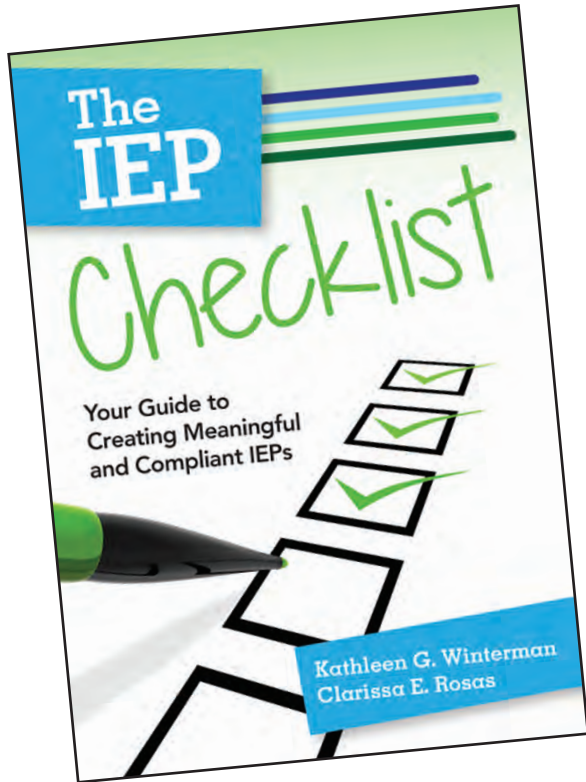


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# The IEP Checklist

## Your Guide to Creating Meaningful and Compliant IEPs

by

**Kathleen G. Winterman, Ed.D.**

Xavier University  
Cincinnati, Ohio

and

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By Kathleen G. Winterman, Ed.D., & Clarissa E. Rosas, Ph.D.

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# Collaborative Teaming for Better IEPs

Kathleen G. Winterman

**A** core principle of the Individuals with Disabilities Education Improvement Act (IDEA) of 2004 (PL 108-446) is the belief that parents are collaborative team members in the development of their child's individualized education program (IEP). IDEA was created for schools and parents to share equal responsibility in the process, ensuring that the child's needs are met (Fish, 2008). IDEA is based on the working relationship between the child's home and school, which fosters an educational team with the goal of providing the child with the agreed-upon services (Mueller, 2009). During the IEP meeting, the child's present levels, goals, objectives, placement, evaluation criteria, and duration of services are determined (Drasgow, Yell, & Robinson, 2001; National Dissemination Center for Children with Disabilities, 2013). IDEA empowers parents and school personnel to work together to develop a shared vision of what the child's educational reality might be. Often, this is not the reality. Unfortunately, due to the need to complete the IEP process, school personnel often choose expediency instead of true shared visioning for a student. With each reauthorization, IDEA has continued to strengthen the parents' role within the team meeting.

Collaboration between parents and professionals is one of the key elements of special education that is protected by IDEA. Collaborative teaming may be defined as two or more people working together toward a common goal in which all members have a role in the decision making (Snell & Janney, 2005). According to Clark (2000), collaboration within the schools is a method of solving the problems of teaching and learning in partnership with others, which requires shared thinking and engagement in interactive teaming by those who have knowledge to meet the needs of all students, whether culturally diverse, academically talented, or in need of special education. Consisting of a complex set of interactions that both build on and

influence the types of relationships being established, collaboration is considered an integral component of the IEP team process. Many individuals lack the necessary skills needed to effectively collaborate, and this may be one of the biggest challenges for educational teams, particularly when working together to develop effective IEPs.

Collaboration is a legal mandate that embodies best educational practice for the inclusion of children with special needs; however, barriers still exist that prevent the full implementation of IDEA, and these issues minimize a parent's ability to truly be a collaborative team member at the IEP table (Cheatham, Hart, Malian, & McDonald, 2012; Hernandez, 2013). Yet, with some guidance and direction as to the common purpose of the IEP meeting, the success of the team can be enhanced. Prior to the IEP meeting, the school personnel can contact the student's parents to determine their desires for their child's goals and objectives for the upcoming year. Providing parents with updates as to their child's goal attainment and academic successes can assist the team in determining the student's academic direction for the school year. True collaboration is a challenging task. To collaborate effectively, teams must be willing to work toward a common goal and acknowledge differing approaches and agendas, while incorporating opportunities for input with respectful and reflective listening.

## CONNECTION TO LEGAL PERSPECTIVE

Parents have the right to participate in every decision related to the identification, evaluation, and placement of their child and must give consent for any initial evaluation, assessment, or placement decision. As mentioned previously, the letter and the spirit of IDEA encourage a partnership between the parents and the school that promotes collaboration in order to provide appropriate services for the child (Mueller, 2009). The exact IDEA mandate is as follows:

- (a) General. The public agency must ensure that the IEP Team for each child with a disability includes—
  - (1) The parents of the child;
  - (2) Not less than one regular education teacher of the child (if the child is, or may be, participating in the regular education environment);
  - (3) Not less than one special education teacher of the child, or where appropriate, not less than one special education provider of the child;
  - (4) A representative of the public agency who—
    - (i) Is qualified to provide, or supervise the provision of, specially designed instruction to meet the unique needs of children with disabilities;
    - (ii) Is knowledgeable about the general education curriculum; and
    - (iii) Is knowledgeable about the availability of resources of the public agency.
  - (5) An individual who can interpret the instructional implications of evaluation results, who may be a member of the team described in paragraphs (a)(2) through (a)(6) of this section;
  - (6) At the discretion of the parent or the agency, other individuals who have knowledge or special expertise regarding the child, including related services personnel as appropriate; and
  - (7) Whenever appropriate, the child with a disability. (§ 300.321)

Although IDEA (2004) mandates that parents are part of the collaborative team, their roles are not clearly defined or elaborated on to give all parties a distinct understanding of how the team should evolve. According to *Whose IDEA Is This?* (Ohio Department of Education, 2012), a free guide to understanding IDEA, parents are to participate in IEP meeting activities by sharing information, assisting with the development of annual goals and objectives, assisting in the determination of related services, and consenting to special education and related services. IDEA 2004 clearly recognizes the special role of parents as it clearly defines the essence of parental consent. Specifically, IDEA states

- (a) The parent has been fully informed of all information relevant to the activity for which consent is sought, in his or her native language, or through another mode of communication;
- (b) The parent understands and agrees in writing to the carrying out of the activity for which his or her consent is sought, and the consent describes that activity and lists the records (if any) that will be released and to whom; and
- (c)
  - (1) The parent understands that the granting of consent is voluntary on the part of the parent and may be revoked at any time.
  - (2) If a parent revokes consent, that revocation is not retroactive (i.e., it does not negate an action that has occurred after the consent was given and before the consent was revoked). (§ 300.9)

Ultimately, IDEA defines the players but does not provide a roadmap to allow for the collective goals of true *teaming* in order to benefit the child. To act in the child's best interest, all IEP team members (i.e., parents, teachers, special educators, related service providers, administrators) must come to the table ready to listen and work together to develop a meaningful IEP.

As the team prepares for the IEP meeting, the lead team member—who is often the special educator (but any person can fulfill this role)—should prompt the team to think about ways in which all members can have an equal voice. One way to do this is to ask each team member ahead of time to share any questions or ideas for potential goals and objectives he or she may have so that everyone has time to reflect prior to the meeting. This also lays a good foundation for future dialogue among team members.

The following Challenge Scenario presents an example of collaboration between a parent and a teacher as they prepare for an upcoming IEP meeting and work together to determine the next steps for supporting a young student with a disability. Each comes to the table with her own set of experiences and expectations, leading each to a different approach to work toward the desired outcome.

## Challenge Scenario

### ***Parent's Reflection on Previous Meetings***

*I have been to IEP meetings for the past 3 years, and the results have always been the same—nothing changed. Each year went by and my son,*



*Jimmy, was still lagging behind his classmates and seemed to be getting further behind. I questioned why I should even bother going to the meetings. The teachers already seemed to know what they were going to do regardless of what I said. We have tried every therapy known to man and have spent thousands of dollars a year on outside support, but the school has never appeared interested in learning more about what we are doing at home or what our goals are for our son.*

*And this has always bothered me because I know that other schools do things differently. I have heard my friends talk about really being included in their child's IEP meetings. I have even heard of the students not only attending the meetings but also actually leading various parts of it. And so I was prepared for this upcoming meeting to be the same old thing.*

*But this time, when the special education teacher called to see if I could be available for an IEP meeting in 2 weeks, she actually asked me what time would be convenient for me. She also sent me an update on all of Jimmy's current goals and objectives, and then she called me again to ask me what I thought the priorities should be in Jimmy's IEP. She has even met with Jimmy to review all of his current goals and asked him what he wanted to focus on during the next academic year. I have also received updated reports from all of the distinct therapists and specialists who are currently working with him. Looks like things will be different this time. I like the change.*

### **Teacher Background Information**

*A bachelor's degree in the science of education is what it says on my college diploma. I have wanted to be a special educator ever since I started volunteering with children with special needs at my church. I am a new teacher at this school, and I am excited and nervous about starting to have IEP meetings with my students' parents. My college experiences have prepared me for this, and I have looked forward to it for what seems like my entire life. At my new school, they call it "IEP season." This is the time of year when many students' IEPs need to be reviewed to stay in compliance with the federal law, IDEA, which mandates an annual review of the students' educational plans. Many parents do not seem like they want to be involved in the IEP development, though. This makes me wonder why. My cooperating teacher made it seem so easy when I was student teaching. He set up such an inviting and engaging environment for students and parents to participate. I know that I can do the same if the students and parents give me a chance.*

### **The Meeting Begins**

*"Welcome, Mrs. Bennett, it's so nice to see you again. Jimmy told me this morning that he was looking forward to the meeting. We are so glad that you could come. Jimmy, where would you and your mom like to sit? Mrs. Bennett, have you met everyone here today?"*



## Scenario Reflection

Based on the Challenge Scenario, discuss and note your initial thoughts regarding the following questions:

- How would you get the parents more involved in the individualized education program (IEP) process?
- How would you get the student to be an active team member?
- Why would parents become apathetic to the IEP process?
- How would you involve all team members?
- How would you get the dialogue started?

*After all of the introductions take place, each team member reviews Jimmy's successes and challenges in achieving his current goals and the supports and services that were necessary to achieve these goals. Jimmy is asked to state his goals for the upcoming year, and he states that he would like to be a police officer when he grows up, so he hopes to improve his reading skills over the next year. He acknowledges that he has struggled to read for years and is embarrassed if he is called on to read at school. He has had a reading goal on his IEP for the past 3 years with limited success.*



## Stop and Think!

Questions to prompt the individualized education program team's thinking:

- What motivates this student?
- What type of learner is this student?
- How can we blend a student's learning style with what motivates him or her as a learner?
- What are some strategies that can be used to help a struggling learner?
- How can we assist a student's learning while keeping his or her ego intact?
- What options have we already tried, and what level of success did we meet?

Note: These questions are included to promote reflection and consideration of optional responses to the scenario provided, requiring application, analysis, and synthesis of knowledge.

## TAKING A LOOK AT WHO IS AT THE IEP TABLE

During IEP meetings, the educational team must remember that there are multiple perspectives that intertwine during the dynamics of the meeting. The following sections present the various team members that typically participate at an IEP meeting. The IEP team represents the student's educational interests and must include the student's parent(s) or guardian, a regular educator (unless the student is in a segregated facility without access or expectation to participate in the general curriculum), an intervention specialist, a school district representative, and someone who can interpret the testing.

### The Student

Students should be involved in the IEP meeting, regardless of age. Students who are very young (preschool through first grade) can share with the team what they like about school, what they are really good at, and one skill they would like to improve, for example. As students get older, their roles can increase to leading discussions related to strategies that have been successful and why others have not been effective, as well as giving the team a better understanding of their rate of success on current goals and objectives. Older students can help the team with future planning and establishing the skills necessary to meet their personal aspirations. Once the team has the student's voice and motivation in mind, determining his or her goals and objectives becomes an easier task.

### Parents or Guardians

Parents or guardians are equal team members on their child's IEP team. The school is required to make multiple attempts to encourage parent or guardian participation. Parents or guardians are strongly encouraged to attend the IEP meetings due to their unique position to be able to share their child's life history and how it fits in with the family's culture and expectations. They share their child's hopes and dreams and help provide the roadmap to achieve these dreams. Parents provide a unique perspective in which they are able to share the student's interests and level of functioning at home and within the community. Parents also share the student's medical and social emotional history as well as hold knowledge of past strategies and their level of success. They can encourage the team to think creatively about the services required to meet the student's educational needs, which may lead to discussions of the least restrictive environment. Parents or guardians also carry the burden of living with the results of an effective or ineffective educational team. Long after a child is finished with the school experience, the parents will be there to support their child into adulthood and throughout his or her life.

While examining the shared responsibility of the student's IEP, the team must be cognizant that the services offered and their implementations are

the responsibility of the school and not the family or student. Some families supplement school services, but they are not obligated to fund the resources necessary for the child's successful realization of IEP goals, objectives, or services. The family's participation in the process is voluntary but critically valuable. It is mandatory that parents are invited but it is not mandatory that they participate. The burden of attempting to get the family to participate rests on the school, which should try to accommodate the family's schedule as much as possible. After several documented attempts to get the family to participate, the school can move forward without family participation.

### **General Education Teachers**

When IDEA was reenacted in 1997 and again in 2004, additional mandates required more specific information regarding the participation of children with disabilities in the general curriculum. Now, IEPs must include a statement with the present level of performance that addresses how the child's disability affects his or her progress in the general curriculum, along with program modifications. As such, the development of a child's IEP is no longer the exclusive responsibility of the special education teacher. General education teachers now are required to participate in the IEP meeting. This requirement provides a clear distinction that general education teachers have responsibility for the learning of all children. Students with disabilities now must fully participate in state and district testing or participate in an alternate assessment to monitor their progress in the general curriculum. Academic reporting is mandated to inform parents of children with disabilities on their child's progress at the same intervals as children without disabilities. Pertinent and timely information must be reported regarding the child's IEP goal attainment.

As mandated by the No Child Left Behind Act of 2001 (PL 107-110), general education teachers must have specific training in the content areas they teach, which is known as being *highly qualified*. Therefore, general education teachers possess the content knowledge of each subject area they teach, and part of their role in the IEP team is to share the academic expectations for that grade or subject matter. Their professional knowledge assists the team with establishing goals and objectives that are related to the content standards for all students in a particular grade or subject. General education teachers play a key role in the development and implementation of the IEP in order to assure students' academic success.

### **Intervention Specialists or Special Education Teachers**

An intervention specialist is an educator who is specially trained to deal with students who have learning challenges. Intervention specialists are knowledgeable about the educational laws and diverse learning strategies, and they are usually charged with implementing the educational programming

for students who qualify for special educational services, as mandated under IDEA. They are considered the primary source of knowledge for developing accommodations and modifications, monitoring the child's academic programming, and reporting the child's goals attainment. Depending on the student's academic needs, the intervention specialist might be the child's teacher of record, but it is more likely that he or she will support the child within the child's grade level or a particular subject area. The teacher of record may or may not be the student's "primary teacher," but is the person who grades the student and so must be highly qualified in the areas in which the child is being taught. Most intervention specialists support students in these settings by co-teaching with general education teachers. Like general education teachers, intervention specialists must be highly qualified in the content areas that they teach (PL 107-110; PL 108-446).

### **Administrator**

The term *administrator* is a bit of a misnomer. The role really represents the person from the public school district that is capable of authorizing district funds to provide the services necessary to meet a child's unique learning needs. This responsibility can be charged to a multitude of personnel from the school district, including directors of special services, building principals, assistant principals, school psychologists, counselors, or other educational staff members. This person should be capable of designing services for the student or supervising these services. The individual should also be knowledgeable of the general education curriculum.

Finally, the IEP team must have someone from the school who is able to interpret the data in attendance as well. Many times this is a school administrator, but not always. This role could be fulfilled by the administrator, general educator, intervention specialist, school psychologist, or related services provider such as an occupational therapist or speech and language pathologist.

### **Related Services Personnel**

Depending on a child's needs, a variety of related services providers may also be represented on the IEP team. These staff members include, but are not limited to, speech-language pathologists, occupational therapists, physical therapists, school nurses, school counselors, mental health professionals, and school psychologists, as well as the child's private services providers. Although these professionals may be included in the IEP meeting, their attendance is not mandatory unless the services they provide are directly related to the goals and objectives discussed. Private services providers are able to share their opinion of the child's skills within the family and in relation to the outside community. These professionals often have a long-term relationship with the child and family and have seen their growth and struggles over a period of years.



### Stop and Think!

There are many advocacy groups that are available for parents. Some are local organizations within specific school districts, whereas others support specific disabilities. The following list provides examples of national organizations that are available to provide guidance to families:

- The American Association on Intellectual and Developmental Disabilities (AAIDD) is an organization that promotes research for individuals with intellectual disabilities.
- The Autism Society of America advocates for services, access, and opportunities for individuals with autism spectrum disorders.
- The National Alliance on Mental Illness (NAMI) focuses on support for individuals with mental illness and their families.
- TASH is an international group for people with disabilities.
- Yellow Pages for Kids with Disabilities is a collection of advocacy materials from each of the 50 states.

### Parent Advocate

Some families seek out the assistance and advice of a parent advocate. An advocate may be a school employee or someone from the community who is financially compensated or who serves in a volunteer capacity to advise the child's parents or guardians. Often this person is able to help a child's parents understand what professionals are telling them, or the advocate can speak on the family's behalf. Some families like having someone to support them through the IEP process especially if they have been disappointed in the outcome of previous meetings. Advocates are not necessary for the meeting to take place.

Active parental involvement in the IEP meeting is the cornerstone of the collaborative team process. According to Lo (2012), strong parental involvement is reflective of a culture that values individualism, equality, and exercising one's rights. These values are not always shared by the families, however. A family's culture can play a large role in how they perceive their child's special needs and the role they play within the IEP meeting. The IEP team must be respectful of the family's culture and communicate clearly and effectively to enable parents to be active, equal team members. To curtail the involvement of parents in the educational decisions not only denies parents their rights to full participation, which is protected under legislation, but sets barriers for them. Such barriers can be even more problematic for families

from different cultural and linguistic backgrounds who often have different perceptions of how decisions are made.

## STUDENT-LED IEP MEETINGS

Student-led IEP meetings are an important way to help improve parent participation and increase student involvement and commitment to the process, all the while creating a more supportive environment for students within the general education setting (Mason, McGahee-Kovac, & Johnson, 2004; Myers & Eisenman, 2005). By actively participating and leading their own IEP meetings, students learn to demonstrate goal setting, planning, self-evaluation, public speaking, and self-advocacy skills in an authentic setting that is uniquely their own (Martin et al., 2006).

In a 3-year study of more than 1,638 IEP meetings, special education teachers did a majority of the speaking, whereas general education teachers and students did not feel comfortable speaking (Martin, Marshall, & Sale, 2004). Often, students did not understand their role or why the meeting was being held. Students must be directly taught how to participate in these high-stakes meetings. Once they are taught, students learn to advocate for their own learning needs, and their participation levels increase (Martin et al., 2006). Teaching students to be active members in their IEP meetings is just one means for fostering self-determination (Eisenman, Chamberlin, & McGahee-Kovac, 2005; Thoma & Wehman, 2010).

Preparing students to lead their IEP meetings provides them with an authentic opportunity to learn and practice critical life skills, as well as many other related skills. To assist students in the task of leading their IEP meetings, they must be educated about their disability. Students should be trained over a minimum of four to six sessions in which they discuss their future plans, discuss their current level of performance, and seek out recommendations for goals from their teachers and parents, as well as develop their own goals, and learn their legal rights to an appropriate education (Mason et al., 2004).

Generally, the special education teacher will assist in training the students to be prepared for their IEP meetings. Students need to be aware of their strengths and weaknesses to determine the future supports they require. Students learn what will happen at the IEP meeting and what purpose the IEP serves. In preparing for the meeting, students should learn how to determine an agenda by identifying what is important to them and should be given an opportunity to role-play prior to the meeting. Teachers can use this time to prompt students' thinking by offering them potential questions that they may be asked. Mason, McGahee-Kovac, and Johnson (2004) suggested that there are three levels of student participation in a student-led IEP meeting. First, students share their future

goals or plans. Next, they discuss their strengths and weaknesses and the necessary accommodations for success while also being able to offer potential goals. Finally, students assert the previous information and close the IEP team meeting.

## DEVELOPING THE TEAM

In addition to the family's culture, each individual team has its own unique culture. According to Dabkowski (2004), who and what the team values will have an impact on the team's interactions. Similarly, how the meeting is structured, the environment, and the complexity of the language and written documents all have an impact on the likelihood of the parents' involvement within the meeting (Winterman & Rosas, 2014). All of these nuances create the dance that becomes the art of collaboration in an IEP meeting.

Throughout the collaboration process families are dealing with their aspirations for their child while facing the reality that may offer a different picture. These issues coupled with the complexities of the IEP forms and the emotions surrounding the circumstance of the meeting often can create barriers that impede a family from fulfilling their role in the IEP team meeting. The goal of every IEP team member is to find a common ground and work together to develop an educationally sound, truly individualized, effective document that can serve as a guiding force for the student.

To begin the IEP meeting, the team members all must believe that they are there for the student's benefit, and all outside roles and responsibilities should be secondary. Because the student is the main focus of collaboration during an IEP meeting, it is important to honor the perspective of the student, using student-centered planning to promote student empowerment and eventual leadership. Prior to the meeting, the student and family should be prompted to think of their vision for the future. What type of schooling experiences will be necessary to reach those future dreams? Will the student live independently or require assistance? What type of work or career does the student aspire to achieve? The answers to these questions lay the foundation of the discussion within the IEP meeting. For a preschool student who wants to be a professional athlete, the focus of the IEP could be based on learning how to count and recognize money. For an elementary student with a behavior disorder who wants to grow up to be a fire fighter, learning how to get along with others would be a desirable skill. Establishing goals and objectives lays the foundation for the meeting and the services provided for the student in the future.

These future dreams all unfold within the IEP meeting. Often, team discussions can get bogged down with only thinking about the present. The collective team must maintain its sights clearly on the future and the larger



picture that represents the child's life. As the student grows and develops, the makeup of the team may evolve to reflect its members' strengths, interests, and life goals. The special factors discussed at the end of this chapter will assist the team in exploring questions and areas that are not addressed in other areas of the IEP yet can have an impact on the direction the team takes in developing goals and objectives.

### **Conflict Resolution**

Inherent within any human interaction is the possibility for conflict to arise. An essential skill to effective collaboration is managing conflict. Maintaining the meeting's focus on the child's needs will assist in moving the discussion forward. As a means to stimulate these conversations, the special factors prompt below can help initiate the dialogue.

If disagreement among the varying parties continues, several steps can be taken. The meeting can be stopped and resumed at another time after additional information is gathered. New or additional resources and personnel can be included to assist with the disagreement. And, if necessary, mediation might be needed to help determine the best direction for the team. The parent maintains the right to sign the IEP to show their attendance but they can choose to refuse to consent to the services and implementation of the IEP. Maintaining an amiable relationship with all team members is in the best interest of the child.

Developing goals and objectives is a mutual activity in which the collective thinking of the team must be represented. It is a mutual task. The team represents the varying interests that reflect the different aspects of the child's life. Each team member shares equally in the responsibility for key decisions as well as accountability for the outcomes of the student's IEP, both its successes and failures. Demonstrating mutual respect for each team member and their perspective allows the team to work to honor the role they represent in the child's life.

### **Special Factors**

What follows is a section of the IEP rubric in which the special factors are considered. These issues are global issues that have an impact on the IEP team's dialogue and set the stage for further conversation that shapes the goals and objectives.

## CHECKLIST

<b>Special instructional factors</b>	<b>Discussion needed</b>	
	<b>Yes</b>	<b>No</b>
Does the child have behavior that impedes his or her learning or the learning of others?	<input type="checkbox"/>	<input type="checkbox"/>
Does the child have limited English proficiency?	<input type="checkbox"/>	<input type="checkbox"/>
Is the child blind or visually impaired?	<input type="checkbox"/>	<input type="checkbox"/>
Does the child have communication needs (required for individuals who are deaf or hearing impaired)?	<input type="checkbox"/>	<input type="checkbox"/>
Does the child need assistive technology devices and/or services?	<input type="checkbox"/>	<input type="checkbox"/>
Does the child require specially designed physical education?	<input type="checkbox"/>	<input type="checkbox"/>
Will the child participate in statewide testing?	<input type="checkbox"/>	<input type="checkbox"/>

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### ACTIVITY

The activity included in this chapter is intended for the reader to gain a deeper understanding of the content covered. The activity associated with this chapter is

- Activity 2.1. Collaborative Considerations



**Activity 2.1.**

**Collaborative Considerations**

**Supporting chapter:** Chapter 2 (Collaborative Teaming for Better IEPs)

**Purpose:** The purpose of this activity is to develop an appreciation for collaboration when designing an individualized education program to meet the student’s needs.

**Directions:** Consider a child with special needs. Work with your team to generate factors that should be considered when planning instruction and services for the student.

Factors to consider	Pros	Cons
Level of support needed in the general education classroom		
Physical supports needed (e.g., mobility needs, strength and endurance issues)		
Academic supports needed (e.g., modifications or content changes to the curriculum)		
Academic access (e.g., accommodations such as amount of work to complete, preferential seating)		
Physical access (e.g., adaptive equipment such as weighted pencils, slant boards, specialized seating)		
Teacher beliefs on inclusion		
Teacher supports needed (e.g., curriculum at another level)		