**Assessment Summary Sheet**

In preparation for a student’s Individualized Education Program (IEP) process, it is important to have multiple forms of assessment information to share with stakeholders in user-friendly language.

**Directions:** Use the chart below as a guide to communicating assessment findings with stakeholders to prepare for an IEP meeting in advance before the scheduled meeting.

**Student Grade:** \_\_\_\_\_\_\_

**Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Special Education Teacher Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**General Education Teacher Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Other Stakeholders:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Type of Assessment**

* State: (e.g., SOLs)
  + Score:
  + Student strengths:
  + Student needs:
  + Instruction implications and accommodations:
* Classroom/Division: (e.g., eCart, benchmark tests)
  + Score:
  + Student strengths:
  + Student needs:
  + Instruction implications and accommodations:
* Progress Monitoring: (e.g., CBMs [Curriculum-Based Measurements])
  + Score:
  + Student strengths:
  + Student needs:
  + Instruction implications and accommodations:
* Observation: (e.g., anecdotal, formal observations)
  + Student strengths:
  + Student needs:
  + Instruction implications and accommodations:
* Norm Referenced: (e.g., K-TEA, WJ-IV)
  + Score:
  + Student strengths:
  + Student needs:
  + Instruction implications and accommodations:

**How has progress affected educational programming?**

**How have you addressed when this student is not progressing toward a goal?**

**References**

McLeskey, J. (Ed.). (2019). *High leverage practices for inclusive classrooms*. New York: Routledge.

Adapted from VDOE TTAC at GMU. HLP Highlight Tool - *HLP 5: Interpret and Communicate Assessment Information with Stakeholders to Collaboratively Design and Implement Educational Programs*. Retrieved from <https://ttaconline.org/Resource/JWHaEa5BS77pmPndMjk0vA/Resource-hlp-highlight-tool---hlp-5-interpret-and-communicate-assessment-information-with-stakeholders-to>

**Template: Meeting Agenda**

Teacher Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| --- |
| **Today’s Meeting:** |
| **Purpose of Meeting:** |
| **Desired Outcome of the Meeting:** |
| **Welcome/Introduction** |
|  |
| **Initial Draft Meeting Agenda** |
|  |
| **Specific Questions to Ask During Meeting** |
|  |
| **Specific Resources to Share** |
|  |
| **Meeting Notes** (use this space to take notes for follow-up actions/future instructional planning *during* the meeting) |
|  |
| **Meeting Reflection** (complete this immediately *after* the conversation ends but before you watch your video) |
|  |

**IEP Meeting Follow-Up Activities: Develop a Post-IEP Meeting “To Do” List**

**Directions:** After an IEP meeting, complete the chart below to include the following:

* Identify the follow-up task(s).
* Determine the team member responsible.
* State the completion date.
* Add any additional notes for context.

**Examples of Post-IEP Meeting Tasks:**

* The special education teacher will follow up with Mrs. Smith about training Student K in the new strategy.
* Mrs. Smith will meet with Student K’s supervisors to coordinate training in the new strategy that will be implemented when Student K is working at Publix.
* Mrs. Jones will also start using this strategy at home to reinforce.

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| --- | --- | --- | --- |
| **Follow-Up Task** | **Team Member Responsible** | **Completion Date** | **Additional Notes** |
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**IEP Meeting Practice Template: What Do You Notice?**

**Directions:** Watch the video clips of an IEP meeting. Using the following table, note if the IEP meeting best practice was observed during the video. Then, provide feedback if the example was positive or needed improvements and why.

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| --- | --- | --- |
| **IEP Meeting Best Practice** | **Was this aspect observed in the meeting?**  **Yes, or No?** | **Describe if the video clip provides a positive example. Why?**  **What suggestions do you have to improve the practice highlighted in the video? Why?** |
| **Prepare** | | |
| Set a clear goal. |  |  |
| Right participants. |  |  |
| **Facilitate** | | |
| Establish a welcome and positive tone. |  |  |
| Promote discussion, equal voice, and contributions. |  |  |
| Maintain efficiency by consensus building and staying on task. |  |  |
| Ensure members understand any data. |  |  |
| Summarize what is accomplished. |  |  |
| Discuss follow-up activities. |  |  |
| Other |  |  |

**Video Guide**

Link to video: [Facilitated IEP Meeting](https://esc13.net/resources/a-facilitated-iep-meeting)

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| --- | --- | --- |
| **IEP Meeting Best Practice** | **Was this aspect observed in the meeting?**  **Yes, or No?** | **Describe if the video clip provides a positive example. Why?**  **What suggestions do you have to improve the practice highlighted in the video? Why?** |
| **Prepare** | | |
| Set a clear goal. (4:39–6:55) | Yes | * At the beginning of the meeting, the principal clearly communicates the purpose of the meeting to—to discuss Amy’s behavior—and the goal of the meeting—to identify strategies to help Amy. This was written and posted in the room. * The principal also provides an agenda to each participant and reviews the agenda. * While this was communicated, I would suggest being more specific in the purpose and goal. |
| Right participants. (4:39–6:55) | Yes | * All participants involved in the purpose of this meeting (Amy’s behavior) are present. This includes the behavior specialist, special education teacher, general education teacher, principal, and parent. |
| **Facilitate** | | |
| Establish a welcome and positive tone. (4:39–6:55) | Yes | * Greeted everyone with a handshake and full attention—not hiding behind computers or shuffling through paperwork. * Posted a list of commonly used special education acronyms. * Began with introductions, purpose, and goal of the meeting, and set meeting norms on how to work “collaboratively and productively.” |
| Promote discussion, equal voice, and contributions. (7:46–8:26) | Yes | * Posted guidelines on how team members will interact with each other. These clear expectations set the process for trust. * Principal asked team members for a commitment to follow the guidelines. |
| Maintain efficiency by consensus building and staying on task. (27:58–30:43) | Yes | * Utilized questioning to gain clarity and seek consensus. * Did not force an “all or nothing” vote but sought their range of consensus. * Asked each team member, “Are you within the consensus range?” as opposed to, “Are we all in agreement?” |
| Ensure members understand any data. (14:17–17:04) | Yes | * Asked Amy’s mom to describe the data from therapists and doctors outside the school. * Utilized questioning to ensure all team members understood the data. * Used a neutral summary to reframe the statement to help team members see it in a different way. |
| Summarize what is accomplished. (14:17–17:04; 31:42–33:15) | Yes | * The principal repeated the exact words spoken by Amy’s mom. * Discussed follow-up activities. * Principal asked for written suggestions on how to improve future meetings. |
| Discuss follow-up activities. (31:42–33:15) | Yes | * Team used a commitment form to document specific activities and note which team member is responsible. |
| Other |  |  |

**Collaboration Plan: Five-Step Process**

**Directions:** The Five-Step Process is a simple model to use during collaborative planning. It allows the group to identify, implement, and evaluate the success of a strategy.

Using the Five-Step Process, describe how you will collaborate with others to teach material in a way that meets your student’s instructional needs. Consider the following steps:

* **Step 1)** Think of a student in your class who has an IEP or disability and is struggling in a certain area. Using confidentiality, list the student. For example, Student K.
* **Step 2)** Use the Five-Step Process chart to plan how you will collaborate with your colleagues to meet your student’s instructional needs.
* **Step 3)** Make sure to consider potential barriers and how the student will overcome the barriers.

**Student: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Disability and/or specific needs: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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| **Step 1:**  **IDENTIFY** | What is the academic standard, task, and performance requirement for this student? For social skills or strategies and behavior, what is the area of concern and the expected social skill acquisition or behavior modification? |
| **Step 2:**  **DISCUSS** | What accommodations or modifications are needed by the student? Identify the available materials and resources. |
| **Step 3:**  **DECIDE** | What strategies, accommodations, and/or modifications will be used? Who will be responsible for the implementation of the strategies, accommodations, and/or modifications? |
| **Step 4:**  **MONITOR** | How will you monitor the progress of implementation? |
| **Step 5:**  **EVALUATE** | How will you evaluate the success of the implemented strategy? |

*Adapted from* https://tats.ucf.edu/wp-content/uploads/sites/32/2018/10/The-Five-Step-Process-for-Collaborative-Planning.pdf

**My Collaboration**

**Directions:** Reflect on your practice. Identify some successes and areas of improvement for collaborating with professionals in the following areas: cultivating positive relationships, shared problem-solving, and co-teaching considerations. Then, identify some successes and areas of improvement for collaborating with families in the following areas: topics of ongoing communication, modes of continuing communication, and communication regarding the supports and resources families may need.

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| **Collaboration** | **Successes** | **Areas for Improvement** |
| **Professionals** | | |
| Cultivating Positive Relationships |  |  |
| Shared Problem Solving |  |  |
| Co-Teaching Considerations |  |  |
| **Families** | | |
| Ongoing Communication Topics |  |  |
| Ongoing Communication Modes |  |  |
| Ongoing Communication—Supports Needed and Resources Available |  |  |