

## How to Conduct Friendly and Productive IEP Meetings

Wisconsin Special Education Mediation System

With acknowledgement to parents and districts throughout WI, the WSEMS Roster of Mediators and Facilitators, and the National Center for Appropriate Dispute Resolution in Special Education (CADRE) for their contribution to these materials.  
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## Presentation Purpose

- To provide feedback from parents and districts in Wisconsin about what worked and what didn't work in IEP meetings.
- To provide constructive and practical tips and techniques to increase the productivity of an IEP meeting.
- To support both parents and districts in developing stronger relationships.
- To remain student-focused in the IEP process.



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## Four Areas To Build Success in an IEP Meeting

- People
- Process: Preparation, Arrival, and Meeting
- Outcome
- Follow-through



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## People



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## Introduction People

- Building trust and a good relationship between parent, student, and district is very important in conducting a productive IEP meeting.
  - Think about who would be most helpful in building a connection or who already has a relationship with the family and/or student.
  - Have people attend who have a real knowledge of the student, the programs, the opportunities and the data.



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## Participants' Comments

- *“The most help during the IEP was personnel there who could answer my questions. They knew the content of courses and could explain their significance in the big scheme of my child's education.”*
- *“It was so nice to have my child's teacher there because she is the one person who I feel I can talk to.”*
- *“There was no one that I could connect with – all the professionals took over.”*



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## Bringing People Together



- Make certain the right people are at the meeting.
  - Encourage the student to attend the meeting.
  - If the parent and/or student has a good relationship with particular district personnel or agency representatives ensure they can be present.
- Be aware of language and special needs of parents and students prior to meeting.
- Use positive language and tone, especially when the student is present.



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## Participants' Comments

- *"In front of my child, the IEP teacher said that my child is far behind academically and that her reading is at a second grade level. The teacher said that she can't teach my daughter new skills. My 16-year-old exploded into crying and refused to come back to the meeting."*
- *"During the IEP meeting, the teacher explained to my child, in terms he understood, the progress he has made and also talked to him about goals and objectives so that he'll know what he is going to be working on during the coming year."*



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## Creating Connection



- Create a positive connection prior to the actual meeting. Make a special effort to reach out if the student or family are new to the district.
- Make sure that comments are directed to the student, not just about the student, if he/she is present.



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### Participants' Comments

- *"Things heated up pretty quickly and no one at the meeting was really prepared to deal with it. We need more expertise in how to deal with conflict itself."*
- *"Parents need to feel safe, and heard. Sometimes when the power or aggressiveness of one parent is strong it can be very uncomfortable. All professionals need some training in dealing with difficult conversations."*
- *"I have knowledge in special education – I do not have knowledge in dealing with highly emotional or difficult situations. That knowledge would have helped me!"*



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### Understanding Conflict



- Provide practical skill development in:
  - Understanding sources of conflict
  - Effective communication techniques – both in listening and speaking
  - Problem-solving techniques
  - How to manage high stress and difficult situations
- Refer to videos/webinars/ manuals /resources on the WSEMS website.
  - Resource: <http://www.wsems.us>



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### Understanding Emotion



- Be aware of any existing difficult relationships or highly emotional topics.
- Identify staff members who are the most effective at re-directing high emotion and who work well with the parents.
- Have a plan to deal with difficult emotions or situations.



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### Process

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### Introduction Process

- Always remember “the beginning impacts the end.”
- Establishing a positive relationship in the beginning of the parent/district relationship is essential.
  - Separate people from the problem/disagreement.
  - Focus on interests, not positions.
  - Treat everyone with respect.
  - Stay focused on the student throughout the process.
  - Be open and creative in exploring ways to meet the student’s educational needs.

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### 2014 Survey

- In a 2014 survey of Wisconsin parents:
  - 55% indicated that they had been given a least a month’s notice of the IEP meeting,
  - 76% said they were asked to suggest convenient times and dates,
  - 65% stated they were asked if there was anything special about their child’s academic or functional performance that they would like to discuss at the meeting.

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### Participants' Comments Process - Preparation

- *"I appreciated that the district contacted me prior to the meeting and really stressed that I was an important part of the team. It felt like they really wanted my input."*
- *"By far the most helpful thing has been to meet with teachers and providers ahead of time so we are not bogged down with minutiae and can focus on longer term goals and broader perspective."*
- *"I felt the district already had the entire IEP written in their heads before I got there."*



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### Participants' Comments Process- Preparation

- *"I always ask for a brief meeting and an IEP draft before the meeting to kind of "pre-plan." Staff is usually willing to do this, but wouldn't if I didn't ask."*
- *"We did not receive timely information as to who would be at the meeting. The district brought a therapist that we did not know about."*
- *"We received written notification that several staff that worked with our child were going to be present at the IEP. In actuality, only the lead special-education teacher was present. This was misleading in our opinion."*



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### Participants' Comments Process- Preparation

- *"I was notified about the IEP meeting the day before."*
- *"We have never finished a meeting in the time allotted. It would be very helpful to have team meetings in advance of the actual IEP meetings to begin developing the present level and goals, so we are not always forced to have another meeting, which inevitably is not a good time for us."*



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### Prior to the Meeting



- Be prepared.
- Prepare a **draft agenda** and ask for staff and parents' input. Give them sufficient time to respond.
- Consider sending a form to staff and parents asking for ideas about the meeting.
- Consider sending parents a questionnaire (concerns, strengths, thoughts) to better understand their potential issues.



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### Contact Prior to the Meeting



- The case manager can contact IEP team members to go over logistics (agenda, location, date & time, accommodations needed).
- The case manager should stress to the parents, student and staff how important their presence will be at the meeting.



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### Understanding the IEP



- If the parents have never seen an IEP form, offer to send them a blank IEP form.
- It may be helpful to share a draft IEP in advance (if available) with all IEP team members.
- Express to all members of the IEP team that everyone's input is essential to fully develop the IEP. A draft IEP is a working document.



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### Exchanging Information Prior to the Meeting



- In order for everyone to be prepared, districts and parents are encouraged to share IEP-related reports before the meeting
  - Reports should be read by all team members before the meeting whenever possible.
  - Consider a short informal meeting with the parents before the IEP meeting to go over new data and recent test results.



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### Ensuring the Right People are Present



- Have a copy of the current IEP for reference – make sure the parent has a copy.
- The IEP invitation should list all the people who will be attending the meeting.
- The parents should notify the district also if they plan to bring someone with them.
- If a team member is not able to attend, the district must notify the parent and give them an option to re-schedule the IEP meeting if the parent would like the person there.



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### Participants' Comments Process - Arrival

- According to the 2014 parent survey, only 21% were met and welcomed outside of the meeting room by the district.
- Less than 6% of parents were provided water in the meeting.
- Some parents indicated that the first time they met some of the district personnel was sitting across the table in the meeting.



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### Creating a Comfortable Environment



- Insure comfortable waiting area and meeting space.
- Provide easy access to restrooms, outside area, water and/or snacks, and a a space for the parents (and their advocate, if they have one) to take a break or have private conversations.
- Have pens, paper, tissues, water in the room.
- Create seating arrangement that is customized to the particular situation (relaxed/formal, location of specific personnel and parents, etc.)



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### First Impressions



- Promptly meet parents in the school office and introduce yourself.
- Once inside the room, go around the table and have everyone introduce themselves and their roles on the team.
- If members of the team are not all familiar with each other, have name cards (easier to read than name tags).



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### Participants' Comments Process - The Meeting

- *"The parent used the IEP meeting as an opportunity to vent about the district. We didn't talk about the IEP itself until two hours into our meeting."*
- *"I appreciate that the case manager kept the meeting focused on the goals."*
- *"Higher level personnel who did not know my child seemed to be making the decisions. The teacher, who was the most knowledgeable, did not seem to have much power."*



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## Beginning the Meeting



- The case manager should summarize the goals at the beginning of the meeting.
  - Focus on the student’s educational needs.
  - Refer to the agenda for time-frames, as well as reinforcing commitment to attend entire meeting.
  - State that a second meeting can be scheduled if unable to finish everything in one meeting.
  - Non-IEP-related issues will be written down for discussion at another time (large whiteboard or easel).



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## Beginning the Meeting (Continued)



- Guidelines can be developed as a group, or the case manager can share suggested rules for the meeting.
- Some possible ideas are
  - Stress that everyone’s ideas will be respected.
  - Everyone will have a chance to speak.
  - Plain language will be used.
  - Put phones on vibrate or silent.
- Have a clock on the wall so all can see it clearly.



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## Participants’ Comments The Meeting

- *“It was nice that the district talked about my child’s strengths, as well as his challenges. It made me feel that my child was a student – not a problem.”*
- *“Our IEP meeting was a positive experience. We were in a half circle facing white pads on easels. The strengths of my son were listed in big bright colors. True strengths, not just what he enjoyed doing. This set the tone for the entire meeting. They saw him for who he was, and not for the challenges he had. This also allowed the team to focus on how to best use those strengths to problem-solve other areas of concern. The chairs facing the boards also felt to me that the entire team were focused on him, not on disagreements among the team.”*



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### Working Together at the Meeting



- Participatory Exercise at IEP Meeting
  - Put up two sheets of flip chart paper with one sheet titled “Strengths” and one sheet titled “Challenges.”
  - Starting with “Strengths,” ask each participant to identify one or two of the student’s strengths as a learner and then go around again and list “Challenges.”
  - Participants then review the lists and indicate how the data informs them about the student.
  - This should be a quick, introductory activity to focus on the student and show a balance between strengths and challenges.



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### Participants’ Comments Process - The Meeting

- *“The district had so many people there that I felt I had very little time to talk. They were nice to me, but I felt as though I hardly got to say anything.”*
- *“We appreciated it when we were asked to speak early in the IEP meeting about our concerns and new goals without having to demand to do so.”*



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### Communication at the Meeting



- The case manager should:
  - Start with open-ended questions.
  - Balance “talk time” of district and parents, even though there may be more district personnel.
  - Record the discussion points/options/agreements/disagreements. Have a scribe so that the case manager can focus on the parents and not be writing notes.
  - Have a list of “parking lot” issues – i.e., things that need to be talked about but may not fit in the IEP meeting format.



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### Participants' Comments The Meeting

- *"The issues in the IEP meeting were more appropriate for mediation. The issues were broader and came from the bad relationship between the district and the parent."*
- *"Trust could only be developed through a neutral third party. Glad we decided to go to mediation."*



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### Referral to WSEMS for IEP Facilitation



- While the case manager is still responsible for the IEP content, sometimes a neutral person who is not directly involved in the outcome can assist the parties in having a productive meeting.
- This is especially true when there is a difficult relationship between the district and the parent or there is a lack of trust.
- The facilitated meeting is still focused on the IEP, not on the broader issues that would be appropriate for mediation.



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### Referral to WSEMS for Mediation



- Either the parent or the district (or both together) can request mediation with WSEMS – although both need to agree.
- Mediation provides a place where disputes about IEP issues, eligibility, placement and denial of Free and Appropriate Public Education (FAPE) are addressed.



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### If IEP Not Completed



- If the IEP has not been fully developed, a date for completing the IEP must be determined by the participants. The case manager should:
  - Review the team's accomplishments for that day.
  - Check in with all team members about agenda items not completed, follow-up that might be needed, and the timeline for the next meeting.
  - The case manager confirms how copies of reports will be provided to everyone after the meeting, and by when.



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### If IEP Completed



- If an IEP has been developed, make sure that a communication plan between parent and district is developed and agreed upon.
  - Type of communication
    - Emails, phone calls, home/school notebooks , parent-teacher meetings
  - Frequency of communication
    - Once a week? (Progress report on short-term goals - for example, safety issues, effects positive behavioral supports in classroom)
    - Once a month? (Longer-term goals)



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### If IEP Completed (Continued)



- If an IEP has been developed make sure that:
  - The goals are easily understood in plain language.
  - Use data and facts for measuring progress.
  - If possible, give parent a draft of the IEP at the meeting.
  - Discuss the importance of the I-6 form.
  - Establish the specific timeline for completion of the IEP and when it will be sent to parent.
  - Provide specific dates/timelines throughout the year for review of goals.



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### IEP Provisions

- Make sure the IEP language is clear and specific.
  - EX: When including Positive Behavioral Supports in the IEP, describe how the supports will be implemented in the classroom.
  
  - EX: When describing school services as Speech and Language or Special Education Reading Instruction, be clear on the **amount, frequency and location** of these services. If these services cannot be described in daily or weekly allotment of time, make sure to describe the **circumstances** under which these services will be provided.



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### IEP Provisions (Continued)



- Make sure to consider IEP participants' underlying interests.
  - EX: In discussing the need for a one-to-one paraprofessional, consider such interests as the student's independence and safety.
  - EX: In transportation issues, consider such interests as the student's safety issues and district's required versus permissible services.



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### IEP Provisions (Continued)



- Make sure to consider both long term and short term needs.
  - EX: In discussing potential graduation, consider the student's academic credits and transition skills. Will another school year provide the student with additional employability skills necessary for competing in the job market?



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### IEP Provisions (Continued)

- Consider including a plan to “connect” parents with their child’s learning at home
- Teacher demonstrates to parents ‘fun’ learning activities associated with the IEP annual goal(s) in Math & Reading
- Parents may choose to use these activities at home



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### IEP Provisions (Continued)

- Consider student’s self-advocacy skills vs. district’s commitment of resources.
  - EX: When describing services on the IEP (I-9) summary:
    - “Supplementary Aids and Services,” such as calculator-use, should not be up to the student to request its use. The calculator should be available for the student’s use for all activities that necessitate the use of a calculator.
    - On the other hand, an annual goal may be developed that the student should be encouraged to ask for the calculator in order to address the student’s self-advocacy skills.



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### Follow-through



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### Introduction Follow-through

- Follow-through is an essential part of the IEP process as trust can dissolve if promises are made and then broken.
- The district has a legal obligation to implement the terms of the IEP.
- Have positive contact throughout the year to foster the continuing relationship between parent and district.



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### Participants' Comments Follow-through

- *"Do what the team has agreed to and what is in the IEP - if you can't, then let me know. It becomes very difficult to trust the people entrusted with my child's learning when the IEP is not followed."*
- *"There was no follow-up from school staff after the meeting. Each year I have to request a copy of the IEP. I ask for a progress report on IEP goals and am told the IEP satisfies that progress report. My child's report card does not list progress notes on any IEP goals. I received one email, no text - just an attachment with a complete negative overview from the case manager and it did not address specific goals."*



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### Communication



- If the IEP can not be sent to parent within the promised timeframe, contact the parent to explain the reason for the delay.
- Contact parent after the IEP is sent to see if there are any questions.
- Reinforce the communication plan in the IEP with the parent and remind them of the schedule to discuss progress on goals.



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### Conclusion

- An IEP meeting should be a chance for parties to collaborate, share expertise, be student-focused, encourage creativity, and utilize problem-solving skills.
- Thoughtful pre-planning, inclusive and constructive meetings, and consistent follow-through strengthen the parent/district relationship.



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### Resources

- Wisconsin Special Education Mediation System (WSEMS) <http://www.wsems.us>
  - Gia Pionek Valle (Intake Coordinator and System Administrator)
    - [gia@wsems.us](mailto:gia@wsems.us) ; 888-298-3857 (Toll Free)
- Department of Public Instruction (DPI on WSEMS) [http://sped.dpi.wi.gov/sped\\_wsems](http://sped.dpi.wi.gov/sped_wsems)
- CADRE – Wisconsin Exemplary Special Education Mediation Program
  - <http://www.directionservice.org/cadre/pdf/Profile%20Wisconsin.pdf>



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