In spite of the fact that federal law has required that school districts develop Individualized Educational Programs (IEPs) for students with disabilities for more than forty years, it is still a task that many find challenging. The term IEP is used to refer to the actual services that a school district will provide to meet the disability related educational needs of the student, the meeting where decisions are made about those services, and the document that is written to describe them. The development of that IEP document is the focus of this article.

IEPs describe the services that a school district will provide to ensure that a student with a disability receives a Free and Appropriate Public Education (FAPE). If an IEP is not specific enough, it is open to a wide variety of interpretations and confusion is likely. On the other hand, each IEP should be general enough to describe the program that will be provided without needing constant revision. If the wording in an IEP is too specific it limits essential flexibility to adjust to the student’s changing performance. In order to create a plan with as much clarity as possible, IEP teams may ask the following questions:

- Will the teachers, educational assistants, related service providers and administrators who will be working with this student, be able to understand what they are expected to do even if they did not attend the IEP meeting?
- Will the parents be able to understand what services are going to be provided, by whom and for how long?
- If this student moved to a new school district, would the service providers in that district be able to understand and implement this plan?

The Individuals with Disabilities Education Act (IDEA) requires that the IEP include a statement of the special education, related services and supplementary aids and services, based on peer-reviewed research to the extent practicable, to be provided to the child, or on behalf of the child, and a statement of the program modifications or supports for school personnel that will be provided to enable the child (34 C.F.R. §300.320(a)(4)):

- To advance appropriately toward attaining the annual goals. [34 CFR §300.320(a)(4)(i)]
- To be involved in and make progress in the general education curriculum and to participate in extracurricular and other nonacademic activities. [34 CFR §300.320(a)(4)(ii)]
- To be educated and participate with other children with disabilities and nondisabled children in extracurricular and other nonacademic activities. [34 CFR §300.320(a)(4)(iii)]

When an IEP team takes the time to ensure that all planned services are described in a clear manner in the appropriate places in the written document, each person on the student’s educational team can better understand what is needed for successful implementation. This is especially true for related service providers who may not be able to participate in the IEP meeting. Clear, thorough documentation helps to improve the student’s education as well as reduce the potential for conflict. IEP teams often struggle with the best way to clearly document the provision of services. In addition to generally explaining the sections of the IEP, this article will highlight additional aspects of the IEP including ways to document related services.
The Educational Role of Related Service Providers
Related Service providers are an important part of the educational team for students with disabilities. IDEA defines related services in the following way:

*The term 'related service' means transportation, and such developmental, corrective, and other supportive services... as may be required to assist a student with a disability to benefit from special education, and includes the early identification and assessment of disabling conditions in students.* (emphasis added) (34 §CFR 300.34)

IDEA lists a variety of related services such as speech-language pathology and audiology services, psychological services, physical and occupational therapy, recreation (including therapeutic recreation), social work services, counseling services, including rehabilitation counseling, orientation and mobility services, and medical services (except when such medical services are for diagnostic and evaluation purposes only). While this list is extensive, it is not exhaustive. Individual states sometimes provide specific guidance about their interpretation of IDEA.

Each section of the IEP answers a question. The following charts show each mandated IEP section, its intended question, a definition and examples.

<table>
<thead>
<tr>
<th>IEP SECTION</th>
<th>ANSWERS THE QUESTION...</th>
<th>DEFINITION</th>
<th>EXAMPLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Present Level of Academic Achievement and Functional Performance</td>
<td>What is the student doing now and what is the impact of the disability?</td>
<td>Describes how the student’s disability impacts her/his involvement and progress in the general curriculum.</td>
<td>• Reads at the third-grade level.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Able to finish lunch at the same rate as peers using modified utensils.</td>
</tr>
<tr>
<td>Measurable Annual Goal</td>
<td>What does the student need to learn? What can the student be reasonably expected to learn in a year?</td>
<td>A statement, in each area of need, of what the student can reasonably be expected to learn in a year. Includes conditions and frequency.</td>
<td>• Produce targeted speech sounds.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Use computer to spell words correctly.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Learn information in textbooks</td>
</tr>
<tr>
<td>Short-Term Objectives or Benchmarks</td>
<td>What are the details or markers of how the student will meet goals during the year?</td>
<td>Measurable intermediate steps involved in meeting the annual goal. They are used for a student who takes alternate assessments aligned to alternate achievement standards</td>
<td>• Correctly produce targeted sounds in daily oral reading.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Point to named pictures in one second or less.</td>
</tr>
</tbody>
</table>
## DESCRIBING SERVICES THAT WILL BE PROVIDED

<table>
<thead>
<tr>
<th>IEP SECTION</th>
<th>ANSWERS THE QUESTION...</th>
<th>DEFINITION</th>
<th>EXAMPLES</th>
</tr>
</thead>
</table>
| **Specially Designed Instruction** | In what areas does the student need instruction that is different than what is provided in the general education curriculum in order to make progress on identified goals and objectives? | Adaptation of the content, method or delivery of instruction to address the child’s unique needs that result from the disability. | • Reading instruction  
• Wheelchair basketball  
• Dressing skills  
• Technology use for writing |
| **Related Services** | What services does the student need in order to benefit from specially designed instruction? | Transportation and such developmental, corrective and other supportive services as may be required to assist a student with a disability to benefit from specially designed instruction. | • Physical therapy for trial of new equipment  
• Functional behavior assessment in classroom  
• Augmentative communication assessment |
| **Supplementary Aids/Services; Modifications & Accommodations** | Answers the question: What supports and services does the student need in order to be educated with nondisabled children to the maximum extent appropriate? | Activities and items which are necessary to create an environment that supports the student’s progress in the educational program. | • Communications with parents or community medical providers  
• Text-to-speech software to access content area text.  
• Additional time during exams. |
| **Supports for School Personnel** | What supports will be provided to school staff on behalf of the student? | Activities which help school personnel provide needed IEP instruction and services to the student. | • Inservice to school staff  
• Setting up a method for data collection with a paraprofessional. |
| **Special Factors (34 CFR 300.324 (a)(2)(i)-(v))** | What services or tools might the student need due to any of the following: behavior that impedes learning, limited English Proficiency, blindness or visual impairment, communication needs (including those related to deafness or hearing loss), or need for AT? | These five factors are specifically identified in federal law and must be addressed for each student who has an IEP. This is the only place where AT is specifically mentioned, but AT can be included in special education, related services, or supplementary aids and services. | • Positive behavioral support plan  
• ESL classroom half/day daily  
• Augmentative communication device  
• Sign language interpreter  
• Accessible Educational Materials in the form of digital text read aloud by a device |
| **Statewide and District Wide Assessment Participation** | **How will the student participate in statewide or district wide assessments during this IEP period?** | All accommodations, designated supports, and/or universal tools the team identifies as necessary. **OR:** State why student cannot participate and why alternate assessment selected is appropriate. | • Use text-to-speech to read directions.  
• Use of study carrel to reduce distraction during test. |
| --- | --- | --- | --- |
| **Extended School Year** | **What services does this student need in order to avoid regression or loss of skill?** | **Specially designed instruction and related services that are provided to a student during extended periods such as summer or winter vacation for the purpose of preventing loss of skills and difficulty in relearning.** | • 4 hours of instruction, three days/week for six weeks during the summer to maintain language skill.  
• Support from AAC specialist once a week during classroom instruction throughout summer. |
| **Transition** | **What are appropriate, measurable post-secondary goals for the student?** | **Appropriate, measurable post-secondary goals in education, training, employment and independent living skills based upon age-appropriate transition assessments** | • Get a driver’s license  
• Interview a college’s office of disabled student services  
• Create a budget  
• Explain need for AT to college instructors. |
SECTION 1
DESCRIBING STUDENT PERFORMANCE

Before the team can describe all the instruction and services the child will need, team members must agree on what they want to help the child to accomplish. The sections of the IEP that provide that information about student performance include: Present Level of Academic Achievement and Functional Performance (PLAAFP), Measurable Annual Goals, Short-Term Objectives or Benchmarks (for students who have goals that are not part of the standard curriculum or who participate in alternate assessments). These sections of an IEP should always be completed before the team begins to complete the Services Summary. On the following pages, more complete explanations are provided for each section that describes student performance, followed by a more complete example.

<table>
<thead>
<tr>
<th>IEP SECTIONS</th>
<th>QUESTION TO BE ANSWERED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Present Level of Academic Achievement and Functional Performance</td>
<td>What is the student doing now and what is the impact of the disability on the student’s performance?</td>
</tr>
<tr>
<td>Measurable Annual Goal</td>
<td>What does the student need to learn? What can the student be reasonably expected to learn in a year?</td>
</tr>
<tr>
<td>Short-Term Objectives/Benchmarks</td>
<td>For children with disabilities who take alternate assessments aligned to alternate achievement standards (in addition to the annual goals), what are the details of how the student will progress toward goals during the year?</td>
</tr>
</tbody>
</table>
The PLAAFP describes how the student’s disability impacts her/his involvement and progress in the general curriculum. It answers the question, “What is the student doing now and what is the impact of the disability?”

The statement of the student’s PLAAFP guides the team in developing goals, short-term objectives or benchmarks if needed, as well as identifying related services, and supplementary support needs. In addressing the student’s PLAAFP, the IEP must reflect how the student’s disability affects involvement and progress in the general curriculum, including adaptations or modifications to the curriculum that may be necessary. The fully developed present level statement includes all aspects of the student’s performance that are addressed in the Goals and Objectives sections of the plan including needed adaptations or modifications to curriculum that are being provided.

The student’s performance at the time of the IEP, as well as anticipated changes in that performance (such as a reduction in independence after surgery), are identified in this PLAAFP statement. Important considerations include:

- the strengths of the student;
- the concerns of the parents for enhancing the education of their child;
- the results of the initial or most recent evaluation (including functional and developmental information, as appropriate);
- the results of performance on state or district-wide assessment;
- any AT that was used to achieve the present levels;
- for students age 14 and older, the student’s preferences, needs, interests and post-school outcomes.

The activities of related service providers might be included in the PLAAFP to show the kind of help the student needs in order to perform specific tasks and activities. If the student currently uses AT, a description of that AT and how it is used would be included in the PLAAFP.
NATHAN’S PLAAFP EXAMPLE

Here is an example a PLAAFP statement for Nathan, a student who needs extensive related services for the coming year.

PRESENT LEVELS OF ACADEMIC ACHIEVEMENT AND FUNCTIONAL PERFORMANCE

In developing each student’s IEP, the IEP team must consider (34 CFR 300.324):

Student’s overall strengths, interests, and preferences: 34 CFR 300.324 (a)(1)(i)

- Nathan is very social and has many friends in his classroom. He participates in all classroom activities and extracurricular activities without prompting and expresses a desire to be an integrated class member. He does not like to be removed from class for special instruction or therapy activities.
- Nathan is scheduled to have surgery this winter and will need post-surgery accommodations at school for mobility and access.
- Nathan needs to use a urinary catheter twice a day at school. He is learning to do this for himself but currently needs help.

Input from parent(s) in the areas of academic achievement and functional performance, including concerns for enhancing the education of their child: 34 CFR 300.324(a)(1)(ii)

Nathan’s parents have expressed a concern about his writing and requested an assistive technology assessment for writing.

Present level of academic achievement (i.e. reading, writing, mathematics, etc.), including most recent performance on State or district-wide assessments:

- Strengths of the student
- Needs of the student
- How the student’s disability affects involvement and progress in the general education curriculum 34 CFR 300.320(a)(1); 300.324(a)(iii)

Narrative and supporting data:
- Nathan decodes at a 3.1 grade level as a 4th grade student. He made six months progress last year as measured by the state’s reading exam.
- Nathan can do addition up to 3 digits with no carrying, 2-digit subtraction problems, and multiply whole numbers within 100. He can understand and generate simple equivalent fractions. He has difficulty drawing graphs. His score is at the 40th percentile for his grade.
- Nathan is given extra time to complete written work involving more than one paragraph and sometimes uses the computer.
- He participates in PE with his class, with adaptations for some activities. The physical therapist consults with the PE teacher to help determine safe and appropriate PE modifications.

Present level of functional performance (not limited to, but may include communication, social skills, behavior, organization, fine/gross motor skills, self-care, self-direction, etc.), including the results of initial or most recent formal or informal assessments/observations:

- Strengths of the student
- Needs of the student
- How the student’s disability affects involvement and progress in the general education curriculum 34 CFR 300.320(a)(1)

Narrative and supporting data:
- Nathan can say the “s”, “z”, and “sh” sounds during drill and practice, but does not use them correctly with consistency in his daily language.
- Nathan is independent in his wheelchair on flat areas, but requires assistance to safely negotiate ramps to and from the upper level of the school.
- Nathan does not like a tray on his wheelchair most of the time but sometimes needs a tray if his chair does not fit under a desk or table.
- Nathan is learning to self-catheterize with instruction and supervision from the school nurse and a trained instructional assistant.
MEASURABLE ANNUAL GOALS

Measurable annual goals answer the question, “What does the student need to learn? What can he/she be reasonably expected to learn in a year?” In general, annual goals are statements, written in measurable terms, which describe what the student can reasonably accomplish in a 12-month period. There is a direct link between the goal statements and the student’s PLAAFP. Everyone on the student’s team is responsible to make sure that the student has the best opportunity to accomplish a goal.

Some annual goals may not require the involvement of related service providers. However related service providers need to know what those goals are so they can recognize and support the student’s progress. In some cases, a related services provider may have some responsibilities (along with other team members) to assess, monitor, and even supervise the student’s performance. Finally, related service providers may suggest and monitor goals which the team might decide to include as Specially Designed Instruction. Related service providers who are not licensed by the state’s teacher certification program would not be listed as the Provider for Specially Designed Instruction. For example, in some states a certified educator must always be part of the provision of specially designed instruction. In that case if a student has a goal to learn to use a walker and it is included the IEP as specially designed instruction, a physical therapist would work with certified educators and may have a responsibility to monitor progress. NOTE: If a related service provider is the only person helping the child with a goal, the goal for the student would be described on a goal page and the related service provider’s activity should be listed in the Related Services section of the Services Summary.

The following are examples about Nathan that illustrate each of these instances (not all goal pages of Nathan’s IEP have been included).
NATHAN’S ANNUAL GOAL THAT DOES NOT REQUIRE DIRECT INVOLVEMENT OF RELATED SERVICE PROVIDER

Nathan’s reading goal does not require the direct involvement of related service providers. However, it is important that the related service providers as well as other team members know about this goal and the things Nathan will be expected to learn about reading so that they can collaborate with other team members in helping Nathan to generalize his reading skills. Some speech, occupational therapy, and physical therapy activities might also offer opportunities for Nathan to practice his new reading skills. In addition, the nurse might provide Nathan with written instructions for his self-catheterization. Similar opportunities for generalization can occur for any academic goals (e.g. math), so it is always valuable for the entire team, including related services providers to know the student’s goals.

<table>
<thead>
<tr>
<th>Goal Area:</th>
<th>34 CFR 300.320(a)(2)(i)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Annual Measurable Goal (including conditions and frequency):</strong></td>
<td>Nathan will decode at the 3.7 grade level in oral reading group and in silent reading by decoding daily oral reading assignments while reading 90 words or more per minute with 95% accuracy and respond to comprehension questions with 80% accuracy.</td>
</tr>
<tr>
<td><strong>Objectives (if needed):</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Related Content Standard(s), if applicable:</strong></td>
<td>Read with sufficient accuracy and fluency to support comprehension (rf.3.4)</td>
</tr>
<tr>
<td><strong>How progress will be measured:</strong></td>
<td>Weekly probe data with 80% accuracy on five consecutive passages recorded weekly in teacher grade book and reported using school’s reporting schedule.</td>
</tr>
<tr>
<td><strong>How progress will be reported, including frequency:</strong></td>
<td>34 CFR 300.320(a)(3)(i) Progress reported quarterly using school’s reporting schedule.</td>
</tr>
<tr>
<td><strong>Progress Towards Goal</strong></td>
<td>34 CFR 300.320(a)(3)(ii)</td>
</tr>
<tr>
<td><strong>Date of Progress:</strong></td>
<td><em><strong>/</strong></em>/___</td>
</tr>
</tbody>
</table>
| **Narrative and supporting data:** | }
The physical therapist will be very much involved with teaching Nathan to successfully control his wheelchair. The therapist might work directly with Nathan and the school staff to identify the most effective and safe way for him to control his wheelchair on ramps. The school staff will make sure that Nathan has daily opportunities to practice the skills identified by the physical therapist and will keep daily data. Once the program is established, the physical therapist will observe Nathan once a month to note his progress, make needed changes to the program and teach staff new strategies to help Nathan learn. The *Specially Designed Instruction* will be carried out by the school staff. Physical therapy coordination will be listed as a related service in the *Services Summary* of the IEP.

<table>
<thead>
<tr>
<th>Goal Area:</th>
<th>34 CFR 300.320(a)(2)(i)</th>
</tr>
</thead>
</table>

**Annual Measurable Goal (including conditions and frequency):**
Nathan will successfully control his wheelchair at a walking speed, without leaving the sidewalk edges while moving both up and down campus ramps 100% of opportunities for 6 weeks.

**Objectives (if needed):**
1. Control his wheelchair with adult instruction
2. Control his wheelchair independently with “spotter”
3. Control his wheelchair independently on sidewalks
4. Control his wheelchair independently on sidewalks and ramps.

**Related Content Standard(s), if applicable:**
Not Applicable

**How progress will be measured:**
Daily score card implemented by instructor or “spotter”.

**How progress will be reported, including frequency:** 34 CFR 300.320(a)(3)(ii)
Progress reported quarterly using school’s reporting schedule.

**Progress Towards Goal**

<table>
<thead>
<tr>
<th>Date of Progress: <em><strong>/</strong></em>/___</th>
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</table>

Narrative and supporting data:
NATHAN’S ANNUAL GOAL THAT REQUIRES DIRECT INVOLVEMENT OF RELATED SERVICES

Related service providers might be included when the student needs support to learn a particular skill that is associated with the broader educational goal. The goal typically has academic as well as other components.

In the example below, Nathan’s annual goal is to produce targeted speech sounds in everyday activities. Particular attention will be paid to this goal during oral reading lessons. The teacher and the SLP can easily keep data on Nathan’s performance during this activity which allows for clear demonstration of progress in generalization of Nathan’s new speech skills.

<table>
<thead>
<tr>
<th>Goal Area:</th>
<th>34 CFR 300.320(a)(2)(i)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Measurable Goal (including conditions and frequency):</td>
<td>Nathan will correctly produce targeted speech sounds in the context of oral reading and classroom interactions with peers and teachers during classroom discussions.</td>
</tr>
<tr>
<td>Objectives (if needed):</td>
<td>Not Needed</td>
</tr>
<tr>
<td>Related Content Standard(s), if applicable:</td>
<td>Not Applicable</td>
</tr>
<tr>
<td>How progress will be measured:</td>
<td>90% consistency on “s”, “z”, and “sh” sounds during three consecutive observations.</td>
</tr>
<tr>
<td>How progress will be reported, including frequency:</td>
<td>34 CFR 300.320(a)(3)(i) Weekly observation data recorded by Speech/Language Pathologist. Progress reported quarterly using school’s reporting schedule.</td>
</tr>
<tr>
<td>Progress Towards Goal</td>
<td>34 CFR 300.320(a)(3)(ii)</td>
</tr>
<tr>
<td>Date of Progress:</td>
<td><em><strong>/</strong></em>/___</td>
</tr>
<tr>
<td>Narrative and supporting data:</td>
<td></td>
</tr>
</tbody>
</table>
Short Term Objectives and Benchmarks

Annual goals may include Short-Term Objectives and/or Benchmarks that serve as a measure of progress toward the annual goal for children with disabilities who take alternate assessments aligned to alternate achievement standards (in addition to the annual goals) [34 CFR §300.320(a)(2)(ii)]. Short term objectives may also be developed for goals that are outside of the standard curriculum because more detail may be required in the IEP. All team members, including educators, parents, as well as related services providers need to know how and when progress will be measured. Short term Objective and/or benchmarks answer the question, “What are the details of how the student will make progress toward goals during the year?”

These measurable intermediate steps provide the IEP team, including the parents, with information about how the student is progressing during the year. Related services providers are involved in a short-term objective or benchmark when the student needs their support to learn a skill that is associated with a goal. Generally, support from a related service provider is described as a condition needed for the student to accomplish the short-term objective.

Nathan’s IEP team determined that he needed to learn to catheterize himself at school. The Nurse developed the training protocol for this skill and will closely supervise Nathan for the first month. She will train specific school staff members to help Nathan with this new skill, delegate the training to them, and closely monitor the staff and Nathan on a regular basis. (Clean Intermittent Catheterization [CIC] is a delegated nursing task.) The activities of the nurse will be listed under Related Services in the Services Summary section of the IEP. Specific classroom staff will be identified as the delegated providers of the daily monitoring and instruction for Nathan on this goal. They will collect data on Nathan’s performance each time he practices CIC.

<table>
<thead>
<tr>
<th>Goal Area:</th>
<th>34 CFR 300.320(a)(2)(i)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Annual Measurable Goal (including conditions and frequency):</strong></td>
<td>Nathan will use a protocol for Clean Intermittent Catheterization (CIC) which has been approved by the school nurse. He will correctly implement all steps in the protocol without prompts. (Steps 1-15 complete in a maximum of 30 minutes, 100% of opportunities.)</td>
</tr>
</tbody>
</table>
| **Objectives (if needed):** | 1. Nathan will complete steps 1-8 of the CIC protocol for 3 of 4 days with supervision from the school nurse and no more than 3 verbal corrections
2. Nathan will verbally instruct the school nurse to complete steps 9-15 of the CIC protocol for 3 of 4 days with no more than 3 verbal prompts.
3. Nathan will complete all steps of the CIC protocol with supervision from the health room assistant and no more than three verbal prompts for 3 of 4 days. |
| **Related Content Standard(s), if applicable:** | Not Applicable |
| **How progress will be measured:** | Daily CIC protocol checklist completed - Weekly data review by School Nurse. |
| **How progress will be reported, including frequency:** | 34 CFR 300.320(a)(3)(i) Parents will receive weekly progress reports in the form of the CIC Checklist Data. Overall progress reported quarterly using school’s reporting schedule. |
| **Progress Towards Goal** | 34 CFR 300.320(a)(3)(ii) |
| **Date of Progress:** | ___/___/___ |
| **Narrative and supporting data:** |
SECTION 2
DESCRIBING SERVICES TO BE PROVIDED

In addition to describing the student’s performance, every IEP must describe the services and supports to be provided to the student. The various sections of the IEP tell about the actions the district will take with the student present or, in some cases, on behalf of the student to ensure that the student is able to meet educational goals. Everything in the IEP is important, regardless of where it is listed in the document and the IEP serves as an agreement between the district and the child and family.

On the following pages are examples of these services with an emphasis on how the activities of related service providers might be documented.

SECTIONS OF THE IEP THAT DESCRIBE SERVICES AND QUESTIONS TO BE ANSWERED

<table>
<thead>
<tr>
<th>IEP sections</th>
<th>Question to be answered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specially Designed Instruction</td>
<td>In what areas does the student need specially designed instruction to make progress on goals and objectives in the IEP?</td>
</tr>
<tr>
<td>Related Services</td>
<td>What services does the student need to benefit from specially designed instruction?</td>
</tr>
<tr>
<td>Supplementary Aids /Services</td>
<td>What supports and services does the student need in order to be educated with nondisabled children to the maximum extent appropriate?</td>
</tr>
<tr>
<td>Accommodations &amp; Modifications</td>
<td>What accommodations (adjustments in time, location, tools, etc.) or modifications (changes in criteria or nature of the tasks) does the student need in order to make progress in the curriculum?</td>
</tr>
<tr>
<td>Supports for School Personnel</td>
<td>What supports will be provided to school staff on behalf of the student?</td>
</tr>
<tr>
<td>Participation in State and District-Wide Assessment</td>
<td>How will the student participate in both state and district-wide assessments and what accommodations, modifications, or supports will be needed?</td>
</tr>
<tr>
<td>Consideration of Special Factors</td>
<td>What services or tools might the student need due to behavior that impedes learning, limited English Proficiency, blindness or visual impairment, communication needs including hearing loss, or need for AT?</td>
</tr>
<tr>
<td>Transition</td>
<td>Based upon age-appropriate transition assessments, what are appropriate, measurable post-secondary goals for the student?</td>
</tr>
</tbody>
</table>
SERVICE DESCRIPTORS

For each of the services included, the anticipated amount and frequency, location, start and end date, and provider need to be included. Here are examples of how these might be documented.

Anticipated Amount and Frequency:
- **Answers the question:** “How often and for how long will the service be delivered?”
- **Definition:** A *best minimum estimate* of the amount of time necessary to complete the service. The LEA must provide no less than the amount and frequency listed in the IEP.
- **Description:** It may be necessary to list when, or under what circumstances the service is needed to ensure clarity and accuracy of implementation of the service, (e.g., on written assignments of more than one paragraph). If a service is to be provided in a block of time, for example, when school starts in the fall, or during transition activities in the spring, it may be listed in that manner (e.g. “PT Consultation for physical access, 2 hours, before the beginning of the school year”). It is often difficult to estimate the amount of time an intervention may take. If a service consistently takes longer to perform than estimated on the services summary page, the IEP may be revised with the approval of the IEP team, by phone, if needed.
- **Examples:** 15 minutes daily, after 2:00, during essay tests, 20 minutes per week, 45 minutes/month, 30 minutes quarterly.

Anticipated Location:
- **Answers the question:** “Where will the service take place?”
- **Definition:** The location at which the service will be delivered.
- **Description:** One or more locations may be listed if the service will take place in more than one setting.
- **Examples:** classroom, resource room, cafeteria, therapy room, gym, bus, etc.

Starting and Ending Date:
- **Answers the question:** “When will the service take place?”
- **Definition:** Identifies the exact date the service will be initiated, the duration of the service, and when the service will be completed. The assumption is that the service will start on the same date as the IEP unless otherwise described.
- **Description:** Starting and Ending Dates should reflect the anticipated length of the intervention, even if the service will take less than a full year.
- **Example:** September 6 through May 28

Provider:
- **Answers the question:** “Who will be responsible to assure that the service is provided?”
- **Definition:** The agency providing the service.
- **Description:** While IDEA does not require that the Provider of each service be listed on the IEP, there may be a space available for that purpose. If, to insure clarity, it is necessary to list a specific service provider as Provider, that person’s discipline, not name, should be listed. The Provider column is especially helpful in documenting commitments from an outside agency when an agency other than the Local Educational Agency (LEA) provides a service. If the student is receiving services from a cooperative, collaborative, or intermediate program or district, it should be listed as the provider.
- **Example:** The OT from the Education Service District.
SPECIAL DESIGNED INSTRUCTION

Specially designed instruction is adaptation of the content, method or delivery of instruction to address the unique needs of the child that result from the child’s disability. It answers the question, “In what areas does the student need the instruction to be changed or expanded to make progress on goals and objectives in the IEP?”

When a student needs to be taught a new skill or taught in a way that is not offered in the general curriculum, the time that will be spent teaching that skill is listed as Specially Designed Instruction (SDI). SDI must be provided by, or under the supervision of, qualified teachers. (In some states, Speech Language Pathologists and Orientation and Mobility Instructors are considered Qualified Teachers). A related service provider may also provide training to the staff or to a therapy assistant to help them teach new skills. When primary instruction on a goal will be provided by school staff with coordination or consultation from the related service provider, the instruction is listed under SDI, with the school staff listed as the Provider. The related service provider’s consultation would be listed under Related Services, Supplementary Aids and Services, or Supports for School Personnel as appropriate.

NATHAN’S SPECIALLY DESIGNED INSTRUCTION EXAMPLE

<table>
<thead>
<tr>
<th>Specially Designed Instruction</th>
<th>Anticipated Amount &amp; Frequency</th>
<th>Anticipated Location</th>
<th>Starting Date</th>
<th>Ending Date</th>
<th>Provider</th>
<th>Role Responsible for Monitoring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oral Language</td>
<td>20 min. week</td>
<td>Gen Ed Classroom</td>
<td>9/15/18</td>
<td>9/15/19</td>
<td>ESD SLP</td>
<td></td>
</tr>
<tr>
<td>Reading</td>
<td>40 min. daily</td>
<td>Resource Room</td>
<td>9/15/18</td>
<td>9/15/19</td>
<td>LEA Classroom Staff</td>
<td></td>
</tr>
<tr>
<td>Math</td>
<td>30 min. daily</td>
<td>Resource Room</td>
<td>9/15/18</td>
<td>9/15/19</td>
<td>LEA Classroom Staff</td>
<td></td>
</tr>
<tr>
<td>Independent Mobility</td>
<td>4 times daily</td>
<td>To/From Cafeteria</td>
<td></td>
<td></td>
<td>LEA Classroom Staff</td>
<td>PT</td>
</tr>
<tr>
<td>Self-Catheterization</td>
<td>2 times daily</td>
<td>Health Room Bathroom</td>
<td></td>
<td></td>
<td>LEA Nurse initially, then Classroom Staff</td>
<td>LEA Nurse to monitor classroom staff</td>
</tr>
</tbody>
</table>
RELATED SERVICE

Related services include transportation, and such developmental, corrective, and other supportive services...as may be required to assist a student with a disability to benefit from special education, and includes the early identification and assessment of disabling conditions in students. Related service answers the question, “What services does the student need to benefit from specially designed instruction?”

Occupational therapists, physical therapists, speech-language pathologists and nurses are all listed in IDEA as related service providers. (In some states, Speech Language Pathologists and Orientation and Mobility Specialists are related service providers and in other states they are considered qualified teachers). Related services include activities such as direct service, ongoing assessment, trial of equipment, regular observation, development of recommendations for implementing the student’s plan, etc. The Related Service section of the IEP documents the related service provider’s time only. While the student may or may not be present during the delivery of a related service, the service must be related to a specific goal or goals in the student’s IEP. If consultation is the method of delivery, the IEP should indicate to whom the consultation will be provided and for what activity. If more than one strategy for delivery of related service is used, they may be listed separately within the Related Service section. If necessary, additional page(s) may be added to the IEP to include more detail. The additional page(s) must include all criteria included on the cover sheet, (i.e. amount, frequency, etc.).

NATHAN’S RELATED SERVICE EXAMPLE

In this example, Nathan will learn to do self-catheterization. The school nurse will instruct him in this new skill daily from September 15 to November 15. After this time, the team anticipates that the student will know all the steps to self-catheterization. If primary instruction on a collaborative goal will be provided by someone other than the related service provider, (e.g. school staff, with consultation from the related service provider), the instruction should be listed under Specially Designed Instruction. The related service provider’s activities would be listed under Related Service. In this example, the nurse will work directly with the student for 30 minutes daily for one month. After that she will delegate the nursing task to trained classroom staff and monitor the program twice a month.

The occupational therapist will provide consultation to the classroom staff to make sure that Nathan’s computer-use program is working well. The physical therapist will come to the school to monitor Nathan’s progress in wheelchair mobility. When she is there, she will check his equipment and make sure that everything is working well and that Nathan is making progress.

<table>
<thead>
<tr>
<th>Related Services 34 CFR 300.34</th>
<th>Anticipated Amount &amp; Frequency</th>
<th>Anticipated Location</th>
<th>Starting Date</th>
<th>Ending Date</th>
<th>Provider</th>
<th>Role Responsible for Monitoring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-Catheterization Instruction</td>
<td>30 min. daily</td>
<td>Health Room Bathroom</td>
<td>9/15/18</td>
<td>10/15/18</td>
<td>LE Nurse</td>
<td></td>
</tr>
<tr>
<td>Monitor Delegated Catheterization Training</td>
<td>30 min/2 X month</td>
<td>Health Room Bathroom</td>
<td>10/15/18</td>
<td>9/15/19</td>
<td>LEA Nurse</td>
<td></td>
</tr>
<tr>
<td>PT Coordination for Independent Mobility</td>
<td>30 min. month</td>
<td>School Campus</td>
<td>9/15/18</td>
<td>9/15/19</td>
<td>ESD PT</td>
<td></td>
</tr>
<tr>
<td>OT Consultation to classroom for Writing</td>
<td>15 min/2 X month</td>
<td>Gen Ed Classroom</td>
<td></td>
<td></td>
<td>ESD OT</td>
<td></td>
</tr>
</tbody>
</table>
SUPPLEMENTARY AIDS AND SERVICES

The term *Supplementary Aids and Services* means, aids, services, and other supports that are provided in regular education classes or other education-related settings, and in extracurricular and non-academic settings, to enable students with disabilities to be educated with nondisabled students to the maximum extent appropriate.” (34 CFR 300.320(a)(4)(i)-(iii)) The student may or may not be present during the delivery of supplementary aids and services. Examples may include activities such as preparation of individualized materials, research of resources, etc. The section answers the question, “What supports and services does the student need in order to be educated with nondisabled children as much as possible?”

In documenting *Supplementary Aids and Services*, the amount and frequency may be more descriptive than specific. Related service providers can: (a) List a best estimate of the amount of time necessary to complete the service, **OR** (b) List when the service is needed (e.g., after 2:00, during essay tests, etc.). Anticipated starting and ending dates should also be listed to identify when the service will take place (throughout the school year, over the course of a month or semester, etc.). It is often difficult to estimate the length of time a supplementary aid or service may take. If a service consistently takes longer to perform than estimated on the Services Summary page (e.g., materials fabrication), the IEP may be revised to be more accurate with the approval of the IEP team. In some states that revision can be done by phone, if needed.

**NATHAN’S SUPPLEMENTARY AIDS AND SERVICES EXAMPLE**

<table>
<thead>
<tr>
<th>Supplementary Aids and Services 34 CFR 300.320(a)(4)(i)-(iii)</th>
<th>Anticipated Amount &amp; Frequency</th>
<th>Anticipated Location</th>
<th>Starting Date</th>
<th>Ending Date</th>
<th>Provider</th>
<th>Role Responsible for Monitoring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fabrication of tray for wheelchair to hold items closer as needed when his chair won’t fit under a table</td>
<td>Two 30 minute sessions</td>
<td>Education Service District Shop</td>
<td></td>
<td></td>
<td>ESD OT</td>
<td></td>
</tr>
<tr>
<td>Computer for written assignments</td>
<td>All writing &gt; 2 sentences</td>
<td>Gen Ed Classroom</td>
<td></td>
<td></td>
<td>LEA</td>
<td></td>
</tr>
</tbody>
</table>
ACCOMMODATIONS & MODIFICATIONS

While IDEA does not define accommodations or modifications, the generally agreed upon definitions are:

Accommodation: A change that allows a student to complete the same assignment or test as other students, but with a change in the timing, formatting, setting, scheduling, response mode and/or presentation. An accommodation does not alter what a test or assignment measures.

Modification: An adjustment to an assignment, activity, or test that changes the standard or what the test or assignment is designed to measure.

The use of accommodations and modifications answers the question: “What adaptations does the student need in order to complete necessary tasks and participate in common activities?”

Accommodations and modifications can be part of specially designed instruction, related services, and/or supplementary aids and services and should be documented in the IEP. They are often used in district and state testing. When they are used for that purpose, they must first have been used in the classroom prior to being used for a test. Accommodations may be needed in any aspect of the services that are going to be provided to the student. Accommodations involve changes in the timing, formatting, setting, scheduling, response mode and/or presentation. An accommodation does not alter what is being measured, (e.g. use of adapted seating or tables, extra time given for transitions). A modification on the other hand is an adjustment to an assignment, activity, or test that changes the standard or what the test or assignment is supposed to measure (e.g., completing only ½ of the math assignment given to other students, using text-to-speech during a reading comprehension test). In some states Accommodations and modifications are included in a separate section of the IEP.

NATHAN’S ACCOMMODATIONS AND MODIFICATIONS EXAMPLE

<table>
<thead>
<tr>
<th>Accommodations</th>
<th>Anticipated Amount &amp; Frequency</th>
<th>Anticipated Location</th>
<th>Starting Date</th>
<th>Ending Date</th>
<th>Provider</th>
<th>Role Responsible for Monitoring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extra Time for Written Work</td>
<td>All writing &gt; 1 paragraph</td>
<td>Gen Ed Classroom</td>
<td></td>
<td></td>
<td>LEA Classroom staff</td>
<td></td>
</tr>
<tr>
<td>Inverted graph paper for math assignments</td>
<td>All written math assignments</td>
<td>Gen Ed Classroom</td>
<td></td>
<td></td>
<td>LEA Classroom staff</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Modifications</th>
<th>Anticipated Amount &amp; Frequency</th>
<th>Anticipated Location</th>
<th>Starting Date</th>
<th>Ending Date</th>
<th>Provider</th>
<th>Role Responsible for Monitoring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete only ½ of math assignments given to class</td>
<td>All Math assignments</td>
<td>Gen Ed Classroom</td>
<td></td>
<td></td>
<td>LEA Classroom staff</td>
<td></td>
</tr>
</tbody>
</table>
SUPPORTS FOR SCHOOL PERSONNEL

Supports for school personnel are activities which help people who work with a student to provide needed services. This section answers the question, “What supports will be provided to school staff on behalf of the student?”

Help from related service providers is often needed to assist and support school staff in their work with a student. Supports to School Personnel may be a one-time event, a series of events, or ongoing throughout the school year. The student may or may not be present when Supports to School Personnel are delivered. It is important to record to whom the support will be delivered. Examples may include activities such as in-service training to classroom staff, communicating with outside medical providers, attending meetings about the student, etc.

NATHAN’S SUPPORTS FOR SCHOOL PERSONNEL EXAMPLE

Nathan will be learning to control his wheelchair and will also be participating in physical education classes that have been modified so that he can participate. The physical therapist will provide one-time training sessions twice each year to the Adaptive PE teacher to discuss the wheelchair’s operation and Nathan’s physical limitations. The school nurse will teach the cafeteria staff about Nathan’s particular dietary needs. These services are listed in the Supports for School Personnel section of the Services summary page. (Note that this service could also be listed under Related Services if the consultation is related to a student goal.)

<table>
<thead>
<tr>
<th>Supports for School Personnel</th>
<th>Anticipated Amount &amp; Frequency</th>
<th>Anticipated Location</th>
<th>Starting Date</th>
<th>Ending Date</th>
<th>Provider</th>
<th>Role Responsible for Monitoring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training to Kitchen Staff for diet preparation</td>
<td>One time in September</td>
<td>Cafeteria</td>
<td>September 2018</td>
<td>September 2018</td>
<td>LEA Nurse</td>
<td></td>
</tr>
<tr>
<td>PT consult with PE Teacher for adaptations</td>
<td>30 min/2X year during PE class</td>
<td>Gym</td>
<td>9/15/18</td>
<td>9/15/19</td>
<td>ESD PT</td>
<td></td>
</tr>
</tbody>
</table>
PARTICIPATION IN STATE AND DISTRICT WIDE ASSESSMENT

All students, including those with disabilities are included in the educational accountability system used by the state. Some students with disabilities will participate in the same way as other students; taking regular state or district-wide tests with no accommodations. Other students with disabilities will participate in these assessments using accommodations to enable them to demonstrate their skills without the interference of their disabilities. Most students with disabilities could participate in these ways.

Accommodations that will be used during assessment must be documented in the IEP. Accommodations may include changes in presentation, timing, setting, scheduling, and response. Any accommodations used during testing should mirror those used during instruction. It is critical that students have routine experience with any accommodations such as an accessibility feature on a computer-based assessment so that the student becomes familiar with its use and is able to independently use it. Accommodations acceptable for use during assessment vary from state to state. Check the State Department of Education’s website for allowable testing accommodations.

NATHAN’S PARTICIPATION IN ASSESSMENT EXAMPLE

<table>
<thead>
<tr>
<th>State and District Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>The student will participate in the following state assessment(s) during this IEP year:</td>
</tr>
<tr>
<td>☐ Regular State Assessment</td>
</tr>
<tr>
<td>☒ Regular State Assessment with Accommodations: Extra time for writing assignment. In a separate room with proctor.</td>
</tr>
<tr>
<td>☐ Alternate Assessment (requires benchmarks/objectives)</td>
</tr>
<tr>
<td>☐ Other:</td>
</tr>
</tbody>
</table>

District wide Assessment – The student will participate in the following district wide assessment(s) this school year:

None this year

Accommodations – List any individual accommodations in the administration of the state or district wide assessments that are necessary for the student to participate:

Extra time for written assignments. Keyboard placed on his wheelchair tray.

Nathan will use the same computer systems as is used by all other students in his grade level

If the student: (a) will not participate in the regular state assessment (with or without accommodations) or (b) is unable to participate in a regular districtwide assessment, explain why the student cannot participate in the regular assessment and why the selected assessment option is appropriate:
EXTENDED SCHOOL YEAR

If special education or related service are needed during the summer (or other long vacation periods), those services are included in the IEP and will be provided through extended school year (ESY). ESY is not the same as summer school. It offers the specially designed instruction and related services that the student needs in order to avoid regression or loss of progress toward meeting educational goals. Not every special education student needs ESY. Each IEP team determines if ESY is necessary for a student. They may ask if there is a history of regression or struggling to relearn critical skills. The determination of need for ESY is made each year by the IEP team. Receiving ESY one year does not mean that a student will be determined to need it another year.

While the main focus of the decision about ESY may be regression, IEP teams must consider other relevant factors such as the student’s age, the severity of the disability and the student’s history of recoupment. The team’s decision must be based on data about the student’s past progress and anticipated time required to regain any skills that might be lost. The content of the child’s ESY program must be determined on an individual basis, including the number of weeks, days, and hours of service per day that the student will receive. The ESY program is designed to maintain the student’s mastery of critical skills represented in the IEP and achieved during the regular school year and to maintain a reasonable readiness to begin the next year. The services provided to the student as part of an ESY program are generally not focused upon learning new skills or "catching up" to grade level, but rather to provide practice to maintain previously acquired or learned skills. ESY services may be delivered at home, in the school, in the community or some combination of those sites based on the student’s needs. Related services may be provided alone or in tandem with specially designed instruction.

Although Nathan’s team decided that he did not need extended school year services, they documented their decision and the rationale for it in the IEP. Nathan’s Extended School Year form can be seen on the following page.
**NATHAN’S EXTENDED SCHOOL YEAR EXAMPLE**

**EXTENDED SCHOOL YEAR (ESY) SERVICES**  
34 CFR 300.106; OAR 581-015-2065

**Criteria/Inquiry:**
Does the student experience regression on his/her IEP goals and objectives?

- [ ] Yes  
- [x] No  
- [ ] More information needed

**Explanation:**
Last year Nathan actually gained reading skills over the summer because he practiced with his grandmother every day.

Does the student experience a prolonged recoupment period of time to relearn previously learned skills?

- [ ] Yes  
- [x] No  
- [ ] More information needed

**Explanation:**
Other factors considered by the team:
Nathan will be staying with his grandmother over the summer in another state.

**Decision:**
Does the student require ESY services? No

<table>
<thead>
<tr>
<th>Related Services 34 CFR 300.34</th>
<th>Anticipated Amount &amp; Frequency</th>
<th>Anticipated Location</th>
<th>Starting Date</th>
<th>Ending Date</th>
<th>Provider</th>
<th>Role Responsible for Monitoring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specially Designed Instruction 34 CFR 300.39</td>
<td>Anticipated Amount &amp; Frequency</td>
<td>Anticipated Location</td>
<td>Starting Date</td>
<td>Ending Date</td>
<td>Provider</td>
<td>Role Responsible for Monitoring</td>
</tr>
</tbody>
</table>

- [ ] Yes (described below, including goals to be addressed)  
- [x] No  
- [ ] To be determined by _______________________

Bowser, G. & Reed, P. (2019)
SPECIAL FACTORS

The Individuals with Disabilities Education Act (IDEA) lists *five special factors that the IEP team must consider in the development, review, and revision of each child’s IEP*. The special factors are:

- **Behavior** - The IEP team must consider whether or not the child has a behavior problem that impedes the child’s learning or the learning of others. If it is decided that he does, then a plan to address the behavior must be developed including the use of positive behavioral interventions and supports.

- **Limited English proficiency** - The IEP team must determine whether language is an issue for a student with limited English proficiency and if so, decide how that will be addressed, including whether special education and related services need to be provided in the student’s native language.

- **Blindness or visual impairment** - If the child is blind or has a visual impairment, the IEP team must decide whether instruction in Braille is needed.

- **Communication need** - The IEP team must consider the communication needs of the child, and in the case of a child who is deaf or hard of hearing, consider the child’s language and communication needs. This includes opportunities for direct communication with peers and professional personnel in the child’s language and communication mode, academic level, and full range of needs, including opportunities for direct instruction in the child’s language and communication mode.

- **Assistive technology** - The IEP team must determine if the student needs assistive technology (AT) devices or services.

The IEP team must consider if any of these factors are relevant for the student and if so, address that factor in the IEP. They must discuss what services or tools the student might need due to any of the factors. The need for AT must be considered for every student with an IEP.

While IDEA lists these five special factors, some states have added other factors. Areas that have been added by different states to be part of Special Factors consideration include need for Specially Designed Physical Education, need for Accessible Educational Materials (AEM), need for Transportation and need for a Special Health Care Plan.
When Nathan’s IEP team considered the list of special factors, they determined that he did not have behavior problems that impeded his learning. He is a native English speaker. He does not have a visual impairment or a communication need. However, he did have assistive technology needs. Since IDEA defines AT as any item, piece of equipment, or product system, whether acquired commercially off the shelf, modified, or customized, that is used to increase, maintain, or improve the functional capabilities of a child with a disability, they knew that his use of a wheelchair for independent mobility was AT. They talked about his need for AT services which included PT assessment and monitoring for his wheelchair use. The wheelchair use and access to a computer had been included in previous IEPs. The parents report that he likes using a computer and he feels that it helps with his ability to compose text. But the consensus was that he was still not able to show everything he knows in his written work. The team developed a plan to complete an AT assessment starting with increased access to a classroom computer for more of his written work and a scheduled time with the OT to determine whether additional AT supports for writing such as graphic organizers, word prediction or speech recognition might be beneficial.

### NATHAN’S SPECIAL FACTORS EXAMPLE

A. Does the student exhibit behavior that impedes his/her learning or the learning of others?  
   34 CFR 300.324(a)(2)(i)
   _____ YES  
   ____X NO

   If YES, the IEP addresses the use of positive behavioral interventions and supports, and other strategies, to address that behavior(s).

B. Does the student have limited English Proficiency?  
   34 CFR 300.324(a)(2)(ii)
   _____ YES    English Language Proficiency Level____________  
   ____X__ NO

   If YES, the IEP team must consider the language needs of the student as those needs relate to the student’s IEP.

C. Is the student blind or visual impaired?  
   34 CFR 300.324(a)(2)(iii)
   _____ YES  
   ____X__ NO

   If YES, Braille needs are addressed in the IEP, or an evaluation of reading/writing needs is completed and a determination is made that Braille is not appropriate.

D. Does the student have communication needs or is the student deaf or hard of hearing?  
   34 CFR 300.324(a)(2)(iv)
   _____ YES  
   ____X__ NO

   If YES, the IEP addresses communication supports, services, and/or instruction.

E. Does the student need assistive technology devices or services?  
   34 CFR 300.324(a)(2)(v)
   ____X__ YES  
   _____NO

   Continued use of Wheelchair, continued use of classroom computer, AT assessment to determine whether additional supports are needed for writing
1. Need for Additional Information:
During some IEP meetings, a team member identifies a possible need about which there is not enough available information to make a decision. When this happens, the team should initiate an assessment by completing the Prior Notice and Consent for Evaluation form. If an assessment is needed, the team should develop the IEP using existing information and initiate an assessment. Once an assessment is initiated (i.e. when the parent signs the permission to evaluate), the agency has a specific number of days to complete it. The number of days varies from state to state. Check with the state department of education to find out the exact requirement in your state. For example, if the purpose of the assessment is to decide whether an assistive technology device works for a student, then the team has the specified number of days to complete that assessment.

2. IEP meeting notes
Notes about the IEP meeting are not a required component. However, they can be an acceptable addition and can be used to document key points of agreement and/or areas of disagreement, unless specifically disallowed by the state regulations or district policy. IEP meeting notes should be a summary of what was discussed.

3. Section 504 Plans: Documenting Services to a student who needs related services, but does not need specially designed instruction
- **Answers the question:** “What supports will the student need to have access to the general curriculum and other school activities?”
- **Definition:** The student does not need individually designed instruction, and the student has some condition which is considered to be a disability because it adversely impacts a major life function at school, such as walking, learning, or breathing.
- **Description:**
  There is no standard 504 Plan form. Each local education agency develops its own set of forms for recording the accommodations needed by a student who is eligible for services under Section 504. Many of the ideas and concepts included in this document may also be applied to the writing of 504 Plans. Students who have 504 Plans may require related services in order to gain access to the general education curriculum.
- **Example:** A student is paralyzed from the waist down and has full use of his hands. The student is in high school and has completed his physical education requirement. He is able to complete a full academic program. (The student does not require special education.) The student receives special transportation to attend school. As a part of the plan, the school arranges for a physical therapist to visit the school each time his class schedule changes to make sure that he has full access to the school building. (The student needs accommodations under Section 504.)


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Penny Reed, Ph.D., 1happypenny@gmail.com