



Hillsborough County
PUBLIC SCHOOLS
Excellence in Education

WRITING QUALITY IEPs

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The Individual Educational Plan (IEP)

The federal law and State Board of Education Rules require that students with disabilities have an IEP. The IEP is a legal document which must be reviewed at least annually, or more frequently, as necessary.

Parents must be invited and encouraged to attend and participate in the IEP Team meeting.

The IEP consists of written statements including a statement of the student's present level of academic achievement and functional performance. This must include how the student's disability affects the student's involvement and progress in the general curriculum; or for preschool children, as appropriate, how the disability affects the child's participation in appropriate activities.

The IEP documents the educational needs of students with disabilities who require special education and related services. The IEP components are addressed based on the individual needs of a student so that the student may derive educational benefits from special education and related services, and so that each student exits school prepared for postsecondary life with the skills needed to maximize his/her potential as a productive citizen.

The Law

The Individuals with Disabilities Education Act (IDEA 2004) emphasizes involving students with disabilities in the general curriculum.

The federal law, the Individual with Disabilities Education Act (IDEA 2004), contains the following requirements:

- Students with disabilities must have an IEP.
- The IEP must be revised at least annually, or more frequently as necessary. (School personnel and/or parents may request that an IEP Team reconvene at any time if the need exists to revise the current IEP.)
- Due process must be guaranteed.
- Records must be confidential.
- Parents must be invited and encouraged to attend the IEP meeting.
- Student evaluation procedures must be nondiscriminatory.
- Parents must be notified of their child's progress toward the annual goal(s) of the IEP at least as often as progress is reported to parents of children without disabilities.
- The IEP Team must include the Regular Education Teacher of the student if the student is or may be participating in the general education environment.
- Per federal law, transition **planning** and the need for transition **services** must be addressed by age 16. (However, Florida State Board Rules address that transition planning must begin by age 14. Therefore, the Transition IEP in Hillsborough County Public Schools is used for students who are or will be 14 years old during the duration of the current IEP.) Students must be invited and encouraged to participate in Transition IEP meetings.
- Parents must be included (invited and encouraged to attend) in any meeting that results in decisions regarding their child's educational placement.

The Philosophy

The overall philosophy for creating an IEP is to **individualize** the educational program for students with disabilities. An Individual Educational Plan (IEP) is written for each student with disabilities based on his or her unique needs.

The IEP Team

MEMBERS OF THE IEP MEETING – WHO, WHAT, WHY

The IEP Team collectively makes appropriate educational decisions in the best interests of the student. Each member will contribute his or her experience, knowledge and training as the IEP Team develops an appropriate IEP for the student.

The IEP process must begin by having **all personnel (teachers, therapists, parents, student when appropriate, representatives from outside agencies when applicable, etc.) who are involved in a particular student's learning environment** work cooperatively to develop Annual Goals and Short Term Objectives (as appropriate) for the student, as well as addressing additional educational needs and services.

ESE Case Manager – This is typically the ESE Teacher/Therapist who provides the majority of the ESE services to the student. The Case Manager is responsible for keeping track of IEP review dates, scheduling meeting dates, sending meeting invitations, coordinating evaluations and/or assessments, distributing and collecting planning notes and generally overseeing all aspects of the student's IEP process.

The **Case Manager** ensures that:

- all necessary actions and preparations occur prior to the IEP Team meeting in a timely manner (e.g., obtaining planning notes, drafting present level, providing written notification to parents 7 to 10 days prior to the IEP Team meeting, etc.);
- the proper IEP procedures and agenda are followed during the IEP Team meeting;
- the results of the IEP Team meeting are documented properly;
- the parents receive a copy of the IEP immediately upon the conclusion of the IEP Team meeting;
- the IEP is filed appropriately in the Cumulative Folder and Student Resource Folder, and sent to Central Files (as applicable, only for students with a Matrix ESE Support Level 4 or 5);
- all service providers are informed of their responsibilities.

For more detailed information regarding Case Manager responsibilities in preparing for IEP Team meetings, see the section titled "Planning/Preparing/Facilitating/Finalizing the IEP."

The Roles and Responsibilities of IEP Assistants: IEP Assistants provide clerical assistance to ESE Case Managers with the IEP meeting scheduling process, and paperwork issues (such as copying documents and filing and routing of the copies following the meeting). IEP Assistants do not make decisions relative to the IEP process. They perform their duties at the direction of the ESE Case Managers and ESE Specialists/Leads/Contacts at their school sites. IEP Assistants also provide class coverage during the times that IEP meetings and/or collaborative planning are taking place.

IEP Team Members

Federal law and regulations, State statutes and State Board of Education Rules mandate that specific individuals must be included as members of the IEP Team.

The members of the IEP Team must include, but are not limited to:

- **Parents** of the student
- Not less than one **Regular Education Teacher** of the student (when the student is or may be participating in the regular education environment)
- Not less than one **ESE Teacher/Therapist** of the student
- An **LEA (Local Educational Agency) Representative**, an individual who is a representative of the school district; is qualified to provide, or supervise the provision of, specially designed instruction; is knowledgeable about the general education curriculum; and is knowledgeable about the resources of the school district

- **Evaluation Representative**, an individual who can interpret instructional implications of evaluation results
- Other individuals at the discretion of the parent or school district. Parents and the District may invite individuals who have special expertise or knowledge of the student to the IEP Team meeting to serve as IEP Team members. Additionally, parents may bring other individuals of their choosing to the IEP meeting. District/school personnel must not object to the attendance of such adult(s) or discourage or attempt to discourage, through any action, statement, or other means, parents from inviting another person of their choice to attend the IEP Team meeting. If parents believe that they are being discouraged from bringing an individual of their choosing to the IEP meeting, they should inform a district/school administrator immediately so that they are assisted by administration prior to the meeting, including rescheduling the meeting, if necessary. At the conclusion of the IEP meeting, the parents and school district personnel attending the meeting shall sign a document which states whether any school district personnel have prohibited, discouraged, or attempted to discourage the parents from inviting a person of their choice to the meeting. The form titled “Parental Input and Meetings” (SB34519) is used for this purpose.
- **Student**, when appropriate
- **Agency representative(s)**, when applicable and with the required written consent of the parent

PARENT/GUARDIAN/SURROGATE*

Parents are a vital and **required** component in the planning of a student’s educational goals. No one is more concerned with a child’s ability to be a successful student and productive citizen than the child’s own parent. Federal law requires that parents have input in the creation of their child’s Individual Educational Plan. Parents are privy to many insights into their child’s abilities, habits, behaviors, likes and dislikes that other members of the IEP Team will find relevant and useful in the IEP planning and development process.

Note: A Surrogate Parent is assigned by the District for exceptional students who do not have a parent or guardian who can act in their educational interests. The Florida Department of Education has published a *Technical Assistance Paper* on the topic of “Surrogate Parents” which is available online, at:

<http://info.fldoe.org/docshare/dsweb/Get/Document-4273/k12-07-23memo.pdf>

The District’s ESE *Fast Facts #11* addresses the topic of “Surrogate Parents” and there is a chapter in the online *Understanding Compliance Issues* manual on the topic of “Surrogate Parents.” The ESE Team at each Area Office is available to assist when an exceptional student is in need of a Surrogate Parent or when additional information regarding Surrogate Parents is needed by school personnel.

REGULAR EDUCATION TEACHER

Likewise, teachers in the general education environment (**Regular Education Teachers**) hold a special insight into the requirements necessary to be successful in the general education environment. According to federal law, the members of an IEP Team must include not less than one regular education teacher of the student for a student who is or may be participating in the general education environment.

Parents may give their written consent (see form SB89003) to excuse the regular education teacher’s attendance at the IEP meeting, provided that written input is provided by the excused regular education teacher of the student in advance of the meeting to the parents and to the IEP Team. The parents and the IEP Team may agree in writing to excuse the regular education teacher’s attendance, in whole or in part, when his/her area of the curriculum is not being discussed. This written agreement will be documented on a Conference Summary form (MO-31), in the “Additional Comments” section of the IEP, or written directly on the Regular Education Teacher signature line of the IEP. For additional information regarding participation of “regular education teacher” at IEP meetings, please access the following Fast Facts: #25 *The Pre-K Child and Regular Education Teacher as Member of the IEP Team*; and #27 *Regular Education Teacher as Member of the IEP Team*.

ESE TEACHER/THERAPIST/PROVIDER

Each IEP Team meeting **must** include at least one **ESE Teacher/Therapist** currently serving or anticipated to serve the student. If the student has an ESE Teacher and other ESE service providers, the ESE Teacher

must attend, as the ESE Case Manager who serves the student the greatest amount of time. It is expected that all ESE service providers will attend as IEP Team members, as well. However, parents may give their written consent (see form SB89003) to excuse ESE service provider(s) from attending the IEP meeting, provided that written input is provided by the excused ESE service provider(s) in advance of the meeting to the parents and to the IEP Team. Additionally, the parents and the IEP Team may agree in writing to excuse ESE service provider(s) from attending the meeting, in whole or in part, when his/her area of the curriculum or related services is not being modified or discussed in the meeting.

LEA REPRESENTATIVE

An **LEA (Local Educational Agency) Representative** is a required participant at all IEP Team meetings. This must be someone who represents the District, is knowledgeable about the general education curriculum, and also the availability of resources of the District. The LEA Representative is someone who is qualified to provide, or supervise the provision of, specially designed instruction to meet the unique needs of students with disabilities. This role may be filled by an ESE Teacher who does not provide direct service to the student; an ESE Specialist; or other District ESE personnel appointed as designee. The LEA Representative signs on the LEA signature line and may not sign the IEP more than once. **The signature of the LEA Representative is required on all IEPs.** The LEA Representative may not sign as Evaluation Representative. Only personnel actively employed in an ESE position are permitted to sign as LEA Representative. For example, an individual employed as Guidance Counselor who holds ESE certification as well as Guidance certification may **not** sign as LEA Representative.

EVALUATION REPRESENTATIVE

We, as educators, are familiar with many tests, acronyms and language associated with our profession. However, not everyone is familiar with or always understands the results of every evaluation or assessment tool used to evaluate students. The IDEA requires that **one representative** of the IEP committee must be identified **to interpret and explain** the educational implications of any tests, evaluations or assessments. The individual who fulfills this role is described as the **Evaluation Representative**. The ESE Teacher may act as the Evaluation Representative. If this is the case, the ESE Teacher will sign on **both** the ESE Teacher signature line and the Evaluation Representative signature line. The Evaluation Representative signature line should not be left blank. The LEA Representative may not sign as Evaluation Representative.

STUDENT

Students who are or will be 14 years or older during the duration of the IEP must be invited to their Transition IEP meetings. If the student cannot attend the meeting, there must be documentation of methods used to obtain the student's input.

AGENCY REPRESENTATIVE(S)

For students 16 years or older during the duration of the IEP, by federal law, the District must invite a representative of any agency that may be responsible for providing or paying for transition services. **Informed written parental consent must be obtained prior to inviting the agency representative** (see form SB89003). Form SB89003, *Consent Form to Excuse the Attendance of IEP Team Member and/or Invite Agency Representative(s)* is to be used to obtain the parent's consent for inviting an agency representative to a particular IEP meeting, and must be completed and provided to the parent **prior to each IEP meeting** before inviting an agency representative to that particular IEP meeting.

The *Transition Consent Form to Share Information* (SB89812) is used to obtain parental consent for the sharing of information with agency representatives or other personnel outside the District. This form does not have to be addressed more than once as long as the parent continues to consent to the sharing of information. All parental consent forms regarding agency personnel are student records and must be maintained and filed appropriately. The routing and distribution list appears at the bottom of the forms.

Planning/Preparing/Facilitating/Finalizing the IEP

Before the IEP Team Meeting**

- Case Manager discusses the proposed meeting date and time with all parties involved in the IEP Team meeting.
- Case Manager establishes the meeting date, time and place.
- Case Manager requests Planning Notes from all teachers/service providers. Information contained in the Planning Notes should include information about the student regarding:
 - ▶ Strength and needs of the student, including parents' concerns
 - ▶ Present levels of performance/challenges in the areas of Curriculum & Instruction, Social/Emotional, Independent Functioning, Communication, Health Care, and for transition-age students, present level information regarding Community Experience, Daily Living Skills, Post School Adult Living Skills, Employment/Training, and Functional Vocational Assessment and a description of the student's abilities/needs in the area of self determination/self advocacy skills should be addressed
 - ▶ Attendance, attention, homework completion, etc., as applicable
- Case Manager establishes methods to include student participation if the student will be 14 years or older during the duration of the IEP.

Domains and transition service areas serve as a global frame of reference to organize thoughts and probe for data. Planning Notes are filed in the Student Resource Folder. (NOTE: Students may complete their own Planning Notes as appropriate).

NOTE: Planning Notes may be used to document Regular Education Teacher's input (or the input of other ESE service provider) at the IEP meeting (in lieu of that IEP Team member's presence at the IEP meeting), ONLY if the parent has given written consent to excuse the Regular Education Teacher or ESE service provider from attending the IEP meeting and only when Planning Notes or other written input from the excused IEP Team member has been provided in advance of the meeting to the parents and to the IEP Team. When Planning Notes are used in this manner, they are to be attached to the IEP and filed in the Student Resource Folder and in the ESE Documents Folder in the Cumulative Folder. Parents receive a copy of these Planning Notes as well, and they are sent with the copies of the IEP, and related documents, to Central Files (as applicable, only for students with a Matrix ESE Support Level of 4 or 5).

- Service providers evaluate the data regarding student's progress toward mastery of Annual Goals.
 - Based on available data from all teachers/service providers, a draft Present Level Narrative is created
 - At least 7 to 10 days prior to the meeting date, Case Manager sends to the parents:
 - MO-12 (*Prior Parent Notification*) with all appropriate information noted [**NOTE:** *The MO-12 must include that the purpose of the meeting is to discuss diploma options and to consider/identify: needed transition services (for students aged 14 years or older during the duration of the IEP or in the 8th grade, whichever comes first); and postsecondary goals and transition services (for students aged 16 years and older during the duration of the IEP.)*]
 - Blank *Planning Notes* (SB89008)/Family Letter
 - Any new evaluation reports
 - Draft Present Level of Academic Achievement and Functional Performance and
 - *Part B Procedural Safeguards Notice* (must be provided at specified times per federal law, including at least one time per school year)
- NOTE: Caution and attention to FERPA (Family Educational Rights and Privacy Act) should be exercised when sending student information to parents. Envelopes must be sealed appropriately. U.S. Mail should be used, when necessary, to ensure confidentiality.

- *Consent Form to Excuse the Attendance of IEP Team Member(s)/Invite Agency Representative(s)* (SB89003), when applicable
- Case Manager maintains a copy of the *Prior Parent Notification* form (MO-12) and all relevant documents for own records.
- Case Manager documents responses from parents on *Prior Parent Notification* form (MO-12). If no response is received, Case Manager sends a second MO-12 for the same meeting date and time. If no responses are received, Case Manager calls parents prior to the designated meeting date/time to remind them of the meeting. (See “Prior Parent Notification” section for more detailed information.)
- Case Manager reviews Part IV of the *Prior Parent Notification* form (MO-12) with the parent, and requests that the parent checks the applicable statements, signs and dates Part IV, if the parent has not already done so. If the parent checks the statement indicating that he/she was discouraged from bringing an individual of his/her choosing to the IEP meeting, an offer must be made to the parent to reschedule the meeting so that the individual at issue may attend. Written documentation of this offer to reschedule must be maintained, either on a Conference Summary form, or in the IEP document itself.
- Case Manager addresses any parental requests for audio recording the meeting with the IEP Team by following the District’s *Policy on Recording of IEP Meetings*, which may be accessed via the online SP&P document. The presence of a court reporter and/or video recording is not allowable.

During the IEP Team Meeting

- **CASE MANAGER:**
 - Chairs the IEP Team meeting.
 - Introduces participants and explains their role at the IEP Team meeting (e.g., explains who will fill the role of Regular Education Teacher, who will serve as Evaluation Representative, etc.).
 - Explains the purpose of the meeting and establishes an agenda.
 - Facilitates the sharing of information.
 - Ensures proper documentation of paperwork and secures signatures of IEP Team members upon completion of the IEP development/review/revision process.
 - Ensures that the agency has provided services as indicated on the Transition IEP, if applicable; and if not, the Case Manager is responsible for follow up with the agency. When needed, the Transition IEP Team must reconvene to identify alternate strategies.
- **IEP TEAM MEMBERS:**
 - Share relevant information regarding student’s current levels and needs to assist in finalizing IEP content, including present level narrative, goals and objectives, services, etc.
 - Offer their input in developing an appropriate IEP for the student.

After the IEP Team Meeting**

- **CASE MANAGER:**
 - Distributes the original IEP, any prior written notice forms that apply to the meeting, any applicable consent forms, and form SB34519 (used for parents and all other IEP Team members to attest whether or not the parents were prohibited, discouraged, or attempts were made to discourage the parents, from inviting a person of their choice to the IEP meeting) to the Cumulative Folder (within ESE Documents Folder) and copies of the IEP to parents, Principal/Cumulative Folder, ESE Student Resource Folder, and Central Files (as applicable, only for students with a Matrix ESE Support Level 4 or 5).
 - Informs all service providers of their responsibilities related to implementing the IEP and of any specific accommodations, modifications, and supports that must be provided to the student or school personnel in accordance with the IEP.
 - Ensures that progress is reported to parents as documented on the IEP.
 - Completes Matrix of Services form per district guidelines. (See Fast Facts # 20.)

• **SERVICE PROVIDERS:**

- Implement the IEP as written.
- Maintain data on student's progress towards mastery of the goals and objectives and provide appropriate information to Case Manager.

****The Case Manager will direct the IEP Assistant in fulfilling some of the activities that occur before and after the IEP meeting.**

Overview of IEP Components

METHODS USED TO ENCOURAGE AND INCLUDE PARENT PARTICIPATION (I)

Parents must be invited and encouraged to attend IEP Team meetings. Check all methods that apply.

PROCEDURAL SAFEGUARDS (II)

The *Part B Procedural Safeguards Notice* contains a full explanation of protections and rights under Part B of the Individuals with Disabilities Education Act (IDEA 2004), the U.S. Department of Education regulations, and corresponding State requirements. This notice must be provided to parents at specified times, including at least one time per school year.

TRANSITION (III)

The student is or will be 14 years or older during this duration of the IEP (or in the 8th grade, whichever comes first).

Methods used to encourage and include student's preferences, interests, participation, and input:

Student input may be obtained from attending the meeting, planning notes, student conferences, interest inventories, and other methods. Check all that apply.

PRESENT LEVELS OF ACADEMIC ACHIEVEMENT AND FUNCTIONAL PERFORMANCE (IV, V)

Present level narrative must include:

- √ Statements of **individual** student **performance** that describe what the student is currently able to do using **specific** student **information** and **sources**
- √ Most recent **evaluation/reevaluation** results, and/or other **assessments** and/or **observations**, such as age-appropriate transition assessments
- √ Narrative statements describing **statewide/district assessments** and/or **alternate assessment** results (Grade level information must be described in an understandable, narrative format and must be supported by state/districtwide assessment. These assessments may also serve as transition assessments.)
- √ Input from the Special Education (ESE) and Regular Education Teachers, any other service providers or individuals knowledgeable of the student
- √ Information/concerns from the parents, including the consideration of any outside evaluations and/or independent educational evaluations (IEEs) that may have been conducted by qualified evaluators
- √ **Strengths, skills, behavior, characteristics** related to the curriculum
- √ Classroom performance
- √ Intervention strategies used/needed
- √ **Review of progress on previous goals and objectives**
- √ Priority educational needs
- √ Description of what the student **needs** to learn to **progress** in the general curriculum in **objective and descriptive terms**
- √ Description of student's individual needs for **special education services/supports**

Present level narrative should consider needs in the following areas:

- √ Curriculum/Learning Environment
- √ Social/Emotional Functioning
- √ Independent Functioning
- √ Health Care Needs
- √ Communication
- √ For transition-age students: Instruction, Community Experience, Daily Living Skills, Post-School Adult Living Skills, Employment/Training, and Functional Vocational Assessments
- √ Self Determination/Self Advocacy

Other areas to address in the IEP for transition-age students include:

Course of Study/Diploma Option

Measurable Postsecondary Goals

Age of Majority

Agency Information

Present Level “DOs”:

Do use specific, clear information

Do target student needs

Do use quantifiable and descriptive information

Present Level “DON’Ts”:

Don’t use vague information, disability category labels, vague or overly technical language in describing test scores, or disability category eligibility language

Don’t use irrelevant information

Don’t use incomplete information

HOW THE STUDENT’S DISABILITY IMPACTS PARTICIPATION IN THE GENERAL CURRICULUM (V, VI)

The IEP must include:

- √ A description of **how** the student’s **disability** affects the student’s involvement in the general curriculum.
- √ This description provides the basis for determining accommodations needed for the student to participate in the general curriculum to the maximum extent appropriate.
- √ The description for preschool-age children must address appropriate activities, such as coloring, circle time, play time, story time, etc.
- √ The description must not be a re-statement of the student’s disability category.
- √ The impact statement must describe **specific skills, behaviors, and capabilities impacted** by the disability.
- √ The impact statement will describe, as appropriate, areas of academic achievement and functional performance including interaction with peers and adults and communication; generalization of skills to new settings; independent functioning; and prompting and/or the need for direct assistance.

MEASURABLE ANNUAL GOALS AND SHORT TERM OBJECTIVES (VI)

The IEP must include:

- √ Statement(s) of measurable Annual Goals
- √ Short term instructional objectives designed to move the student toward achievement of the Annual Goal **are required** for students on alternate standards. The IEP Team may choose to include short term objectives for students instructed in the general curriculum (students who are not recommended for alternate assessment).

The goals must include:

- √ Needs of the student as reflected in the present level narrative
- √ Specific goal statements that are observable and measurable and which address priority educational needs
- √ For transition-age students with identified measureable postsecondary goals, the annual goals and objectives must support the student's future attainment of those postsecondary goals
- √ When applicable, at least two Short Term Objectives designed to move the student toward mastery of the Annual Goal
- √ **Behavior** that addresses individual student need, described in **observable** terms and related to **needs** identified in present level of performance
- √ **Condition** needed for student to perform skill or behavior such as types of support or assistance and circumstances (context, format, time)
- √ **Criterion** that: sets **mastery or proficiency** level for **attainment of goal; describes progress in a way that can be measured; uses terms understandable** by all participants; relates to present level data; and describes **progress expected within one year**

Measurability check:

Is the action, behavior or skill to be measured described in **specific** terms?

Is there a clear description of what is to be measured and how to measure it?

Will a review of progress be **objective**? Will results be consistent regardless of the reviewer?

Is the goal **quantifiable**? Can numerical or descriptive information be compared to previous data?

Is the language **clear**? Is the language understandable by all involved, especially non-educators?

(Source: Bateman & Herr, 2003)

Measurable Annual Goals "DOs":

Do use specific, clear information

Do relate to domain and student needs as described in present level narrative

Do use descriptive information

Do include meaningful and logical criteria for measurement

Do relate to the postsecondary goals and do support the student's future attainment of the postsecondary goals

Measurable Annual Goals "DON'Ts":

Don't use vague information

Don't be repetitive

Don't be overly general

EVALUATION CRITERIA, PROCEDURES AND SCHEDULES (VI)

The IEP must include:

- √ Appropriate criteria, evaluation procedures, and schedules for determining whether the student is progressing adequately toward mastery of Annual Goal(s)
- √ Evaluation Plan determinations that are relevant and applicable to measure progress for specific goals as written
- √ Titles of professionals responsible for planning/implementing services and documenting progress toward mastery of the goals and objectives

Parents must be:

- √ Regularly informed of their child's progress toward mastery of Annual Goals
- √ Informed at least as often as parents are informed of the progress of non-disabled students (quarterly report or more frequent)

SUPPORTS (VII, VIII, IX, XII)

The IEP includes statements to describe needs in the areas of:

- √ Accommodations for Instructional Delivery/Program Modifications *[per state statute, written parental consent (see form SB 89043) must be obtained prior to implementing instructional accommodations that are not allowable on FCAT]*
- √ Behavioral Supports
- √ Support for School Personnel
- √ State/Districtwide Assessment Programs (including any needed accommodations for testing) *[Per state statute, written parental consent (see form SB34517) must be obtained when the IEP Team determines the provision of access points curriculum and alternate assessment for a student. See page 32 in this manual for more information.]*
- √ Alternate Assessments

SPECIAL EDUCATION AND RELATED SERVICES (X, XI)

The IEP must include:

- √ Statement of specific Special Education (specially designed instruction/services) and Related Services to be provided by ESE service providers
- √ Supplementary Aids and Services
- √ Extended School Year (ESY) needs/services

INITIATION AND DURATION OF SERVICES: DATES, FREQUENCY AND LOCATION

The IEP must include:

- √ Projected dates for initiation and duration of all IEP services and supports and, when applicable, for Extended School Year services
- √ Type/description of services
- √ Frequency of services
- √ Location of services

SPECIAL CONSIDERATIONS (XIII)

Special considerations are addressed per individual student's current functioning and needs.

LEAST RESTRICTIVE ENVIRONMENT REVIEW (XIV)

The LRE summary documents:

- √ Percentage of time with non-disabled students
- √ Purpose of participation with non-disabled students
- √ Supportive information to explain if the student's needs require removal from general education classroom for any portion of the school day (to include factors considered, previous educational alternatives/placements attempted, and accommodations/modifications considered or previously attempted).

SUMMARY OF DATA/DELIVERY OF SERVICES SECTION OF THE IEP

The IEP Summary section documents the following:

- √ Type of Meeting
- √ Placement Determinations *[Per state statute, written parental consent (see FLDOE form, SB34518) must be obtained when the IEP Team determines placement in an exceptional student center. See page 35 in this manual for more information.]*
- √ School Assignment
- √ Current Area(s) of Eligibility
- √ Case Manager Information
- √ Information Regarding Parental Consent for Instructional Accommodations
- √ Additional Comments/Other Pertinent Information/IEP Revision Information

SIGNATURE OF PARTICIPANTS

- √**Parent/Guardian/Surrogate**: Signature appears on IEP when in attendance. If not in attendance, Case Manager writes comment on parent signature line, such as “see MO-12 dated _____” to reference initial notice/invitation to parents and all attempts to encourage parent participation. (When filling in the blank, use initial date of notification.)
 - √**ESE Teacher/Therapist/Provider**: Attendance and signature required.
 - √**Regular Education Teacher**: Must attend if student is or may be participating in the general education environment. Signature appears if Regular Education Teacher attends meeting. Parent may give written consent for excusal (SB89003) of the Regular Education Teacher’s attendance at the IEP Team meeting. When that occurs, Planning Notes (provided in advance of the meeting to parents and IEP Team) will be used in lieu of Regular Education Teacher’s attendance. The Case Manager writes statement on Regular Education Teacher signature line, such as “See Planning Notes and Excusal Consent Form dated _____.” NOTE: If Planning Notes are used to document Regular Education Teacher’s input at the IEP meeting (in lieu of the teacher’s attendance at the IEP meeting), then the Planning Notes are attached to the IEP and filed in the Student Resource Folder and in the ESE Documents Folder in the Cumulative Folder. Parents receive a copy of these Planning Notes as well. When Planning Notes or other written input is provided in lieu of Regular Education Teacher’s attendance, they must be provided in advance of the meeting to the parents and to the IEP Team. **Planning notes are only sent to Central Files, for students with a Matrix Level Support Level 4 or 5, when the planning notes are used in lieu of the IEP Team member’s attendance at the meeting.** Upon written agreement of the parent and IEP Team, when the Regular Education Teacher attends the IEP meeting in part, he/she may sign upon departure from the meeting if the signature page is available. If the signature page is not available at that time, the ESE Case Manager will write a statement on the regular education teacher signature line such as: “*Attended a portion of the meeting/left with agreement of parent and IEP Team prior to signing.*”
 - √**Evaluation Representative**: Attendance and signature required. If a professional fulfills the role of Evaluation Representative as well as another role at the IEP meeting, then he/she should sign twice. (However, the LEA Representative may **not** fulfill a role other than LEA Representative for a given IEP meeting, and will only sign one time.)
 - √**Agency Representative(s)**: If parental consent form to invite agency representative(s) was not returned or parental consent was denied, write, “parent consent to invite agency representative(s) was sought but not obtained”. If agency representative was invited and did not attend, write “parent gave consent and agency representative was invited but did not attend”.
 - √**Student**: Signs when in attendance. (For Transition IEPs, students must be invited and encouraged to participate. Methods used to encourage and include student participation are documented in Section III of the TIEP.)
 - √**Other Personnel**: Sign when in attendance. This may include Agency Representatives, School Psychologists, School Social Workers, Guidance Counselors, Transition Specialists, etc.
 - √**LEA Representative**: Attendance and signature required. (The LEA Representative fulfills this one and only designated role at the IEP meeting and may **not** fulfill another role at the IEP meeting. This individual will sign the IEP on the LEA Representative signature line only.)
- √ Date that signatures were obtained at the IEP Team meeting is documented.

NOTE: Parent(s) or any personnel not in attendance must not sign the IEP. When parents have agreed for the IEP Team meeting to be held without them, the prior parent notification form (MO-12) will document this. The Case Manager will reference the initial date of notification on the parent signature line (“See MO-12 dated _____”). **The IEP is finalized at the IEP meeting. No parent signature or any other signature is added at a later time.**

Directions for IEP Documentation

ALL sections of the IEP must be addressed.

Do not leave any blanks

- Complete student's personal identification information, when applicable.
- Use the student's legal name. Do not use nicknames.
- Complete the following carefully, as applicable:
 - DOB: Month/Day/Year
 - Student Number: 7-digit student number
 - Central File Number: Letter, followed by 4 numbers (when available/NOTE: Central File numbers are no longer assigned for newly identified students.)
 - IEP Date: date of the current IEP (typically the date you are holding the meeting and writing the IEP)

Section I: Methods Used to Encourage and Include Parent Participation

Prior Parent Notification form (MO-12) is to be sent to the parents 7-10 days prior to the meeting date. Other methods may also be used to encourage parent participation.

Check all items that apply. When checking "Other," write a description of the other method(s) used. Remember to send Planning Notes in advance for the IEP Team members (including the parents) to complete.

Section II: Part B Procedural Safeguards Notice

The Individuals with Disabilities Education Act (IDEA 2004), the federal law concerning the education of students with disabilities, the U.S. Department of Education regulations and corresponding State regulations require schools to provide parents of a child with a disability with a notice containing a full explanation of the procedural safeguards available under Part B of the IDEA. Parents must be provided a copy of their procedural safeguards notice at least one time per year and at the following times:

- ▶ upon initial referral for an evaluation
- ▶ upon parent's request for an initial evaluation
- ▶ when a decision is made to take a disciplinary action that constitutes a change of placement
- ▶ upon receipt of the first State complaint in a school year
- ▶ upon receipt of the first request for a due process hearing in a school year AND
- ▶ at any time upon parent request

Section III: Transition

This student is or will be 14 years or older during the duration of this IEP (or 8th grade, which ever comes first).

Methods used to encourage and include student's preferences, interests, participation, and input:

Student input may be obtained from attending the meeting, planning notes, student conferences, interest inventories, and other methods. Check all that apply.

Section IV: Present Level of Academic Achievement & Functional Performance Data

DATA SOURCES:

Check all that apply. If "Other" is checked describe what other data were used.

If this is an Annual Review of a previous IEP indicate the results of any evaluations or assessments given in the allocated section with the date/results of those evaluations. If additional space is needed, this information may be written in the present level narrative section.

The IEP Team should consider, and check as data sources, the following on a regular basis:

- ▶ Parental input
- ▶ Performance on statewide/district assessments, transition assessments AND/OR performance on alternate assessments
- ▶ ALL available assessments/evaluations
- ▶ Progress on previous goals & objectives
- ▶ Evaluation/reevaluation results
- ▶ Other information pertaining to current level of functioning
- ▶ For transition-age student, consider Transition Assessments

Transition assessments are either formal or informal. Formal assessments may include but are not limited to: FCAT, SAT, PSAT, ACT, K-TEA, and BRIGANCE. Informal assessments may include but are not limited to: interest inventories, questionnaires, surveys, interviews, and portfolios.

Section V: Present Level of Academic Achievement & Functional Performance Narrative

NARRATIVE:

This section should provide detailed, narrative information regarding the student's *current* abilities in EACH domain area that the IEP Team will be addressing throughout the IEP based on the individual student's needs.

The present level narrative assists the team in clearly identifying the student's priority educational needs for the coming year.

This section of the IEP is the key to writing appropriate goals and objectives and should establish the baseline of information.

A baseline is established by including statements of measurability whenever possible, for example, when appropriate, document academic levels, sources of information ("as measured by..."), and the frequencies of noted behaviors. IEP Team discussions should focus on the entire student in all aspects of his/her educational life, both curricular and extracurricular.

The IEP Team discusses the concerns of the parent, reviews the student's performance in the classroom, addresses the results of state/district/alternate assessments and describes intervention strategies used.

The Present Level of Academic Achievement and Functional Performance section should read as narrative paragraph(s).

Best practice suggests that all domain areas be addressed or at least brought up for discussion. It is appropriate to indicate that there are “no concerns at this time” in a particular domain area, although not required. However, it is required that strengths, as well as needs, must be documented in the present level. (The Matrix will be completed based on the domain areas documented in the IEP.)

Consideration must be given to the Transition Service Areas of Instruction, Community Experience, Daily Living Skills, Post-school Adult Living Skills, Employment/Training and Functional Vocational Assessments.

A description of the student’s abilities/needs in the area of self determination/self advocacy skills should be addressed.

If this is an Annual Review IEP meeting, a review of progress toward goals and objectives of the previous IEP must be included in the narrative. Goals and objectives that have not been met should be considered for revision, if applicable, so that they appropriately describe what is a reasonable expectation for the student to achieve during the course of the next year; and any needed additional goals should be developed based on the student’s current functioning.

If additional sheets are necessary to complete the present level, check the box to indicate such.

After writing the present level narrative, the IEP Team should be able to identify several priority educational needs for this student. The IEP Team should be mindful of the stated priority educational needs throughout the IEP process. A summary of the priority educational needs should be listed at the end of the present level narrative.

The ESE Case Manager should write up the results of the review of the student’s progress on the previous IEP, and draft a Present Level of Academic Achievement and Functional Performance narrative prior to the IEP meeting whenever possible. This will facilitate the IEP Team’s effective use of available time for meetings and will promote parental input. This draft information must be sent home with the meeting invitation (also called the *prior parent notification* form or MO-12) for the parents to review and to give the parents the opportunity to prepare revisions and/or additions to present to the IEP Team for consideration. Parents and other IEP Team members must be afforded the opportunity to add additional information to the present level narrative during the IEP Team meeting and/or to revise any draft IEP information prior to finalizing the data.

Definition of Transition Services

Transition services means a coordinated set of activities for a student with a disability that is designed to be within a results-oriented process, that is focused on improving the academic and functional achievement of the student with a disability to facilitate the student's movement from school to post-school activities.

Transition services are primarily provided by school personnel and they may be addressed through the development of measurable annual goals and short term objectives, special education services, related services, instructional accommodations/program modifications, support for school personnel, supplementary aids and services, and/or statewide/district assessment accommodations/modifications.

Transition services may be special education, when provided as specially designed instruction, and/or a related service, when required to assist a student with a disability to benefit from special education.

The goal/objectives, services and supports determined on the Transition IEP should appropriately address the student's needs to enable the student to make progress which will enhance the student's attainment of the postsecondary goals after exiting secondary school.

Transition IEPs are written for students who are or will be age 14 years or older during the duration of the IEP (or in the 8th grade, whichever comes first).

For students aged 14 years or older during the duration of the IEP, the purpose of the IEP meeting is to discuss diploma options and to consider/identify needed transition services.

For students aged 16 years or older during the duration of the IEP, postsecondary goals and transition services must be addressed, including, if appropriate, inviting agencies who may be providing or paying for transition services.

All components of the IEP should support and assist the student in making progress toward mastery of the the Annual Goals/Objectives and to assist the student in making progress toward the future attainment of his/her postsecondary goals.

TRANSITION SERVICE AREAS IN PRESENT LEVEL

Transition service areas are addressed in the present level. The service areas are also reflected in other areas of the IEP including the annual goals, as applicable for individual students and their specific needs. When service areas are addressed in the present level narrative, the statements reflect the student's current performance in the specific transition service area. At times, students may not need any services in a specific transition service area because they are performing as expected in that area when compared to same age or grade peers. However, if a need for services is indicated for a student in any of the transition service areas, there should be a goal/ objective addressing that need.

The present level narrative addresses the following transition service areas:

1. **Instruction** – formal or informal imparting of knowledge or skills. The strategies can include broad curricular areas of needed course work, educational experiences, and skill training. The strategies are necessary for a student to prepare for and take part in college, continuing education, further skill training, and adult living. **All** goals included in IEPs address this area.

Example of present level statement related to instruction:

John continues to need instructional support for remediation of math and reading skills.

2. **Community Experience** – strategies that are generally provided outside the school building and that prepare the student for participation in community life and include government, social, recreational, and leisure.

Examples of present level statements related to community experiences:

John functions independently, demonstrating age-appropriate skills during all community experiences.

While shopping and participating in Best Buddies events, Mark needs verbal prompting to participate successfully.

3. **Daily Living Skills** – strategies that adults do most every day to take care of and manage personal needs.

Examples of present level statements related to daily living skills:

Mary demonstrates age-appropriate skills and functions independently in areas of daily living skills.

Sally continues to need instruction specific to daily living skills. Her basic skills and grooming have improved; however, she needs reminders and guidance for basic self care. She needs further instruction in managing money.

4. **Post School Adult Living Skills** – strategies that help prepare a student with skills for living and participating in the community. In adulthood, these tasks could be completed occasionally.

Examples of present level statements related to post school adult living skills:

Beth participates successfully in post school adult living skills. For example, she has obtained her driver's license, and is able to schedule necessary appointments.

Burt needs assistance in the area of post school adult living skills. For instance, he needs continued practice in reading a bus schedule.

5. Employment/Training – strategies that focus on development of work-related behaviors, job seeking and retention skills, career exploration, skill training, apprenticeship training, and employment. This area can include the acquisition of basic skills.

Examples of present level statements related to employment/training:

Gavin has successfully participated in a career experience program and functions independently at his part time job as a stocker at Sports Authority. He is enrolled in a career and technical education program.

Lorna needs assistance in the area of employment/training. She needs assistance with interviewing skills and completing a job application. Lorna also needs reminders to complete her work and to follow directions when participating in the school's child care program.

6. Functional Vocational Assessment – a process that provides information about job or career interests, aptitudes, and skills. Information gathered through a functional vocational assessment can be used to refine educational experiences, courses of study, and employment strategies. This can include observations, formal or informal measures, and should be practical. Evaluations of career interests and aptitudes may include: interest inventories, situational assessments, career exploration, learning styles, work evaluations, community based training, and/or career experience evaluations.

Examples of present level statements related to functional vocational assessment:

Madison has been successfully participating in the culinary arts program and has a part time job at a local bakery. Aptitudes and interests have been identified in the area of culinary arts.

Skylar has been provided the opportunity to experience a variety of jobs while participating in a career experience program. He is undecided regarding what he would like to do after he graduates. According to his Student Evaluation Form, Skylar has shown overall improvement in all areas.

Please note that the sentences provided above as examples of present level narrative statements do **not** include “**will be addressed at a later date.**” “**Will be addressed at a later date**” should not be written as a present level narrative statement, as the IEP Team should be addressing these skills when a current need exists. When a current need exists in any given transition service area, then the IEP Team must address it at the current time.

The student's abilities and/or needs in the area of **self determination/self advocacy skills** must also be addressed in the present level narrative statement, as well.

Transition service areas are addressed throughout the entire IEP.

The following are examples of strategies that may be used in developing goals/objectives that address needs in the transition service areas:

1. **Instruction:** These strategies will assist in preparing a student for postsecondary endeavors. Strategies may include: career exploration, therapies, behavior interventions, self determination/self advocacy skills and **all** academics. All goals included in the IEPs address this area.
2. **Community Experience:** These strategies are needed for successful community experiences, such as reading menus, making change, banking skills, communication skills, and career preparation skills. Opportunities for the transference of skills can occur during field trips, CBI, CBT, Special Olympics, and Best Buddy events.
3. **Daily Living Skills:** These strategies may include preparing meals, nutrition, preparing a budget, maintaining a home, housekeeping, caring for clothing, personal grooming/hygiene, safety, scheduling appointments, managing a daily schedule, managing money, and developing a personal fitness routine.
4. **Post School Adult Living Skills:** These strategies will assist in preparing a student for post school adult living skills. Strategies may include completing sample applications for lease agreements, insurance forms, tax returns, bank accounts, utilities, reading a bus schedule, and self determination/self advocacy skills.
5. **Employment/Training:** These strategies will assist in preparing a student for employment. Strategies may include participating in a career exploration program, completing job applications/resumes, practicing interviewing skills, participating in a school-based business, reading a bus schedule, reading work schedules, job shadowing, and developing good work habits (following directions, self advocating, and constructive criticism).
6. **Functional Vocational Assessment:** These strategies may include developing a vocational portfolio (including vocational interests and abilities), contacting agencies that provide functional vocational assessments in the community, and completing CHOICES and/or other vocational interest inventories that are available online.

Course of Study/Diploma Option

A course of study is an educational plan which determines the selection and number of required courses for graduation; i.e. advanced college preparatory, career preparatory, college/career preparatory, college preparatory, international baccalaureate, and standard/traditional. For students who are 14 years or older during the duration of the IEP or in the 8th grade, whichever occurs first, the IEP Team must select a course of study and a diploma option. Indicate the diploma option date. Please note that if a student changes his/her course of study, the requirements for graduation may change.

Measurable Postsecondary Goals

Measurable postsecondary goals must be completed for a student who will be 16 years or older during the duration of the IEP and must address education/training, **and** employment; and as needed, independent living skills and must be able to be counted or observed. These specific and realistic goals must be related to the student's course of study. These goals are targeted for attainment **after** exiting high school. The measurable postsecondary goals must be related to the student's course of study and must be based on age-appropriate transition assessments. The following are examples of measurable postsecondary goals:

Education/Training:

Within one year after graduating from high school, Michael will enroll in courses leading to an associate's degree at a community college.

Employment:

Within 6 months after receiving his associate's degree, Michael will obtain employment working with animals.

Education/Training:

Within one year after graduating from high school, Tom will enroll in courses at an adult technical school for certification in marine mechanics.

Employment:

Within 6 months after graduating from an adult technical school and receiving his certificate, Tom will obtain employment working on boats.

Education/Training:

Within one year after graduating from high school, Dana will participate in a travel training program provided by public transportation.

Employment:

Within one year after graduating from high school, Dana will obtain employment in a community retail environment.

Independent Living Skills:

Within one year after graduating from high school, Dana will get ready for work by bathing, brushing her teeth, dressing and making her lunch.

Education/Training:

Within one year after graduating from high school, Liz will participate in supported employment training at a job in the community to improve her work skills.

Employment:

Within one year after graduating from high school, Liz will obtain employment in a restaurant.

Independent Living Skills:

Within one year after graduating from high school, Liz will display self advocacy skills by initiating conversations.

Age of Majority

In the State of Florida, age 18 is considered the age of majority and at such time all rights are transferred to the student. Parents continue to receive notice after the rights are transferred. Student and parent(s)/guardian(s) are notified of transfer of rights at least one year prior to the student's 18th birthday.

"At least one year prior to the student's 18th birthday, the student has been informed of the rights that will transfer from the parent to the student on reaching the age of majority." This box is checked at the time that the transfer of rights is explained initially to the student and parent and at every subsequent IEP meeting after that has occurred. Indicate the **initial** notification date.

The District provides a separate and distinct notice of the transfer of rights to the student and parent within one year of the student's 18th birthday.

Agency Information

For students who will be 16 years or older during the duration of the IEP, agencies who may be providing or paying for transition services must be invited to the IEP meeting. Check one of the corresponding boxes.

If the parental consent form to invite agency representative(s) (SB89003) was not returned or parental consent was denied, write "parental consent to invite agency representative(s) was sought but not obtained" on the agency representative signature line. If an agency representative was invited and did not attend, write "parent gave consent and agency representative was invited, but did not attend" on the agency representative signature line. Parental consent to invite an agency representative must be obtained relative to *each* IEP meeting for which an agency representative may be invited to attend.

On the IEP template, there are options for selection regarding agency representatives; the ESE Case Manager will check the applicable button relevant to the current IEP meeting.

Section VI: Measurable Annual Goal and Short Term Objectives

Indicate with a check the **domain(s)** addressed by each goal.

Complete the impact statement to describe how the student's disability affects his/her involvement and progress in the general education curriculum (or activities, for preschool students). This statement addresses the difficulties, challenges and unique needs that a student has as a result of his/her disability.

The impact statement should:

- indicate **specifically** how the student's disability hinders or affects the student in accessing the general education curriculum or environment
- directly reflect information that was generated in the Present Level of Academic Achievement and Functional Performance narrative
- reflect one of the priority educational needs
- identify challenges, barriers, level of independence, support and assistance needed
- identify needs which describe skills or behaviors critical for the student to learn

The impact statement should NOT:

- label a student nor indicate specific ESE program eligibility categories
- prescribe a treatment for the disability

The corresponding annual goal will address the student's need indicated in the impact statement.

Examples of Impact Statements:

Steven's difficulty keeping track of and turning in assignments

Denise's difficulty generalizing his/her skills to new situations in daily living, at work and in the community

Johnny's inability to hear and manipulate sounds in spoken words

Sarah's inability to understand the awareness of the relationship between sounds and letters

Ben's inability to read with a high degree of accuracy

Jessica's difficulty communicating effectively with peers and in communicating her desires and needs

Anisha sometimes misses instructions from others and will not ask for clarification from teachers or peers when she does not understand what to do

Carlos' difficulty comprehending geometric and algebraic concepts when presented verbally or as formulas

Johnny's difficulty focusing his attention as directed by the teacher

Cindy's difficulty articulating sounds and words

Janna's difficulty understanding abstract mathematical concepts

Tiffany's need for textbooks and materials required for her classes put into Braille

As a result of her disability, Tiffany tends to withdraw from her sighted peers

Edner's difficulty staying on task and paying attention

Edner's difficulty keeping track of and completing assignments in a specified time frame

Tim's difficulty editing written work by detecting and correcting grammatical errors

Jason's difficulty learning all the necessary content material independently

Sue has difficulty establishing and maintaining interpersonal relationships

The Annual Goal

The annual goal MUST be MEASURABLE and include the following components:

Observable Behavior - what the student will do. Be sure to use verbs and phrases that describe actions to be observed.

Criteria for Mastery - How well, how often, how much of an increase over baseline, to what degree, etc., and over what period of time (how long) that level will be sustained in order for it to be considered mastered.

Condition (or circumstances that would allow the student to show what he/she knows) under which the goal is to be accomplished. This means the type of prompt that will initiate the expected behavior or the type of materials (no name brands), type of strategies or activities, type of accommodation, etc. A condition could also describe a location or a tool (such as visual support, calendar, story starter) that will be provided. The location should be descriptive of the type of educational setting that will prompt the goal behavior. This should not be confused with the ESE placement determination nor should an ESE placement be described in the goal statement. (For example, “small group setting” would be an appropriate term to use as a condition, but “resource room setting” would not. The goal is written **prior** to the IEP Team making an ESE placement decision.)

For transition-age students, the annual goals enable the student to meet his/her postsecondary goals.

Criteria for Mastery – describes how a student’s performance will be evaluated.

Examples:

- If a student is expected to learn her phone number, ask yourself: “How well is she expected to learn it?” Is it sufficient to learn only 85% of a phone number? Or is it sufficient to remember a phone number 85% of the time? In this case, it is sensible to expect that a student would need to learn 100% of her phone number and be able to repeat it 100% of the time in order for her to benefit from learning this skill.
- Once the phone number can be repeated accurately, in the correct order, by the student is it sufficient that she be able to repeat it correctly only one time? Knowing the information on one occasion does not usually indicate that the skill has been “mastered.”
- The student being able to repeat her phone number once a week for 4 weeks or every day for 2 weeks or 2 times a day for 3 weeks would be a better indicator of mastery.
- Any option that the team chooses is correct, the important concept is to build in two elements to the measurability/mastery section of the goal: “how well” and “over what period of time.”

The final goal could be:

Suzy will state her phone number (*behavior*) with 100% accuracy (*Criteria, how well*) 3 times a week for 4 weeks (*Criteria, over what period of time*) when requested (*Condition/Prompt*).

Behavior = Suzy will state her phone number

Criteria for Mastery = with 100% accuracy (how well), 3 times a week for 4 weeks (over what period of time)

Condition/prompt = when requested.

Annual Goal Examples: Behavior (indicated in BOLD), *Condition* (indicated in italics), Measurability (indicated by underline)

Tiffany **will read** 50 words per minute *using Braille and specially designed materials* during 9 of 10 opportunities.

Steve will learn to use an organizer *independently* to keep track of assignments so as to turn in 6 class assignments per day and 4 homework assignments per week complete and on time for 3 consecutive weeks.

Given a story starter, Jessica will write a five-sentence paragraph with clear structure including a topic sentence and supporting details for four consecutive writing assignments.

Short Term Objectives and Benchmarks have the same purpose. The purpose is to allow the IEP Teams to gauge student progress and communicate the team's expectations for the student. Short term objectives **are required** for students on alternate standards. For students instructed in the general curriculum (students who are not recommended for alternate assessment), the IEP Team may choose to include short term objectives.

Short term objectives are substeps or intermediate steps of an annual goal. Short term objectives are **instructional** substeps that will move the student toward the annual goal.

Benchmarks also move the student toward his/her goal but include information about the behavior and the performance level expected at targeted dates or segments within the year (timelines).

When writing short term objectives, think of the annual goal as "what" the student will master and short term objectives as "how" instruction will be organized to facilitate the student's mastery of the goal.

Short Term Objectives and Benchmarks are based on the specific student's needs identified in the present level of educational performance narrative.

Short Term Objectives should:

- specify a measurable knowledge, skill, behavior or ability to be mastered
- be logically ordered, incremental steps or milestones that the student must achieve in order to ultimately achieve the annual goal
- be organized sequentially; each building on the previous one leading naturally to the annual goal.
- be as specific and measurable as possible
- be developmentally sequenced or otherwise related substeps of that annual goal.
- follow the same format as described for goals.

Benchmarks should:

- specify a measurable knowledge, skill, behavior or ability to be mastered
- be logically ordered, incremental steps or milestones that the student must achieve in order to ultimately achieve the annual goal
- be organized sequentially; each building on the previous one leading naturally to the annual goal.
- be as specific and measurable as possible
- be developmentally sequenced or otherwise related substeps of that annual goal.
- include an observable behavior, condition if applicable, and criteria (student's acceptable level of performance and timeline or specified segments of the year to report progress)

Ways to Organize or Sequence Goals and Short Term Objectives and/or Benchmarks

Depending on the purpose of the goal it is helpful (but it is not required) for teams to organize short term objectives and/or benchmarks. Below are several organizational structures. Using these organizational structures for goals and objectives/benchmarks will assist teams in collecting the appropriate data and selecting the appropriate data collection instrument to measure progress toward achievement of goals.

Criteria for mastery or skill level in objectives/benchmarks are required components of IEP content. “IEP benchmarks” are not the same as the “Sunshine State Standards benchmarks.” If the criteria for the Short Term Objectives are the same as the criteria stated in the Annual Goal, then there is no need to repeat the criteria in the Short Term Objectives. Benchmarks, however, must include the timeframe for progress checks at specified segments of the year.

Types of Criteria:

Rate Based – If the desired outcome is to increase or decrease the speed at which the student is to perform a task

Task Analysis – If instruction or a task is broken down into substeps to be learned

Duration Based – If the desired outcome is an increase or decrease in the amount of time over which an activity is sustained

Frequency Based – If the desired outcome is an increase or decrease in the number of times a response is given

Transfer of Generalization – If the desired outcome is for a student to demonstrate a mastered skill in a variety of educational settings or circumstances

Percent Accuracy – The number of correct responses compared to the total number of responses, when the accuracy of student performance is to be measured

Latency Based – If the desired outcome is a decrease in the time between giving the student a cue, prompt of direction and the time it takes for the student to begin responding

Levels of Assistance/Prompting – If the desired outcome is a withdrawal of or decrease in the amount of help a student needs to complete a task

Grade or Age Level – If the desired outcome is the attainment of an assigned numerical value related to student performance that references a source (e.g., statewide and/or districtwide assessment)

Descriptive Statement – Description of the expected results using clear, objective language

Timeframe (Benchmarks) – Provides the expected date by which the intended task will be completed or accomplished

Data Sources – The IEP must include appropriate evaluation procedures and schedules for determining whether the student is progressing adequately toward mastery of annual goals. Evaluation plans must be relevant and applicable to measure progress for specific goals written. For example: when evaluating “Task Analysis” type goals, then rubrics might be appropriate. When evaluating academic achievement, then percentages and grades are appropriate. When evaluating goals that address behavior needs, then percentage of time is NOT typically a useful method of measurement; it would be more relevant and practical to address the number of incidents of appropriate or inappropriate behavior rather than the percentage of time. Sample formats for collecting data are available by contacting an Area Office ESE Team member or one of the district IEP trainers.

Goal and Short Term Objectives Examples:

1. Rate Based

These objectives are based on increasing the speed with which a skill is demonstrated.

Goal - James will complete his math classroom assignments on time (within one class period) 4 days per week for 6 consecutive weeks while maintaining an 85% average.

Objectives

- a. With shortened assignments, James will complete math assignments within one class period 3 days per week.
- b. With shortened assignments, James will complete his math assignments on time 4 days per week.
- c. With full length assignments, James will complete math assignments on time 3 days per week.

Suggested Data Collection Instrument(s) – Timer, Data Sheet, Grade Book, Work Samples

2. Task Analysis

This type of objective breaks down larger tasks into smaller learning steps; these are usually sequenced toward the annual goal. They may also be small related sub-steps of the larger annual goal.

Goal - Tracy will complete all seven steps necessary for brushing her teeth, without physical assistance and within an average of 10 minutes per day for 4 days in a row.

Objectives

- a. Tracy will wet her toothbrush and put a pea-sized amount of toothpaste on the brush within specified time limit.
- b. Within the specified time, Tracy will brush her teeth, rinse her mouth with no physical assistance.
- c. When finished brushing, Tracy will rinse the toothbrush, cap the paste and return the items to their storage area, with no more than 2 verbal prompts when necessary.

Suggested Data Collection Instrument(s) – Rubrics, Task Analysis Data Sheet

3. Duration Based

These objectives are focused on increasing the amount (length) of time a skill is sustained.

Goal - Darren will demonstrate head control and will operate a head switch for at least 30 seconds, for 3 days in a row.

Objectives

- a. Darren will sit upright for 10 seconds without any neck or back support, 3 days in a row.
- b. Darren will sit upright for 15 seconds without any neck or back support and operate a head switch or stimulatory device, 2 days in a row.
- c. Darren will lift and maintain head in proper alignment to operate a head switch for 20 seconds, 3 days in a row.

Suggested Data Collection Instrument(s) – Duration Recording Sheet, Clock, Watch or Stopwatch

4. Frequency Based

This type of objective measures the number of times a behavior occurs. Goals may be to increase or decrease the occurrence of a particular behavior

Goal – Using anger management strategies and relaxation techniques, Beth will reduce the number of tantrums (head banging, slapping and biting) to no more than one episode per nine week grading period.

Objectives

- a. Beth will reduce tantrums to 2x per month
- b. Beth will reduce tantrums to 1x per month
- c. Beth will reduce tantrums to 0x per month

Suggested Data Collection Instrument(s) – Time Sampling Data sheet, Scatter Plot, Behavior Log, Anecdotal Records

5. Transfer of Generalization of Learning

These objectives move the mastery of skills from smaller settings to more general or inclusive settings or from demonstrating a skill with a lot of adult support to demonstrating the same skill with less and less adult support.

Goal - Given monthly small group training in self monitoring skills and no more than two verbal prompts, Billy will generalize and follow class rules during electives and transitions, as evidenced by no more than two referrals per 9-week period.

Objectives

- a. Billy will use a checklist to accurately monitor and evaluate his behavior in small group setting.
- b. Billy will independently self monitor his behavior in a large group setting
- c. In transition settings and electives, using daily checklists and weekly home report, Billy will self monitor his behavior

Suggested Data Collection Instrument(s) – Rubric, Skill Training Sheet, Anecdotal record, Time Samples, Task Checklist, Pattern Analysis

6. Percent Accuracy

This type of objective is mastered by demonstrating a certain level of proficiency.

Goal - Within a small structured group setting using picture prompts, Neco will tell a story in sequence with 100% accuracy 4 out of 5 trials.

Objectives

- a. In 3 out of 3 trials, Neco will tell what happened first and last with 100% accuracy.
- b. Given 5 consecutive opportunities, Neco will organize story pictures in the correct sequence with 100% accuracy.
- c. Using picture prompts, Neco will retell a familiar story in the correct sequence with 100% accuracy, 3 of 5 opportunities.

Suggested Data Collection Instrument(s) – Rubric of story details, checklists, Tape recording, work samples

7. Latency Based

This type of objective measures how much time elapses between the presentation of a cue, and the occurrence of the behavior.

Goal – Given verbal instructions, Sam will begin assigned task within one minute with no more than one prompt.

Objectives

- a. Sam will begin instruction within 2 minutes with no more than 3 prompts.
- b. Sam will begin instruction within 1.5 minutes with no more than 2 prompts.
- c. Sam will begin instruction within 1 minute with no more than 2 prompts.

Suggested Data Collection Instrument(s) – Time Samples Skill Training Data Sheet, Timer, Stopwatch, Event Recording Data Sheet

8. Levels of Assistance

This type of objective measures the number and type(s) or levels of assistance (prompts) that the instructor provides a student (i.e., measures independence).

Goal – Given verbal instructions, Joe will begin an assigned task within one minute with no prompts.

Objectives

- a. Joe will begin task within 1 minute when given 2 verbal prompts (30 seconds apart).
- b. Joe will begin task within 1 minute with 1 verbal prompt.
- c. Joe will begin task within 1 minute with an adult in physical proximity of 2 feet.

Suggested Data Collection Instrument(s)- Event Recording Sheet, Time Sample Sheet, Timer, Stopwatch, Behavior Log

Important Note: In examples 7 and 8 it is important to realize how the two similar goals are DIFFERENT. In Goal 7 the object is to reduce the amount of time it takes for the student to begin a task so the time between the instructions and beginning the task is measured. In goal 8 the object is to reduce the amount of assistance required to get the student to start the task in a timely manner so the number of prompts are the focus of the data collection.

Benchmarks may be added to objectives to indicate the expected time frame by which the intended task will be completed or accomplished.

Benchmark examples:

By the end of October, Danny will place toothpaste on the brush accurately 100% of the time, 5 times in a row.

By the end of January, he will brush his teeth without hand over hand assistance 4 out of 5 days a week.

By the end of the school year, Danny will put away all tooth brushing tools and clean the sink area with one prompt 3 days in a row.

NOTE: When goals and objectives are logically ordered and sequenced, selection of appropriate data collection instruments, methods and procedures used to evaluate student progress becomes a simple process.

Section VII: Accommodations for Instructional Delivery/Program Modifications

VII. Accommodations are changes that are made in **how the student accesses information and demonstrates performance**. Program modifications are described in the 1999 federal regulations by way of illustration. Some examples given are providing a special seating arrangement for a student; raising the level of a student's desk; and allowing more time for assignments.

- Check "None Required" or "Required," as applicable.
- If required, then check accommodations the student needs in order to progress in the general curriculum. (Note: It is rare that a student would require special education services and not need some accommodations.)
- Indicate all locations in which the accommodations are to be provided.
- Indicate the frequency(ies) with which the accommodation(s) is (are) to be used.
- When accommodations marked with an asterisk are recommended for students who participate in state/districtwide assessments, then "Informed Parental Consent for Instructional Accommodations" (form SB89043) must be obtained prior to implementing those accommodations. The status of the parental consent for this section is then documented in the "Summary of Data" section as well.

Section VIII: Behavioral Supports

Check "None required" or "Needed." If needed, check applicable statements.

If the student's behavior impedes his or her learning or that of others, the IEP Team must consider strategies, including positive behavioral interventions and supports to address the behavior. Behavior should be addressed in goals and objectives. (**NOTE:** *Whenever a student has been removed from school for more than 10 school days in any one school year, due to behaviors, the IEP Team must consider the need for an FBA, or a revision to the current FBA/PBIP when an FBA/PBIP is already in existence.*)

To effectively develop a plan that addresses behavioral issues, the team must determine the purpose of the behavior. In other words, what is the student gaining from the behavior? Students may be gaining, such things as, adult or peer attention, avoidance of doing undesirable school assignments, communication, or a myriad of other outcomes.

Conducting a Functional Behavioral Assessment (FBA) will provide the IEP Team with the information needed to create a personal plan to address an individual student's needs. This plan is called a Positive Behavior Intervention Plan (PBIP).

It is not required to have a Functional Behavioral Assessment or Positive Behavior Intervention Plan prior to writing goals and objectives that address behaviors; however the team should seriously consider conducting a Functional Behavioral Assessment to assist in planning more effectively for students whose

behaviors impede their learning or the learning of others. (**NOTE:** *FBA/PBIP is required in order to check specific levels in the Social/Emotional domain on the Matrix of Services form.*)

Section IX: Support for School Personnel

“None required”: If this box is checked, move on to the next section.

If “Required”:

Indicate any direct services that are needed for school personnel in order to assist them in providing appropriate instruction, utilizing instructional strategies, and/or implementing accommodations/modifications for a student so as to ensure that the IEP is appropriately implemented.

Support may include specific training or staff development activities to ensure that school personnel have the knowledge, information, skills and materials necessary for the student to progress adequately. Support may also include consultative services, collaboration with special education personnel, or additional adult assistance.

Support in the form of special equipment or materials may also be needed by school personnel to assist them in providing instruction, accommodations, and/or modifications to the student.

The determination of Supports for School Personnel is one of several areas in the development of IEPs in which the Regular Education Teacher’s input will be especially pertinent to the IEP Team.

Section X: Special Education Services

This section of the IEP documents what special education services (specially designed instruction) are to be provided by ESE service providers in order for the student to progress toward mastery of Annual Goals. *This section of the IEP is NOT meant to reflect the student’s course schedule.*

Check applicable description(s) of ESE services; include location (type of classroom, such as ESE Classroom or Regular Education Classroom; or other educational setting) and frequency (such as daily, weekly, etc.) or amount of time (number of minutes). Number of minutes must be used to indicate the frequency of therapies.

Special education services are defined as specially designed instruction or ESE services provided to the student, or on behalf of the student **by an ESE service provider** to:

- Advance appropriately toward attaining the Annual Goals
- Be involved and progress in the general curriculum and extracurricular activities
- Be educated and participate with other students with disabilities and non-disabled students

Special Education Services:

Special education is defined as specially designed instruction, at no cost to the parents, to meet the unique needs of a student with a disability. Specially designed instruction means adapting the content, methodology, or delivery of instruction, as appropriate, to address the unique needs that result from the student’s disability and ensuring access of the student to the general curriculum to meet the educational standards that apply to all students.

Program areas, subject areas, or service delivery models (e.g., Specific Learning Disabilities, “FUSE,” Reading, or Co-taught Classes) are not considered to be special education services. Examples of how to

identify special education services on the IEP are: reading skills and strategies; written language skills and strategies; mathematics skills and strategies; speech therapy, etc.

To reiterate, FUSE, co-teach and support facilitation should not be used to describe specially designed instruction/ESE services. These terms describe service delivery models. FUSE is an acronym that stands for *Florida Uniting Students in Education*. In our district this acronym is used to describe co-teach and support facilitation models. In a co-teach service delivery model, there are two or more teachers, an ESE and general education teacher, assigned to a group of students and each teacher is responsible for **all of the students** during the **entire class period/subject**. In co-teaching, each teacher is responsible for collaborative planning, delivering and evaluating instruction for all students in the class period/subject. In a support facilitation service delivery model, an ESE teacher provides support for ESE students in the general education classroom. The ESE teacher works with the general education teachers and students indentified with exceptionalities, as needed. The frequency and intensity of support varies based upon the students' needs and/or the general educators' need for assistance.

When a student is recommended for consultation only, that student is to receive ESE services in the form of the ESE Case Manager or other designated ESE personnel "monitoring skills maintenance and progress" of the student in progressing toward mastery of the Annual Goals .

IDEA 2004 requirements clearly state that, to the maximum extent appropriate, students with disabilities must be educated with students who do not have disabilities. The law also clearly states that special classes, separate schools or other removal of students with disabilities from the regular education environment may occur only if the nature and severity of the student's disability is such that regular education classes with the use of supplementary aids and services cannot be achieved satisfactorily.

IEP Team Procedure to determine what special education services are to be provided:

Step 1: Review Present Level of Academic Achievement and Functional Performance narrative.

Step 2: Discuss measurable postsecondary goals and diploma options (when applicable).

Step 3: Review measurable goals and objectives/benchmarks including plans for evaluating student progress that address the highest priority educational needs of the student.

Step 4: Review accommodations/program modifications and supports for personnel that relate to the student's involvement in the general curriculum.

Step 5: Indicate the special education services (specially designed instruction skills/strategies/services) needed to be delivered by an ESE service provider to enable the student to progress towards mastery of Annual Goals. *These are specific services provided by ESE personnel and do not reflect the student's schedule nor do they reflect services provided by Regular Education Teacher.*

Step 6: Considering the accommodations and supports needed to progress toward achievement of the goals, indicate the location in which the specially designed instruction/ESE service will be delivered. Location examples: **Regular Education Classroom, ESE Classroom, in the community.**

(NOTE: The location for co-teaching and support facilitation models is Regular Education Classroom. Co-Teaching and support facilitation are service delivery models, not locations.)

Step 7: Indicate the frequency recommended for delivering the special education services.

Examples for frequency: daily, 2 times a week, once a month, etc.

Amount of time should be used for therapy services. Examples for amount of time: 30 minutes per day, 90 minutes per week, three times a week for 20 minutes, etc. "As needed" may not be used as a frequency.

(NOTE: A range of time may only be used if the range is needed due to the unique needs of the student. An explanation must be provided to explain the reason that it was determined that a range of time is needed for a student.)

The IEP Team should give as much information as necessary to assure that the services described are clearly understood by all members of the team and all service providers.

Initiation/Duration Dates:

Fill in the initiation and anticipated duration dates in the spaces provided with the month, day and year.

Services, accommodations and/or modifications anticipated to begin or end differently than the rest of the IEP may be indicated in the additional spaces provided. The description of these services must begin with the words “Specially designed instruction in” or “Specially designed service in”; then complete the statement by referencing the area or service previously indicated. It is not necessary to include the frequency or location UNLESS it will be different than previously indicated.

Extended School Year (ESY) Services:

Check one of the boxes, as applicable.

The determination of whether a child with a disability needs ESY services must be made on an individual basis in accordance with the IEP process. Based upon data and documentation, the IEP Team must consider the following:

- The skills reflected on the current IEP
- Whether there will be significant or substantial regression of critical life skills
- Whether the regression in skills learned by the student during the current school year could be recouped during the normal period of review and re-teaching at the beginning of the next school year

Some of the factors to be considered by the IEP Team include the degree to which a student may experience an excessive degree of regression during the time period when school is not in session, and the degree to which it would take an unreasonable or unacceptable amount of time for the student to recoup skills.

The online Facts Facts #4, “Extended School Year (ESY) Services” contains helpful information on the topic of ESY services. It may be accessed in the ESE Conference Area in FirstClass IDEAS under the “ESE Fast Facts and Quick Help!” link.

The second box indicates that the IEP Team has determined that the student requires Extended School Year (ESY) services. The services needed, the location, frequency, and dates must be listed. Additionally, any Related Services determined to be provided during ESY should be documented. Around February, ESY Help Packets are provided to ESE Teachers by the ESE Department to serve as a guide in documenting any needed ESY services. The *ESY Help Packet* is also posted online in the ESE Conference Area in First Class IDEAS.

Remember that in order to make any changes to an IEP, an IEP Team meeting must be re-convened.

Changes to services include changes to the amount, frequency, location and/or dates of services.

If the IEP Team agrees that ESY services *may be* recommended for the student at a later time, but are not yet certain at the current time, then the first option should be checked in the ESY section, and a statement should be written in the “Additional Comments” section of the IEP, such as, “The IEP Team will reconvene prior to the end of the school year to address the need for ESY services, when more data is available.”

Section XI: Related Services and Supplementary Aids and Services

“None required”: If this box is checked move on to the next section.

If “Required”: Check applicable statements and provide required additional data.

Related Services are provided to enable the student to benefit from special education services.

Supplementary Aids and Services are primarily provided in regular education classes, but may be provided in other educational settings as well. These aids and services enable students with disabilities to be educated with non-disabled students and to advance and participate as appropriate in the general education curriculum.

The same aid or service might be appropriate in various settings. Indicate where the service or aid is to be provided under “location.” More than one location may be indicated.

Bus Transportation: This is transportation provided to the student to allow him/her to access special education services. The student does not require any of the supports indicated under Specialized ESE Transportation. This may include Regular Bus Transportation or ESE Bus Transportation. This would be appropriate for a student who is capable of riding a Regular Bus and/or a student who needs an ESE Bus to another location because a Regular Bus is not available. The student needs Bus Transportation, but does not require Specialized ESE Transportation. Bus Transportation is checked for Regular Bus or ESE Bus. Location example: to and from school. Frequency example: daily. *The J-screen code is 0. The student does not require Specialized ESE Transportation services; the student does require Bus Transportation due to his/her disability regardless of distance to and from school. Student may ride bus with nondisabled peers.*

Specialized ESE Transportation: This is ESE Transportation provided to a student needing additional supports as indicated based on the impact of the student’s disability. Check the box indicating the type of support required. Specialized ESE Transportation could be needed because, per doctor’s orders, the student requires an air-conditioned bus. Location example: to and from school. Frequency example: daily.

(NOTE: If ESE Bus Transportation or Specialized ESE Transportation is needed, a Transportation Alert to inquire for school choices must be submitted to the Related Services Transportation Office in the form of an electronic MO-19.)

Codes:

1. Medical equipment is required. (Medical equipment is defined as a wheelchair, crutches, walker, cane, tracheotomy equipment, positioning or unique seating devices.) *The J-screen code is 1.*
2. Medical conditions require a special transportation environment as per medical condition/physician’s prescription, e.g., tinted windows, dust controlled atmosphere, temperature controlled environment, etc. *The J-screen code is 2. Physician's prescription is to be maintained in student's permanent record.*
3. Aide or monitor required due to disability and specific needs of the student. *The J-screen code is 3.*
4. Shortened day required due to disability and specific needs of the student. *The J-screen code is 4. The documentation in the IEP must describe the need for the shortened day and what monitoring is needed or what transition plans are in place for the student's return to a full day schedule.*

Specialized Health Services: This is monitoring, assisting and performing health procedures as described in the Matrix of Services Manual will be indicated in this section. Location examples: in the school office, in the nurse’s office, etc. Frequency examples: daily, once a week.

Specialized Administration of Medication: This is administration that is more than what is routinely provided to non-disabled students. See the Matrix of Services Manual for specific information and required documentation. List where and how often this activity will take place. More than one location may be

indicated. Location example: in the classroom, in the office. Frequency example: daily, two times per week.

Counseling Services: District personnel such as social worker, psychologist, guidance counselor or contracted mental health personnel may provide this service. A need should be documented for this related service in the present level, goals and/or objectives section of the student's IEP to support the IEP Team's determination of the provision of counseling. The purpose of the counseling service should be included in the description, i.e.: "to address anger management issues." Location examples: guidance suite, administrative offices, classroom. Frequency examples: one session per week for the time period of m/d/y (month, day, year) to m/d/y (month, day, year).

Assistive Technology Services/Devices: A need for assistive technology is determined by information documented in the goals and/or objectives. Devices considered should begin with low tech, readily available devices (see Assistive Technology Resource Guide). Brand names should not be used. Example of appropriate phrasing to describe the need for assistive technology is "With the use of a writing device, Johnny will be able to..." This gives the ESE service providers the flexibility to try different products that might meet the student's needs rather than requiring an IEP revision to do so.

Procedures for Assistive Technology Services/Devices:

- If the student is currently using a device with success, the type of assistive technology device should be listed in this section if the IEP Team recommends its use to continue.
- If the IEP Team is considering a different type of device that the student has not had the opportunity to use, a consultation with the ACAT (Alternative Communication/Assistive Technology) Team should be indicated in this section. Document on a Conference Summary sheet (MO-31) the type of equipment under consideration and indicate what the IEP Team would like this equipment to accomplish. (Reference the goal and/or objectives in the IEP that documents the need). This procedure is recommended so that the IEP Team allows the student the flexibility to try out several types of devices over the course of the IEP in order to find the device that best suits the student's needs without having to revise the IEP unnecessarily.
- A consultation with the ACAT Team may be conducted by phone. The ACAT Team is also available to discuss assistive technology devices/services at any time during the school year. The Case Manager is responsible for making contact with the ACAT Team. (The ACAT office is located at the Manhattan Center. The phone number is (813) 837-7832. Their First Class email address is: ACAT. For other email users, the address is: ACAT@sdhc.k12.fl.us.)
- Should a formal ACAT Team evaluation be necessary, follow the procedures to request a Three Year Reevaluation or More Frequent Reevaluation. See the *Understanding Compliance Issues* manual for specific directions discussing the need for a reevaluation during an IEP Team meeting.

Occupational Therapy: Therapy services that are provided to an exceptional education student whose physical, motor or neurological deficits result in significant dysfunction in daily living skills or academic learning skills to a degree not otherwise provided for in the exceptional student education instructional environment. Refer to the "Reevaluation" chapter in the *Understanding Compliance Issues* online manual for a description of reevaluation procedures when considering the need for Occupational Therapy.

Physical Therapy: Therapy services that are provided to an exceptional education student whose muscular or neuromuscular conditions, skeletal deformities, trauma and physical debilitating conditions limit the student's ability to attain functional performance within the educational setting. Refer to the "Reevaluation" chapter in the *Understanding Compliance Issues* online manual for a description of reevaluation procedures when considering the need for Physical Therapy.

Services from School Psychologist: The School Psychologist must be involved in the IEP Team decision-making process to determine the need for this related service. Related services in the form of *Services from the School Psychologist* may include collaboration in the development of a behavior plan, assistance with monitoring the effectiveness of the student's FBA/PBIP, mentoring a student, educationally relevant counseling, student data collection and/or data analysis, etc.

Services from School Social Worker: The School Social Worker must be involved in the IEP Team decision-making process to determine the need for this related service. Related services in the form of *Services from the School Social Worker* may include family involvement activities, advocacy services, consultation with outside agencies/service providers, mentoring a student, educationally relevant counseling, provision of information to parents regarding availability of community resources, etc.

Other: Examples of additional Related Services are "Orientation/Mobility" for students with visual impairments; "Sign Language Interpreter" for students who are deaf or hard-of-hearing.

Section XII: Statewide/District Assessment Programs

It is expected that the majority of students with an IEP will participate in state/districtwide assessments. If students with disabilities are participating in the general curriculum, it is inferred that these students will be participating in the regular statewide and districtwide assessments.

Excluding students from statewide and/or districtwide assessments will make the student **ineligible** for a Standard Diploma. This option and its potential consequences must be fully discussed with the IEP Team and especially the parents.

If the student is being considered for alternate assessment, answer the four questions to determine if the student is appropriate for alternate assessment. For the IEP Team to determine that a student will participate in alternate statewide/district assessment, all answers to the four questions must be YES.

Section A: Select applicable radio button to determine the appropriate assessment participation for the student.

Section B: Check and describe the needed accommodations for assessments. This includes accommodations needed for any assessments (statewide, district, and/or classroom tests). Example: Check "Flexible Setting" and describe what setting is recommended, such as "small group." Check "flexible responding" and describe how the student is to be allowed to respond, such as "oral responses."

Indicate the accommodation(s) to be used during BOTH formalized statewide/districtwide tests AND classroom tests. For formalized tests, only those accommodations allowed in the manual instructions may be used. Accommodations recommended for formal assessments should be documented as a need for the student's total educational environment, as well.

Indicate for which tests the student is to receive the specific accommodation(s) described. This may include classroom, statewide and/or district assessments. Be as specific as necessary in addressing the student's unique needs.

Only accommodations indicated in the test administration manuals as allowable may be used for state/districtwide assessments.

Section C: FCAT/EOC Waiver (when applicable)

Check the statements that are applicable to this student.

Informed written parental consent is required when the IEP Team determines that the administration of an alternate assessment and the provision of instruction in the state standards access points curriculum is appropriate for a student. Refusal of the parent/guardian/surrogate

parent/age-of-majority student to consent to this determination of the IEP Team means that the school district may not proceed with the action refused, without the school district pursuing a due process hearing to address the refusal. During the pendency of a due process hearing, or the appellate proceeding regarding a due process complaint, the student shall remain in his or her current educational placement while awaiting the decision of any impartial due process hearing or court proceeding, unless the parent/guardian/surrogate parent/age-of-majority student and the school district agree otherwise. The school district may proceed with the actions described above without consent when reasonable efforts to obtain the consent have been documented and the student's parent/guardian/surrogate (or the age-of-majority student) has failed to respond; or when the school district obtains approval to proceed through a due process hearing and/or appeals process. The consent form titled "Florida Department of Education Parental Consent Form/Prior Written Notice Instruction in the State Standards Access Points Curriculum and Florida Alternate Assessment Administration" (SB 34517) is used for the purpose of requesting parental consent for the administration of an alternate assessment and the provision of instruction in the state standards access points curriculum or for documenting the attempts made to obtain such parental consent.

In instances when a parent does not consent to the administration of an alternate assessment and the provision of instruction in the state standards access points curriculum, then one of two actions must occur:

1. Another IEP is developed for the student that does align with the parent's consent decision; or
2. The District files a request for a due process hearing, and the student's previous IEP is implemented during those proceedings, unless the District and parent agree otherwise.

When the IEP Team that is currently convened for the student is at a point where they do not agree that another IEP which aligns with the parent's consent decision is appropriate for the student, then the parent must be provided with the notice form (SB 34520) titled "Notice of Implications of Parental Consent Decision(s) Regarding ESE Placement/Type of Curriculum/State Assessment." The District will then, within 10 school days, either: (1) convene a follow-up IEP meeting for the student, or (2) file a request for a due process hearing. ***If this notice form is utilized by the IEP Team, the school's Staffing Specialist or another member of the Area Office's ESE Team must be contacted immediately so that the District may plan for the next action (either schedule and convene a follow-up IEP meeting OR file a due process hearing request).***

Section 1008.212, Florida Statutes, allows that an IEP Team may recommend an ***extraordinary exemption*** for a student from participating in *any* state assessments. This determination must be made within a prescribed time (*no later than 60 days before the current year's assessment window for which the request is being made*) and must be presented to the Superintendent, with required and extensive documentation, and then from the Superintendent to the Commissioner of Education for final approval. The parent may appeal the Commissioner's final decision, if not satisfied with the outcome. This is a serious recommendation for the IEP Team to consider and the ESE Department should be consulted in advance for guidance and assistance. An IEP Team's recommendation for extraordinary exemption should only be made in rare instances (such as for a student who has recently lost total sight and is not yet able to read Braille). An IEP Team's recommendation for an extraordinary exemption is not appropriate for a student at the emergent level in regard to Florida Alternate Assessment. This recommendation should only be made for a student with a disability for whom the IEP Team determines is prevented by a circumstance or condition from physically demonstrating the mastery of skills that have been acquired and are measured by a state assessment. A learning, emotional, behavioral, or significant cognitive disability, or the receipt of services through the Hospital/Homebound Program is not, in and of itself, an adequate criterion for the granting of an extraordinary exemption.

Section XIII: Special Considerations

The IEP Team must take all the items in this section under consideration.

Answer ALL questions “A” through “H.” These areas address needs that must be considered, and thoroughly discussed, by the IEP team.

Section XIV: Least Restrictive Environment Review Summary

IDEA 2004 requirements clearly state that, to the maximum extent appropriate, students with disabilities must be educated with students who do not have disabilities. The law also clearly states that special classes, separate schools or other removal of students with disabilities from the regular educational environment may occur only if the nature and severity of the student’s disability is such that regular education classes with the use of supplementary aids and services cannot be achieved satisfactorily. The general education setting is the first placement consideration for all students.

To ensure that the student is educated with non-disabled students to the maximum extent appropriate it is necessary to consider direct services needed, accommodations/modifications needed and any potentially harmful factors that may result.

Section A: Summarize the amount of time the student is included in a setting with non-disabled students. Using the number of minutes in the school week (from bell to bell) at the school that the student will be attending during the implementation of this IEP, check the appropriate box.

Special education services delivered in the general/regular class setting (co-teaching, for example) are counted as time with non-disabled students. The procedure below may be helpful, however it is the responsibility of the ESE Teachers to know the minutes in the school week at their particular schools. In calculating non-disabled minutes, passing time in the hallways, lunch in the cafeteria with the general population of the school should be included as non-disabled minutes

Formula/Procedure for determining percentage of time removed from non-disabled students:

Divide the total number of minutes in the school week INTO the total number of minutes the student is removed from the regular class for special education services.

Move the decimal point to the right 2 places. The answer is the percentage of time that the student is being removed from the regular class.

Subtract that number from 100. This is the amount of time the student remains with non-disabled students.

Example: 600 (total minutes out of regular class for ESE) divided by 1875 (total minutes in school week) = .32

Move the decimal point 2 places to the right = 32; this is the percent of time removed from non-disabled students for special education services.

Subtract from one hundred: $100 - 32 = 68$. This means 68% of the time the student is with non-disabled students, therefore we check the second box more than 40% with non-ESE students.

Section B: Check “Yes” if the student is to spend any part of their school day with non-disabled students.

Check all of the reasons that the student will be participating with non-disabled students.

If “No” is checked, the team must explain why the student is to be excluded from non-disabled students.

Section C: Check “Yes” or “No.”

This section is completed if students are to be removed from the regular class setting for any portion of the school day.

Check all factors that the team feels might be harmful to the student in a less restrictive setting.

Check all placements previously attempted with this student.

Check all accommodation/modifications previously attempted or considered

Summary of Data/Delivery of Services

Type of Meeting: Indicate with checks all of the reasons for which the meeting is being held, as indicated on the prior parent notification (MO-12) and as relevant to discussion that was brought up at the meeting that was not anticipated when the notice was sent home to the parent. The IEP discussion topics should be documented in the Additional Comments section of the IEP (such as discussion of reevaluation needs) or on a Conference Summary (MO-31) form, or other section of the IEP, as applicable.

Indicate the **ESE placement** by using the total amount of time the student will be receiving special education services **outside the regular class**. (See example in Section XIV.)

ESE placement should not be confused with service delivery model. ESE placement is defined by federal standards as total time removed from non-disabled students. ESE placement is determined by totaling all time the student is removed from non-disabled students for special education services. For example: A student receives instruction and therapy in resource room settings for more than 60% of the day. Although the delivery model used is “resource,” the ESE placement category is “special class.” Separate class is defined as “more than 60% of special education services outside regular class.” Regular Class example is defined as Regular Class with supports including students seen outside regular class for up to 21% of the time.

Informed written parental consent is required when the IEP Team determines that the appropriate placement for a student is an exceptional student education (ESE) center. Refusal of the parent/guardian/surrogate parent/age-of-majority student to consent to this determination of the IEP Team means that the school district may not proceed with the action refused, without the school district pursuing a due process hearing to address the refusal. During the pendency of a due process hearing, or the appellate proceeding regarding a due process complaint, the student shall remain in his or her current educational assignment while awaiting the decision of any impartial due process hearing or court proceeding, unless the parent/guardian/surrogate parent/age-of-majority student and the school district agree otherwise. The school district may proceed with the actions described above without consent when reasonable efforts to obtain the consent have been documented and the student’s parent/guardian/surrogate (or the age-of-majority student) has failed to respond; or when the school district obtains approval to proceed through a due process hearing and/or appeals process. The consent form titled “Florida Department of Education Parental Consent Form/Prior Written Notice Student Placement in an Exceptional Education Center” (SB 34518) is used for the purpose of requesting parental consent for placement of a student in an exceptional student center or for documenting the attempts made to obtain such parental consent.

In instances when a parent does not consent to placement in an ESE center, then one of two actions must occur:

1. Another IEP is developed for the student that does align with the parent’s consent decision; or
2. The District files a request for a due process hearing, and the student’s previous IEP is implemented during those proceedings, unless the District and parent agree otherwise.

When the IEP Team that is currently convened for the student is at a point where they do not agree that another IEP which aligns with the parent's consent decision is appropriate, then the parent must be provided with the notice form (SB 34520) titled "Notice of Implications of Parental Consent Decision(s) Regarding ESE Placement/Type of Curriculum/State Assessment." The District will then, within 10 school days, either convene another follow-up IEP meeting for the student, or file a request for a due process hearing. ***If this notice form is utilized by the IEP Team, the school's Staffing Specialist or another member of the Area Office's ESE Team must be contacted immediately so that the District may plan for the next action (either schedule and convene a follow-up IEP meeting OR file a due process hearing request).***

Indicate the **name of the school** to which the student will be assigned. Follow district pupil assignment procedures to locate the most appropriate services nearest the student's home or area of assignment school based on residence or choice plan. Every effort should be made to serve students at their area of attendance schools.

Current Areas of Eligibility: Check all areas for which the student is currently eligible. (The student will have been found eligible by a Staffing Committee for any ESE program that is checked. Staffing Committee results are documented on an MO-1. J-screen information is helpful documentation. The documented areas of eligibility on the J-screen, in the IEP and on the Matrix of Services form **MUST** all match.)

Informed Parental Consent for Instructional Accommodations (form SB89043): Check appropriate box, and attach the completed form, with parent signature, to the IEP, when applicable. If the parent has not provided permission for the instructional accommodations and/or if the parent has not returned the form containing their signature providing consent, then the instructional accommodations cannot be implemented and the IEP Team must reconvene and revise the IEP to remove the instructional accommodations that are not allowable on FCAT.

Additional Comments/Other Pertinent Information/Revision/Reevaluation Information: Use this section to add applicable comments.

For IEP Revisions: Whenever the IEP is revised this section is completed. In this section indicate anything that was revised in the IEP, list any goals that were added or deleted, any services that were changed, etc.

For example: "IEP revised 11/19/01, added goal # 5, attached present level supplement page 2B, attached goal 5, attached new Services page 6 and new summary sheet."

When a current IEP is being revised, the current IEP information in the Present Level Narrative section and the Additional Comments section is NOT to be deleted or changed. Any new or updated information should be entered as an addendum. For example, at the end of the Present Level Narrative section in existence, write "Addendum dated xx/xx/xxx:" followed by new and/or updated information.

If, during a revision, the percentage of time that the student is removed from the regular class changes the placement indicated on the previous IEP then a *Notice of Intent to Change Eligibility and/or Placement* (form SB89035) is provided to the parent. A Notice of Intent to Change form must be completed when a change of placement occurs or when there is a significant change in the provision of FAPE (free appropriate public education).

Examples of a change in the provision of FAPE:

- The student goes from regular class with support to regular class with resource services as placement category due to more time recommended outside regular class.
- The student's Occupational Therapy time is increased.

For Reevaluation Results: The Additional Comments section of the IEP is also used for addressing any additional information the IEP Team wishes to document regarding this student and reevaluation needs/results. A Conference Summary sheet (MO-31) may be used to document reevaluation results discussion when more space is needed. Indicate in this section if a Conference Summary sheet is attached.

It is extremely important to use this section to document that additional documents are attached to this IEP. This will help to ensure that the complete and final IEP is available to the reader.

If the parental consent form to invite agency representative(s) (SB89003) was not returned or parental consent was denied, write “parental consent to invite agency representative(s) to the IEP meeting was sought but not obtained”.

Change in FAPE* (Free Appropriate Public Education)

*(*Definition of FAPE: Special education and related services that are provided at public expense, supervision and direction, without charge to parents; meet standards of SEA; include appropriate preschool, elementary or secondary education; and are provided in conformity with an IEP.)*

All eligible students with disabilities enrolled in public school are entitled to FAPE, a free appropriate public education. FAPE* is considered changed when the services identified on the IEP significantly change. A change in supplementary aids and services, the addition or deletion of a related service, a change of counseling services from three times a week to once a month, or the provision of an aide for a student are examples of a change in FAPE. These changes may or may not result in a change in the time the student spends with non-disabled peers.

Parents of eligible students with disabilities must receive prior written notice of a change of FAPE before the change occurs. The *Notice of Intent to Change* form (SB89035) is used for this purpose

Change in Placement

A student’s placement is considered changed when the IEP Team significantly changes the amount of time the student will be separated from his/her non-disabled peers for the purposes of receiving special education services. The amount of time is significantly changed when a student’s educational placement falls within a different category as defined by the Office of Special Education Programs (OSEP).

Parents of eligible students with disabilities must receive prior written notice of a change of placement before the change occurs. The *Notice of Intent to Change* form (SB89035) is used for this purpose.

Refusal of a Parent’s Specific Request to the IEP Team

At times, a parent will make a specific request to the IEP Team which is denied. For any and all requests that a parent makes to the IEP Team, the request must be discussed and considered by the IEP Team.

After that discussion and consideration, if the IEP Team refuses the specific request of the parent, then a notice of refusal must be provided to the parent. The *Notice of Refusal to a Take a Specific Action* form (SB89026) is used for this purpose. The Supervisor for ESE Compliance (273-7060), the Supervisor for ESE Staffing (273-7035) or members of the ESE Team located at each Area Office are available to provide assistance to school personnel in the completion of this form.

Dates/Signatures

Dates: Fill in the date of the **Current IEP**, **IEP Review Due Date**, the **Reevaluation Due Date**, the **IEP Anticipated Initiation Date** and the **IEP Anticipated Duration Date**.

For IEP revision meetings, the **Current IEP** date remains the same. The **Current IEP date** signifies the **Annual Review IEP** date. The **Anticipated Initiation Date** is changed at the conclusion of an IEP revision meeting to reflect the date that the revised IEP will be implemented. The IEP date DOES NOT change on the J-screen for IEP revisions. The field on the J-screen for **Current IEP date must match the date of the IEP Annual Review meeting**.

IEP Reevaluation Due Date is calculated by determining three years from the last assessment completed during the reevaluation of the student.

All participants in attendance should sign the IEP.

- √ Parent/Guardian/Surrogate: Signature appears on IEP when in attendance. If not in attendance, Case Manager writes comment on parent signature line, such as “see MO-12 dated_____” to reference initial notice/invitation to parents and all attempts to encourage parent participation. (When filling in the blank, use initial date of notification.)
- √ ESE Teacher/Therapist/Provider: Attendance and signature required.
- √ Regular Education Teacher: Attendance is required if student is or may be participating in the regular education environment. Signature appears when Regular Education Teacher attends meeting. If parents give consent to excuse the requirement of Regular Education Teacher’s attendance, written input must be provided in advance of the IEP meeting to the parents and to the IEP Team. When this occurs, Case Manager writes statement on Regular Education Teacher signature line, such as “See Planning Notes and Excusal Consent form dated _____.” NOTE: If Planning Notes are used for this purpose (in lieu of Regular Education Teacher’s presence at the IEP meeting), then the Planning Notes or other written input are attached to the IEP and filed in the Student Resource Folder and in the ESE Documents Folder and the Cumulative Folder. **Planning notes are only sent to Central Files, for students with a Matrix Level Support Level 4 or 5, when the planning notes are used in lieu of the IEP Team member’s attendance at the meeting.** With the written agreement of the parent and IEP Team, the Regular Education Teacher may attend only the portion of the IEP meeting relevant to his area. If this occurs and the signature page is available for the Regular Education Teacher at the time of his/her departure from the meeting, he/she may sign at that time. The Conference Summary form or the “Additional Comments” section of the IEP will contain the appropriate statement acknowledging agreement of the partial attendance. If the signature page becomes available after the teacher has left the meeting, the ESE Case Manager may write the following statement, or a similar statement, on the applicable signature line: “*Attended a portion of the meeting/left with agreement of parent and IEP Team prior to signing.*”
- √ Evaluation Representative: Attendance and signature required. If a professional fulfills the role of Evaluation Representative as well as another role at the IEP meeting, then he/she should sign twice. (However the LEA Representative may **not** fulfill a role other than LEA Representative for a given IEP meeting, and will only sign one time.)
- √ Student: Signs when in attendance. (For Transition IEPs, students must be encouraged to participate. Methods used to encourage and include student participation are documented in Section III of the IEP.)
- √ Other Personnel: Sign when in attendance.

- √ **LEA Representative:** Attendance and signature required. (The LEA Representative fulfills only this designated role at the IEP meeting and may **not** sign the IEP on any other signature line.)
- √ **Agency Representative(s):** For students 16 years or older during the duration of the IEP, representatives of agencies who may be providing or paying for services who attend the meeting will sign the IEP. If the parental consent to invite agency representative(s) (SB89003) was not returned or if parental consent was denied, write “parental consent to invite agency representative(s) to IEP meeting was sought but not obtained.” If agency representative was invited and did not attend, write “parent gave consent and agency representative was invited but did not attend.”
- √ Date that signatures were obtained is documented.

NOTE: Parent or any personnel not in attendance must not sign the IEP. When parents are in agreement for the IEP Team meeting to be held without them, the prior parent notification form (MO-12) will document this. The Case Manager will reference the initial date of notification on the parent signature line (“See MO-12 dated _____”). **The IEP is finalized at the IEP meeting. No parent signature or any other signature is added at a later time.**

Compiling the IEP Forms

Completed IEPs that have been agreed to by the IEP Team and signed by the IEP Team participants may not be changed or edited unless an IEP revision meeting is convened.

The IEP forms are to be compiled in the same sequence as the activity occurs.

Attach any applicable additional forms/sheets to the IEP, and organize in the following manner:

- Prior Parent Notification (MO-12) (place on top of the completed IEP).
- Conference Summary (MO-31), when completed during the meeting (place between MO-12 and IEP)
- IEP document, including signature page
- Parental Consent for Excusal/Consent for Inviting Agency Representative(SB89003), when applicable
- Planning Notes (SB89008), when parent has consented to excusal of an IEP Team member
- Parental Consent for Instructional Accommodations (SB89043), when applicable
- Form to document attestation of parents and IEP Team members regarding whether or not the parents were prohibited or discouraged from bringing a person of their choice to the meeting (SB34519)
- Parental Consent for the Provision of Access Points Curriculum and Alternate Assessment (SB34517)
- Parental Consent for Placement in an Exceptional Student Center (SB34518)
- Other form(s), including any applicable notice forms

Matrix of Services Form

NOTE: *The Matrix of Services Handbook and/or Fast Facts #20 should always be referenced when a matrix form is completed or reviewed.*

- A Matrix of Services form (FM 14111) must be completed on every student with disabilities at his/her initial eligibility/IEP meeting. As described in Fast Facts #20, at least two ESE personnel must complete the matrix form; and at least one of the two ESE personnel completing the matrix

form must have completed the Matrix of Services Update Training, during or after the 2002-2003 school year.

- For all students with a cost factor of **251**, **252**, or **253**, the Matrix of Services form never has to be reviewed unless services increase and/or student eligibility changes to the degree that it may be likely that the cost factor could increase to a **254 or 255**. (**NOTE**: An exception is that for all students with IEPs who are enrolled in DJJ or in Charter Schools, a matrix form must be completed after each IEP meeting, regardless of the cost factor.)
- For all students with a cost factor of **254** or **255**, the current Matrix of Services form must be reviewed and initialed each time an IEP meeting is held.
- If the Matrix of Services form has been reviewed/revised three times or is three years old, a **new** Matrix of Services form **must** be completed.

Distribution of IEP

Completed IEPs that have been agreed to by the IEP Team and signed by the IEP Team participants may not be changed or edited unless an IEP revision meeting is convened.

Duplicate/distribute IEP and associated forms according to distribution at the bottom of the pages:

- Original to Cumulative Folder [This is the auditable document and should be placed in the “ESE Documents” folder. Indicate the IEP date and any other forms placed in the “ESE Documents” folder in the space provided on the front of this folder (may indicate “IEP dated xx/xx/xx”).]
- Copies to Central Files (as applicable with appropriate cover sheet, only for students with a Matrix ESE Support Level 4 or 5), ESE Student Resource Folder and the parent.
- **The parents should receive their copy immediately following the completion of the IEP Team meeting.**

All documents attached to the IEP are a part of the Individual Educational Plan, a legal document, for the student.