants to share differing perspectives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Identify specific information critical to an informed discussion and decision	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Attend to IEP basic elements and possible components:				
• Eligibility and evaluations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
• Present level of performance (academic, behavioral)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
• Goals and objectives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
• Specially designed instruction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
• Related services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
• Placement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
• Modifications and accommodations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
• ESY and other special factors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<i>Bringing closure</i>	Yes	No	Not Required	Comments
Agree upon problem definition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Identify criteria for evaluating best options based on benefits and values	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Help participants to select best options for programs and services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Build small agreements throughout process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Integrate possible options into workable solutions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Offer helpful decision making processes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Facilitate closure on each element of the IEP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Identify details of an implementation action plan (Who, What, When, Where, How):				
• Responsibilities of each team member	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

• Process for check-in and follow-up	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Clarify meaning of signing IEP document	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Disseminate copy of IEP document to each team member --OR-- Determine next steps, e.g. reschedule meeting with plan for when and "homework" in the interim; schedule individual meetings, other?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Express appreciation to each team member for participation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Acknowledge what was accomplished	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Provide evaluation form to each participant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Following the meeting (depending on facilitator role in implementation and follow-up):				
	Yes	No	Not Required	Comments
Check in or follow up as agreed by team during meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Address problems in implementation of IEP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Provide opportunity to team members for 3 - 6 month follow-up evaluation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	