Session 3: Facilitating IEP Meetings and Collaborating with the IEP Team

[enter district or school name] Training

[enter date]

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Welcome

- Introductions
- Name, school, and position
- Number of years in education

Agenda

Objectives

As a result of this professional learning session, teachers will:

- Understand the types and purposes of IEP meetings, including:

  - Initial, Revision/Amendment, Annual Review, and Reevaluation

- Facilitate IEP meetings using best practices, including:

  - HLP 2: Organize and facilitate effective meetings with professionals and families.

  - HLP 5: Interpret and communicate assessment information with stakeholders to collaboratively design and implement educational programs.

Objectives (cont'd)

- Gain skills of how to collaborate with members of the IEP team—including families — through the following HLPs:

    - **HLP 1:** Collaborate with professionals to increase student success.

    - **HLP 2:** Organize and facilitate effective meetings with professionals and families.

    - **HLP 3:** Collaborate with families to support student learning and secure needed services.

    - **HLP 5:** Interpret and communicate assessment information with stakeholders to collaboratively design and implement educational programs.

Materials

- Handout: What Do You Notice? (provided)

- Collaboration Plan: Five-Step Process (provided)

- IEP Meeting and Document Review (provided)

- Agenda Template (provided)

- Assessment Summary Sheet (provided)

- IEP Facilitation and Reflection Sheet

- IEP Meeting and Document Review

Engagement Tools

Discussion　　**Activity**　　**Learning Extension**　　**Resource**

Section 1: IEP Meetings

HLP 2: Collaboration High-Leverage Practices

HLP 1 Collaborate with professionals to increase student success.

HLP 2 Organize and facilitate effective meetings with professionals and families.

HLP 3 Collaborate with families to support student learning and secure needed services.

HLP 2: Key Elements of Facilitation

Lead and Participate

Educators lead and participate in various meetings. Examples include IEP meetings, parent or family meetings, and instructional planning.

Identify Student Outcomes

Identified outcomes should be measurable. Instructional and behavior plans should be aligned and support these goals.

Facilitate Effectively

Educators develop a meeting agenda, allocate time, and encourage consensus.

HLP 5: Assessment
High-Leverage Practices

HLP 4 Use multiple sources of information to develop a comprehensive understanding of a student's strengths and needs.

HLP 5 Interpret and communicate assessment information with stakeholders to collaboratively design and implement educational programs.

HLP 6 Use student assessment data, analyze instructional practices, and make necessary adjustments that improve student outcomes.

HLP 5: Key Elements of Communication

Understand and Interpret

Educators need to understand the purpose of various assessments and how to interpret the data and convey this information for stakeholders.

Implement

Data is used to inform goal setting and the design of an education plan prior to implementation (lesson plan, IEP, behavior plan, etc.).

Involve Stakeholders

Stakeholder feedback is critical for developing and implementing student goals and education plans.

Tips for Engaging Stakeholders

Request and provide relevant assessment data to *each team member* based on their role.

Provide a data assessment *summary sheet and comprehensive learner profile* that will inform the educational plan.

Share appropriate background information and contextual considerations that emphasize students' identified strengths and needs.

Develop a plan for future data collection and use.

Source: *High Leverage Practices for Inclusive Classrooms*, 2019

IEP Meetings

- Overview of the types of IEP meetings case managers facilitate
- The components of effective meetings
  - Preparation and facilitation
    - HLP 2 and 5
- Additional resources for support
  - Tips for facilitating IEP meetings
    - IEP checklist
    - Virtual IEP meetings

Purposes of IEP Meetings

Initial

- Establish eligibility, develop the IEP, and make special education service and program recommendations.

Revision/Amendment

- Used when making minor changes to an existing IEP. **
- Revised copy will reflect the changes and modifications and will be labeled in the list of student documents as a revision.

Annual Review

- Review progress monitoring data, revise goals and objectives as needed, determine the student's program.

Reevaluation

- Mandated 3-year to discuss reevaluation and continued eligibility

** An IEP meeting can be called at any time by any party.

Components of Effective IEP Meetings

Component 1:
Prepare

Component 2:
Facilitate

Component 1: Prepare for IEP Meetings

- Set a clear goal for the meeting and prepare an agenda.

- Determine required team members and their common availability.

- Gather and organize key student assessment data.

- Share the date, data, and expectations for preparation and participation with all team members.

Prepare: Set a Clear Goal for the Meeting

Questions to consider:

Why are you having this meeting?

What do you and the participants hope to accomplish?

Example 1	Example 2
• The Goal for Student K's upcoming IEP meeting is to review his progress and discuss the effectiveness of accommodations. We will adjust his IEP, as necessary.	• The Goal for Student K's upcoming meeting is to discuss relevant data with the team to begin initial planning for Student K's transition services.

Prepare: Determine Required Team Members and Common Availability

Required

- Parent(s)
- General education teacher(s)
- Special education teacher(s)
- Local education agency representative
- Individual who can interpret implications of evaluation results (does not need to be separate participant)

Others as Appropriate

- Student (required if 16+ or if transition is discussed)
- Interpreter
- Related service personnel
- People with other specialized knowledge or expertise regarding the student
- Representatives of key agencies providing transition services

Prepare: Gather and Organize Key Student Assessment Data

Step 1: Gather assessment information and highlight main findings.

Step 2: Take into account considerations for culturally and linguistically diverse students.

Step 3: Identify the student's strengths and needs.

Step 4: Consider how assessment information impacts accommodations, modifications, and fair grading practices.

Step 5: Be prepared to explain assessment data and/or create assessment communication documents based on audience.

Resource: Assessment Summary Sheet

- The **Assessment Summary Sheet** can be used to communicate assessment findings.

- Beyond reporting assessment results, ensure you are including the following notes:

  - How will progress affect educational programming?

  - How will you address when a student is not progressing toward a goal?

Prepare:
Share the Date, Data, and Expectations

- Share the date, location and participants.

- Share the relevant data tailored to specific audiences.

- Share the purpose of the meeting and expected participation with participants.

NOTICE AND INVITATION TO A MEETING / CONSENT FOR AGENCY PARTICIPATION

To: _____   Date Notice Sent: _____

Name of Parent or Guardian

This notice is to invite you to a meeting for student _____ , DOB _____ to be held:

Meeting Date: _____   Time: _____   Location: _____

Prepare:
Share the Date, Data, and Expectations

Notice of Meeting

Each LEA shall take steps to ensure that one or both of the parents of a child with a disability are present at each IEP Team meeting or are afforded the opportunity to participate, including notifying parents of the meeting early enough to ensure that they will have an opportunity to attend, and scheduling the meeting at a mutually agreed upon time and place.

[34 C.F.R. § 300.322(a)(1)–(2)]

IEP Meetings

HLP 2:
Organize and facilitate effective meetings with professionals and families.

HLP 5:
Interpret and communicate assessment information with stakeholders to collaboratively design and implement educational programs.

Pause and Consider My Context

What are the types of meetings I typically facilitate? Are there any I have not facilitated yet?

Who organizes the IEP meetings? Is there someone that does scheduling? Are parent/teacher schedules considered?

Do I typically establish and communicate the purpose of IEP meetings with participants?

How is the participation in my IEP meetings? Is there anything I would change?

Do I typically organize data and create communication sheets? Do I need additional assistance with this?

Have I referenced my district's policies and procedurals manual?

**Identify an aspect of preparation for IEP meetings I can implement in my context.

Activity: Create a Meeting Agenda

Activity

- Think of a forthcoming IEP meeting.

- Determine if your district has a similar checklist for IEP meetings and paperwork.

- Access the Agenda Template (or create your own).

- Develop an agenda for your next IEP meeting.

Review the example checklist "IEP Meeting and Document Review."

Component 2: Facilitate Effective IEP Meetings

- Establish a welcoming and positive tone.

- Promote discussion, equal voice, and contributions.

- Maintain efficiency by encouraging consensus building while ensuring that conversations stay on-task with the meeting purpose.

- Ensure that all team members understand student data.

- Summarize what was accomplished.

- Discuss any follow-up activities that need to occur after the meeting's conclusion.

Facilitate: Establish a Welcoming and Positive Tone

- Greet all participants with a positive tone.

- Check in with front office individuals so they know someone is coming for a meeting and will provide a welcome.

- "Mrs. Jones (mom), I am so glad you are here today. You are such an important part of our team."

- "Thanks for coming, Mr. Lemstrom (general ed teacher). It is going to be helpful to learn more about biology and the class expectations so we can ensure Student K is successful."

Facilitate: Establish a Welcoming and Positive Tone

- Ensure all members are introduced with name and role.

    - For example, it is not enough to say, "This is Mrs. Smith." Instead, say, "Mrs. Smith is representing Publix where Student K has been learning job skills." This should be consistent across members. For example, do not refer to a parent as "Mom" or "Dad" while other team members are referred to by their names and titles.

- Start the meeting by explicitly saying something positive about the student.

    - "Student K has been a pleasure to have in class. He has made progress as a result of his effort and attitude."

Facilitate: Promote Discussion, Equal Voice, and Contributions

- During the meeting, encourage each participant to contribute.
  - Asking guiding questions to parents often solicits feedback as opposed to just an open call.

Example
- "Mrs. Jones, could you tell us how Student K responds to multi-step tasks at home?"

Example
- "Ms. Reyes, can you share how Student K handles transitions between activities at home?"

Non-Example
- "Mrs. Jones, do you have anything to add?"

Facilitate: Maintain Efficiency by Encouraging Consensus Building

- Ask questions to ensure agreement.

  - "Mrs. Jones, do you agree with the need we have established that Student K has difficulty following multi-step directions?"

- Redirect when necessary.

  - Bring up the goal of the meeting.

  - Reserve questions unrelated to the IEP for after the meeting.

Can you think of a time a meeting got off-track? Why? What strategies did you use to redirect the meeting?

Facilitate: Ensure All Team Members Understand Student Data

Reinforce and double check understanding of data.

Example:

"Student K received a 215 on the state reading assessment. This indicates he is below grade level. Students in his grade level must score a 255 to be considered on level. In reviewing sections, Student K's strengths were in locating main ideas, but he struggled with integrating key details. Does anyone have questions about this assessment or need more information?"

Facilitate: Summarize What Was Accomplished

- Reference the purpose related to accomplishments.

- Mention key determinations, recommendations, or services.

"For today's meeting our purpose was…"

"After reviewing the data, we all agree that…"

Virtual IEP Meeting Tip Sheets

Audience: Educators hosting virtual IEP meetings

Participating in Virtual IEP Meetings: Tips for IEP Team Members

Did you know that the Individuals with Disabilities Education Act (IDEA) allows individualized education program (IEP) teams to use "alternative means of meeting participation, such as video conferences and conference calls" (34 CFR §300.328)? No matter the format of the meeting, all required participants[6]—including parents[7]—should be present and/or appropriately excused from the meeting [if mutually agreed upon in writing; 34 CFR §300.321(e)(2)]. Below are tips for IEP team members for participating in virtual IEP meetings.

Before the Meeting	During the Meeting	After the Meeting
• Ask how student privacy will be protected.	• Follow student privacy guidelines.	• Follow student privacy guidelines.
• Share your technology concerns or potential barriers to your participation on the IEP team. Confirm participation.	• Begin with introductions and use video cameras, as appropriate.	• Provide signatures, if necessary.[8]
• Ask about the technology platform and the requirements for successful use.	• Listen closely and wait to share your thoughts and ideas until the current speaker finishes.	• Offer feedback on the virtual meeting process. Share any questions or concerns.
• Ask for an agenda for the virtual meeting and any meeting norms.	• Stop often and allow enough wait time for questions and feedback.	• Follow up if you do not receive a copy of the IEP by the expected arrival date.
• Ask if there is a back-up plan in case the technology does not work. What is it?	• Discuss and agree on the processes for obtaining forms or signatures, if necessary.	• Ensure that the IEP is implemented.
• Create your own back-up plan (e.g., print the documents, charge your phone, have the call-in number readily available).	• Confirm the method for delivering a copy of the completed IEP (e.g., mail, e-mail) and the anticipated arrival date.	• Continue to share student progress and any concerns with each other.
• Remove distractions and minimize background noise as much as possible.		• Develop a plan for addressing disagreements.
• Request interpreters or other supports, if needed.		• Resolve any conflicts as soon as possible at the local level. Use the dispute resolution option (e.g., IEP facilitation, mediation, written state complaint, due process) that best fits the situation to address any unresolved conflicts. Contact your state education agency or OSEP-funded parent center for more information.
• If you anticipate any disagreements, develop a plan to address them.		

Discuss Any Follow-Up Activities

Activity

- Using the IEP Meeting Follow Up Activities sheet, create a "to do" of any follow up activities from the IEP meeting and list who is responsible.

Example:

1. The special education teacher will follow up with Mrs. Smith about training Student K in the new strategy.

2. 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.

3. Mrs. Jones will also start using this strategy at home to reinforce.

IEP Facilitation Reflection

How do I welcome people when they arrive?

Do the participants in my meetings equally participate?

How am I doing at keeping meetings on task and efficient?

Do I help all members understand data?

How do I typically summarize the meeting?

How do I document follow-up activities?

**Identify an aspect of facilitation for IEP meetings I can implement in my context.

Practice

Activity

- Watch the clips from the video, [Facilitated IEP Meeting.](#)

- While watching, complete the "What Do You Notice" handout. Identify what you saw, positives, and areas in need of improvement.

Handout:
"What Do You Notice?"

Section 2: Strengthening Collaboration

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HLP 1

- Collaborate with professionals to increase student success.

HLP 3

- Collaborate with families to support student learning and secure needed services.
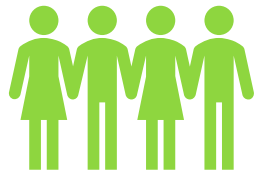
HLP 1: Collaboration High-Leverage Practices

HLP 1 Collaborate with professionals to increase student success.

HLP 2 Organize and facilitate effective meetings with professionals and families.

HLP 3 Collaborate with families to support student learning and secure needed services.

HLP 1: Key Elements of Collaboration with Professionals

Include Variety of Stakeholders

General education teachers, paraprofessionals, and support staff should all be part of the collaboration process.

Effective Communication

Share ideas, engage in active listening, questioning, planning, problem solving, etc.

Develop or Adjust Plans

Use student data to inform instructional or behavioral plan adaptations.

HLP 3: Key Elements of Collaboration with Families

Respectful Communication

Consider background, socioeconomic status, language, culture, and family priorities.

Advocate

Educators should advocate for resources to help meet instructional, social, behavioral, or transition goals. Support families in self-advocacy.

Encourage Students

Educators should encourage students to self-advocate and develop self-determination skills through the collaboration process.

Collaborating in Your Context

Who do you collaborate with on a regular basis?

Examples: Families, other educational professionals

Strengthening Collaboration

- **What strategies can assist in collaborating with other professionals?**
  - Cultivating positive relationships
  - Shared problem solving
  - Co-teaching considerations

- **What strategies can assist in collaborating with families?**
  - Ongoing communication
    - Topics
    - Modes
    - Supports needed and resources available

Collaborating with Professionals: Cultivating Positive Relationships

- Use non-verbal listening skills that include smiling, nodding and making eye contact.

- Share resources.

- Find common/shared connections and experiences.

- Find supportive statements to reinforce.

- Communicate in a timely manner.

Collaborating with Professionals: Shared Problem Solving

Use active listening skills, paraphrase, and ask clarifying questions.

Focus on data for challenging discussions.

Have a "working together" perspective.

Collaborating with Professionals: Shared Problem Solving

Example

"What I hear you saying, Judy, is you are frustrated with Student K because he is disturbing other students during group work. Let's take a look at last week's observation data together so we can work together to come up with some strategies."

Non-Example

• "Judy, I am pretty sure if you implement the strategies we discussed at the last IEP meeting, Student K would not be distracted. You just need to follow-through."

Collaborating with Professionals: Co-Teaching Considerations

Co-teachers should have a **shared vision** for their classroom and the students in it.

Effective co-planning is essential to ensure that staff expertise is maximized and that all students within the classroom succeed.

Co-teachers should agree upon and consistently implement **specified classroom management and organization.**

The Five-Step Process for Collaborative Planning

Step 1: **IDENTIFY** the academic standard, task, and performance requirement, or the expected social skill acquisition or behavior modification.

Step 2: **DISCUSS** the accommodations or modifications needed by the student. Identify the available materials and resources.

Step 3: **DECIDE** which strategies, modifications, and accommodations will be used. Decide who will be responsible for implementation.

Step 4: **MONITOR** the progress of implementation using formative feedback, and adapt the strategy, as needed, based on that feedback.

Step 5: **EVALUATE** the success of the implemented strategy.

Activity: Collaboration with Professionals

Think	Think of a student in your class who has an IEP or disability and/or is struggling in a certain area.
Use	Use the **Collaboration Plan: Five-Step Process handout** to plan how you will collaborate with your colleagues.
Consider	Make sure to consider potential barriers and how to overcome them.

Handout: Collaboration Plan: Five-Step Process

Collaborating with Families: Ongoing Communication Topics

- Happens when educators actively encourage families to participate in meaningful ways, and families support their children at home as well as at school.

- It is a mutually beneficial relationship.

Collaborating with Families: Ongoing Communication Topics

Student development and learning

Challenges

Successes

High expectations

Family experiences

Collaborating with Families: Ongoing Communication Modes

Scheduling events at times convenient for parents.

Informing families of special events that foster connections (e.g., Meet the Teacher Night, Coffee and Conversations with the principal, school tours, Family Fun Night).

Hosting parent nights that address parent concerns (e.g., Internet safety for children, free adult English classes, Your Rights as a Parent of a Child with a Disability)

Offering volunteer opportunities for parents (e.g., read to a class, guest speaker, car rider, line volunteer).

Collaborating with Families: Ongoing Communication Modes

Providing a translator when necessary and making information available in families' home language.

Providing opportunities to families to share about their family experiences.

Establishing regular communication about student/classroom (e.g., parent communication notebook, emails, phone calls).

Collaborating with Families: Supports Needed and Resources Available

Communicate with families about supports needed at home.

Provide families with resources that would be relevant to their situation or child.

Link to HLPs

HLP 1

- Collaborate with professionals to increase student success.

HLP 3

- Collaborate with families to support student learning and secure needed services.

Pause and Reflect on Practice

- Use the handout titled "My Collaboration."

- Identify some successes and areas of improvement for collaborating with families and professionals.

Handout:

My Collaboration

Challenges and Priority Needs

When considering facilitating IEP meetings and collaborating with the IEP team, what are your most common challenges?	When considering facilitating IEP meetings and collaborating with the IEP team, what is most pressing for your professional development needs?

Resources

Center for Parent Information & Resources (2020, April). *Virtual IEP Meeting Tip Sheets*. Center for Parent Information & Resources. https://www.parentcenterhub.org/wp-content/uploads/repo_items/virtual-iep-meeting-tipsheets.pdf

PROGRESS Center (2020, May). *Virtual IEP Meeting Sample Agenda*. PROGRESS Center. https://promotingprogress.org/resources/virtual-iep-meeting-sample-agenda

Thank You Alabama!