

CASE CONFERENCE AGENDA CHECKLIST

SEAMLESS TRANSITION

Produced by the Center on Community Living and Careers, with funding support from the Indiana Division of Disability and Rehabilitative Services' Bureau of Disabilities Services, a division of the Indiana Family and Social Services Administration.

March 2025



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Agenda Checklist Package

This agenda checklist contains tools to prepare for a seamless transition case conference. Connecting the concept of seamless transition to the Individualized Education Program (IEP), we developed this **Case Conference Agenda Checklist**.

The focus of this package is to center the meeting on the student and build the IEP around the student's strengths, preferences, interests, and needs. Input from the student's family is a highly valued part of the process, as is each member of the seamless transition team.

The following items are contained in this package:

- **Special Education Teacher Letter**
 - Sample explanatory letter
- **Case Conference Agenda Checklist**
 - Help team members understand sections of the IEP.
 - Can be used to understand elements of a seamless transition.
 - Help teams see the connections of seamless transition within the IEP.
- **Student-Led IEP Sample Script**
 - Can be used to practice skills throughout the year.
 - Can help prepare for the meeting.
- **Family Letter**
 - Sample correspondence to parents or guardians.
- **Interagency Service Provider Letter**
 - Sample correspondence to parents or guardians.

Special Education Teacher Letter

Dear Special Education Teacher,

We developed a Case Conference Agenda Checklist to connect the concept of seamless transition within the Individualized Education Program (IEP). The purpose of this checklist is to focus the meeting on the student and build the IEP around the student's strengths, preferences, interests, and needs. Input from the student's family/guardian is of utmost importance and a highly valued part of the process. As you look over the agenda, consider the following case conference committee members:

Student: This is who everything is about— their plans, ideas, hopes, and dreams.

Family/Guardian: These individuals know the student best. They have the most information and the historical perspective of the student. They are like expert witnesses giving testimony rather than only observing other members providing information.

School Staff: These individuals have expertise in working with students who have disabilities. They take all information gathered on the student, evaluate it, make recommendations to the team, and revise those recommendations according to feedback. School staff members include, but are not limited to, the Teacher of Record (special education teacher licensed in the student's area of disability), General Educator, Public Agency Representative (an administrator or their designee), Transition Coordinator (if the district has this position), and Related Service Providers (as needed – physical therapy, occupation therapy, speech therapy, and nursing).

Interagency Providers: Pre-ETS and VR staff share student observations and skills related to employment. They help bridge the gap from school to community, can encourage self-advocacy across settings, look at post-secondary options, and work on obtaining and maintaining employment. Their involvement strengthens the student's transition to adulthood.

Medicaid Waiver Case Manager: Ensures the waiver services evolve with the student's age, development, and achievements, along with the family's needs. Case managers keep the student's person-centered plan up to date, document interests, goals, and needs, and offer choices or "pick lists" of service providers that can best assist with the goals at hand.

Following the agenda are sample correspondences to send to parents and Pre-ETS/VR staff. These letters go into detail about the member's role. There is also a student script that can be adjusted accordingly to fit each student's needs.

The Case Conference Agenda Checklist itself is also editable. You may want to consider adding a list of the remaining parts of the IEP that need addressing for compliance purposes, as not all parts of the IEP are covered in the agenda.

We hope you find this useful as you plan for a seamless transition.

Case Conference Agenda Checklist

This student-driven meeting checklist covers Individualized Education Program (IEP) sections while addressing a Seamless Transition (ST). The components of Seamless Transition are: Student Centered, Family Engagement/Interview, Interagency Team, Positive Personal Profile (PPP), and Employment Exploration.

Introduction of Team Members - Student

- IEP: Student Information and Transition IEP Team
- ST: Student Centered, Family Engagement/Interview, and Interagency Team

Parent/Guardian Perspective

- IEP: Present Level of Academic Achievement and Functional Performance
- ST: Family Engagement/Interview

Update on Classroom Performance, Skills, Strengths, Interests, Preferences, Concerns – Student and School Staff

- IEP: Present Level of Academic Achievement and Functional Performance
- ST: Student Centered

Transition Assessment Results – Student and School Staff

- IEP: Summary of Findings (from multiple transition assessments)
- ST: Positive Personal Profile (PPP)

Post-Secondary Goals – Student

- IEP: Measurable Post-Secondary Goals (identified through assessments)
- ST: Student Centered, Positive Personal Profile (PPP)

Transition Services – Student and Team

- IEP: Transition Services
- ST: Student Centered, Interagency Team, Employment Exploration

Develop Annual Goals – Student and Team

- IEP: Annual Goals
- ST: Student Centered, Interagency Team

Accommodations – Student and Team

- IEP: Accommodations
- ST: Student Centered, Interagency Team

Diploma and Graduation Date – Student

- IEP: Diploma Status
- ST: Student Centered

Consent – All Team Members Sign

- IEP: Consent
- ST: Student Centered, Family Engagement/Interview, and Interagency Team

Student-Led IEP Sample Script

This script is designed to give the student ideas on what to say at the case conference. Students are encouraged to edit and simplify it according to how they will run their meeting.

Introduction of Team Members

Welcome to my transition case conference. My name is _____ and this is a little bit about me _____.

I'd like to introduce my team and how they support my success. There are new members on my team who will be working with me. They will introduce themselves and say how they will be supporting me.

Parent/Guardian Perspective

My parents, _____, are now going to share some information about me.

Update on Classroom Performance, Skills, Strengths, Interests, Preferences

Concerns from Students and School Staff

- Did you know I am good at _____?
- I have learned the following skills _____ so far.
- My key personality traits are _____.
- Socially, I am involved in _____.
- I am doing the best in these classes _____.
- I need help in these classes _____.
- Can you share what you think I do well and how I can do better?

Transition Assessment Results

From Student and School Staff

Assessments I completed this year:

- The Positive Personal Profile (PPP).
- Authentic Assessments from my work-based learning experiences.
- Other assessments: _____, _____.
- What I learned from my job experience at _____ is _____.
- This job experience helped me realize that I (**do** or **do not**) want to do this.
- I learned that I want more experience in _____.
- I learned that I'd like to try something different like _____.
- Other assessments have taught me _____ about myself.

Post-Secondary Goals

From Student

- **Employment:** For my career, I want to _____.
- **Education and Training:** I want to be trained in this career by _____ (going to college, a technical school, or on the job).
- **Independent Living:** After high school, I plan on _____ (living independently, living with my parents, living with a friend). To accomplish this, I _____.

Transition Services

From Student and Team

These were my experiences with some job sites:

1. **Automotive**—I really liked it, but I need more experience before they let me try anything.
2. **Pet care**—I thought I'd like it, but I didn't like cleaning out cages and the constant barking made me anxious.
3. **Care Center work**—I liked taking the meals to the older people's room. It made me feel happy to help them. Because of these experiences, I want to take the class at school that teaches about working in the medical field and going to the care center two days per week.

Student writes out their own experience.

Develop Annual Goals

From the Student and Team

Sample conversation:

"This is how my classes helped me with my goals:

- I didn't know I needed math to work as a mechanic. It made me ask to learn the math they wanted me to know.
- I want to sign up for a Career Technical Education course to learn more.
- Reading the labels helped me know who to deliver the food. I'm glad I got better at reading names and numbers to know who and where to go at the care center."

Student writes out the conversation.

Accommodations

From the Student and Team

This is what I need to be successful (for example, extended time for tests, smaller test setting):

Diploma and Graduation Date

From the Student

“I will be receiving the _____ diploma or certificate. My graduation date is _____.”

Consent

For All Team Members to Sign

“Does everyone agree with our decisions? Thank you for your participation today. Please sign my IEP attendance form.”

[Date]

Dear **[Family/Guardian]**,

[Student Name] case conference will be held on **[Day and Date]**. At this meeting, the team must discuss **[Student Name]** strengths, preferences, interests, needs, and how they are performing in school. The information that is discussed is written into a document called an Individualized Education Program (IEP).

Whether you are new to the IEP process or not, it can be overwhelming. I want to make sure that you understand what is happening in the meeting at each step. **[Student Name]** will be leading the meeting and begin by talking about themselves. Next, you will be given time to share your perspective about **[Student Name]**. Some questions for you to think about are:

- What is **[Student Name]** good at?
- What are their interests?
- What do you like about **[Student Name]** personality?
- Are there any concerns I have about school or **[Student Name]** future?

You can share whatever you would like. We focus on keeping the meeting positive and strength-based while still identifying concerns and needs.

After you are finished, other members of the team will share information. If you have questions while another team member is talking, write them down so you can ask them when that team member is done sharing. I want to make sure you understand what is being said in the meeting.

In the IEP, the information discussed will be written down, along with short- and long-term career focused goals, activities to accomplish, services to help meet the goals, and accommodations to help **[Student Name]** be successful. When you get the IEP, if you have any questions about anything it says, please contact me and I will go over it with you. I want to make sure you understand what is said in the document.

I am attaching a copy of what the agenda will look like so you can see it in advance. If you have questions before the case conference, please contact me. My goal is to make you feel like a welcomed and valued member of **[Student Name]** meeting.

I look forward to planning with you for **[Student Name]** future.

Sincerely,

[Name], Special Education Teacher

[Date]

Dear **[Interagency Service Provider]**,

The Case Conference Committee for **[Student Name]** will be meeting on **[Day and Date]** at **[Time]**. I have enclosed the agenda that will be used. You are considered an Interagency Service Provider (non-school staff) on the Interagency Team.

As you can see on the attached agenda, the Interagency Team is listed under Transition Services, Annual Goals, and Accommodations. During this time, you may be asked to share what you have been doing with **[Student Name]** and how they have been performing. This can include Pre-ETS, working on self-advocacy, or looking at postsecondary opportunities. For example, it could also include VR sharing how a picture schedule has helped a student with independence at work. You may be asked to share what you have observed about a student's strengths, preferences, interests, and needs during the Update on Performance, as the student will also be sharing about these areas.

Be prepared to answer questions you may be asked, especially by the students' parents. Parents may ask, "How many hours do you think **[Student Name]** can work? Will **[Student Name]** always need a job coach? How long will it take to find a job? Is college realistic?" Provide a positive response while also expressing your genuine opinion. Parents need to hear the truth, but the truth can be given in many ways. Focus on what the student CAN do rather than what the student cannot do.

If you have any questions before the meeting, please contact me by email or phone. I look forward to your contribution and suggestions in making **[Student Name]** transition seamless.

Sincerely,

[Name], Special Education Teacher

[Email Address]

[Phone Number]

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