



*Example*

## SUMMARY ACTION REPORT

Prepared for: Name(s) of Clients

Name of Consultant

Title of Consultant

Email address of your consultant

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*"While confidential, services provided by Advo-Kids non-attorney consultants neither create nor constitute an attorney-client relationship for the provision of legal advice and/or legal services."*

## SUMMARY OF ADVISORY CONFERENCE AND ACTION PLAN

June 5, 2020

Prepared for: Name(s) of Client

*\* This example report is representative of how we develop, document, and illustrate information and strategies for addressing the concerns that brought you to working with Advo-Kids. The purpose of the Summary Action Report (SAR) is to summarize your Advisory Meeting, identify your goals, articulate strategies for meeting those goals, and to name specific resources, laws, policies, and additional individuals / agencies / organizations to support meeting your goals. Each report is customized and shaped around your needs and is addressed to you in a direct and personal manner.*

### CLIENT GOALS:

*\* During the Advisory Conference, you will identify and outline specific goals with your consultant. This section provides an overview of your goals and lists details that will be discussed, clarified, and/or addressed with categorical recommendations and resources. The number of goals outlined depends on your needs.*

**1st: Specific goal**

- *Bulleted details to be addressed*

**2nd: Specific goal**

- *Bulleted details to be addressed*

### SUMMARY OF ADVISORY CONFERENCE:

*\* This section is written in a narrative form and describes a summary of the situation and/or concerns you shared with your consultant. Details regarding evaluations and other reports or documents are included in this section, as well as background information regarding your child and their medical, educational, and/or daily living needs.*

**GOAL: Each goal is listed individually and specifically addressed in detail.**

- Recommendations / suggestions / concepts related to addressing the goal are bulleted to provide precise direction and resources.
  - **Detailed information:** The information provided in sub-bullets lists specific actions, vocabulary, and/or strategies for reaching the goal.
  - **Tables / Charts:** To provide clarification / information as a visual support or guide, a table or graph may be included as a tool for connecting points and/or displaying a trajectory of action.

**ADDITIONAL RECOMMENDATIONS FOR IEP TEAM (SCHOOL) MEETING:**

*\*The suggestions under this heading provide recommendations to our clients for attending a school / IEP meeting when advocating for their child. Some situations / needs of our clients do not include preparing for a meeting; however, to provide a comprehensive approach for helping you, we provide recommendations for how to present your concerns or desired outcome in a formal meeting with the school district. Some of these recommendations may include:*

- Laws governing the process of attending / holding an IEP meeting.
- Roles and responsibilities of the IEP team members, including you as the parent.
- Recommendations and reminders for reviewing documents during the meeting.

**ADDITIONAL SUGGESTIONS:**

*\*This section of the report may include:*

- The names of agencies and/or individuals you are recommended to contact to support your needs.
- Information and recommendations regarding organizations to contact or seek out for support.
- Web links and online resources are listed in this section to support your needs and provide additional information.

*\*Each report concludes with offering suggestions for how to use the report as a tool, an explanation of accompany documents (if any), and/or additional steps to take with your consultant (if applicable).*