

## Protocol for Leading Annual Reviews\*

- I. State the purposes of the meeting (to review progress made during the current year and to develop an IEP for next year) and begin introductions, if necessary.
- II. Begin by asking the parents to share their perceptions about the child's year. The special teacher should note any concerns expressed by the parents on the new IEP Section IVA, page 2 (2-3 min.).
- III. Special ed. teacher's report on progress toward goals in the current year's IEP and on current performance level information (3-5 min.).
  - Sp. teacher should hand a copy of the goal/obj. pages with progress monitoring notes written on them to the parents then verbally report to the group based on those pages. Be sure that each objective/goal is described as met, partially met, or unmet and that descriptions or explanations are provided as needed. *Alternative:* send these pages out to parents before the IEP meeting and check to see that parents understood what was sent home.
  - Be sure that current performance levels in all areas of deficit relating to the child's disability are described. Specifically, EBD students' must have problem behaviors and their related functional intent listed under the social/emotional section of the IEP. All teachers should briefly review the relationship between the child's disability and performance in the general curriculum (or in the natural settings for preschoolers).
  - Be sure to address and list student strengths under the current performance levels sections, too. Best if specific skill strengths can be listed within each area of deficit so that they can be used as one tool for helping the child to overcome the deficit areas.
  - For students age 14 or older, a statement of that student's goals for after graduation (called a post-school vision using special education jargon) listed under the vocational section: Statement of preferences for living arrangements, employment, and/or post-secondary education.
- IV. Repeat III from perspective of related services providers (2-3 min. each).
- V. Ask general education teacher to contribute observations about the child's actual or probable performance or in that setting--for example, impact of disability on participation and performance in the standard curriculum; successful strategies or adaptations.
- VI. Ask the special education teacher and related services providers to present suggested goals/objectives or benchmarks to the IEP team for consideration (10-15 min.).
  - Seek parental input and gen. ed. teacher input into the appropriateness of the goals/objectives or benchmarks for that child at that time. Best practice would be for sp. teachers to have already sought input from parents and general educators before writing proposed goals or to have shared them in advance so that parents and teachers had a chance to consider them well before responding.
  - Set priorities and seek consensus as a group around what those priorities are for that child to learn in the next year and while considering the goal of maximizing the child's participation in the general curriculum.

- Adopt or adapt goals/objectives or benchmarks as needed. Be open to writing different or additional goals/objectives or benchmarks at the request of the parent with consensus from the IEP team.
  - Explain how and how often parents will be apprised of the student's progress toward meeting those goals during the upcoming year.
- VII. Determine necessary levels and types of support for the child to meet IEP goals/objectives or benchmarks (IEP page 5, Section VII; 15-20 min.).
- Consider supplementary aids and services, program modifications, specialized equipment, or assistive technology needs that might allow the child to participate meaningfully in the standard or general curriculum. Get input and/or feedback from the general education teacher.
  - Likewise, consider needed supports for the general education classroom teacher(s) that would help him/her to include this child more meaningfully into the activities of the classroom. Get input and/or feedback from the general education teacher.
  - Write BMP, or positive behavioral intervention strategies, as needed. Get input and/or feedback from the general education teacher.
  - Consider and document participation in state and local assessments.
  - Consider recommendations for minutes per week of special education and related services and list the agreed upon minutes per week, starting date, and duration and location of services. Document on page 1, Section III.
  - Special considerations must occur for special populations:
    - Blind or visually impaired? Consider need for Braille
    - Deaf or Hard of Hearing? Consider communication needs
    - Limited English proficiency: Consider needs for language dev.
- VIII. If the student is age 14 or older, write transition plan at IEP (20 min.).
- Review student's goals for after graduation (post-school vision).
  - List needed services and service providers who will help the child work during toward meeting those goals. At least one type of instruction, community experience, and other activity to promote achievement of the post-secondary outcome desired by the student.
  - For students who need assistance with daily living skills or who might need what is called a "functional vocational assessment," list those services and providers.
  - Know that for students who will be 14, but not 14.5, during the implementation of the IEP that is being written, the team may elect to write only the statement prompted at the bottom of page 6 and not to write a complete transition plan.
- IX. Turn to page 6, Sections VIII and IX of the IEP. Consider and explain placement options and IEP team decisions regarding placement (10 min.). Complete:
- Options considered and reasons why rejected options were viewed as inappropriate or undesirable for this student.
  - Explain the extent to which the child will not participate in the general education classroom or in non-academic activities.

- X. Other considerations (Sections X-XIII of the IEP, pages 6-7). Complete:  
Transportation  
Need for extended school year  
Document transition planning  
Other as appropriate.
- XI. When applicable (student due for a 3-year reevaluation; DD student about to turn 6), lead IEP team through decisions relating to reevaluations. Refer to Reevaluation Decisions Guide for details (20 min.).
- Begin with a review of previous results, records, newly submitted outside evaluations, and current performance information.
  - Proceed to determining whether or not it is necessary to determine continued eligibility for special education services.
  - Consider evaluation questions and needs to address programming.
  - Plan evaluation, as appropriate.
- XIII. Review paper work/procedural safeguards listed on IEP with parent, attain signatures of participants, remind parents about the copy of their rights mailed with staffing notice--ask if they have any questions.
- XIII. Thank everyone for attending. Dismiss.

### **Suggestions for Efficiency**

Try to meet or beat the time suggestions listed next to most sections, realizing that times will vary due to the complexity of the child's needs and of the decisions being made.

Write in more detail on IEP, but make oral reports brief. Oral reports should contain most important/relevant information, not all information.

Focus IEP team attention on those areas of schooling where the child's disability adversely affects performance/participation.

Include parents in their child's IEP progress throughout the year and not just at the time of the annual review.

Do as much communication with parents and preparation of paperwork as possible before the annual review, but be flexible and realize that IEP teams, not individuals, make decisions. Do what you can to uncover and generate possible solutions to issues before the meeting. Special teachers *may* do the following prior to annual reviews:

Update goal/objective pages and send them home to parents for review prior to the meeting. Communicate with parents about their concerns and write those on the IEP.

Complete current performance levels and background information prior to the meeting.

Write goals/objectives in advance, to be considered by the IEP team at the meeting. Ideally, these goals/objectives would be sent home to parents for their consideration prior to the annual review. Ditto: Transition Planning Guide with prior student and parent input.

\*This guide for leading annual reviews was developed after IDEA 97 to help IEP team leaders to remember and organize all of the content required of IEP meetings. It is intended only to be a helpful tool. IEP team leaders may use the protocol as a starting point for planning IEP meetings, but will want to adjust the timelines and content to individual circumstances.

