California Individualized Education Program (IEP) Expert Panel Report

Prepared for

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INTRODUCTION

Pursuant to the 2022 Budget Act, the California Collaborative for Educational Excellence (CCEE) in consultation with and subject to the approval of the Executive Director of the State Board of Education (SBE) was charged with convening an IEP Expert Panel (hereafter, "Panel"). The legislation reads:

"funds shall be available on a one-time basis for the California Collaborative for Educational Excellence to convene a panel, comprised of members selected in consultation with and subject to the approval of the Executive Director of the State Board of Education, to continue refining the Individualized Education Program template designed by the workgroup authorized in Chapter 6 of the Statutes of 2020 for usability. On or before June 30, 2024, the California Collaborative for Educational Excellence shall provide the Chairpersons of the relevant policy committees and budget subcommittees of the Legislature, the Executive Director of the State Board of Education or the Executive Director's designee, and the Director of Finance with an update on the development of a state standardized Individualized Education Program template."

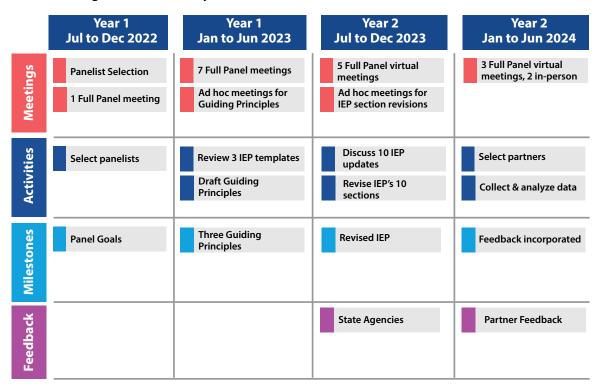
For the Expert Panel, CCEE engaged RTI International¹ to document the Panel process and complete the final report per the legislative charge. This report includes a summary of Panel's processes, the Panel-proposed statewide Individualized Education Program (IEP) template, the Expert Panel's recommendations, and a listing of Panel members (**Appendix A**).

¹ Trade name for Research Triangle Institute.

YEAR 1 IEP EXPERT PANEL PROCESS

The full Panel met 18 times during the 2-year project, with subgroup meetings during development of the Panel's Principles in Year 1 and IEP template section revisions in Year 2. Meetings were conducted both in person and virtually. Facilitators gathered input on agenda and action items through group discussion. Meetings included whole-group discussions, small-group discussions in response to a specific prompt or discussion item (conducted in breakout rooms during virtual meetings), and brainstorming of next steps. RTI staff attended Panel meetings and a sample of small-group meetings to observe and document the process.

Over the 2 years, the Panel developed guiding principles for the IEP template, reviewed and analyzed IEP templates from other states and current IEP forms being used in California, refined the template developed by the previous statewide Workgroup², and responded to feedback from state agencies and education partners to refine the proposed statewide IEP template. **Exhibit 1** organizes the Panel's work into meetings, activities, decisions, and IEP template feedback.



Exhbit 1. Organization and Major Milestones of the Panel's work

² Doutre, S. (2021). California Statewide Individualized Education Program (IEP) Workgroup Report. <u>https://www.scoe.net/media/</u>ankhexys/ca_iep_workgroup_report.pdf

As the Panel started its work in fall 2022, it confirmed its charge was to refine the IEP template created by the previous Workgroup. As such, in Year 1, the Panel reviewed the prior Workgroup's template and IEP templates from other states.

In the second half of Year 1, the Panel developed and agreed on common aspirations for an IEP template to guide their individual and collective work. An initial discussion led to the Panel establishing eight important values:

- 1. The IEP is student-centered and family-oriented, as evidenced by
 - prioritizing identification and discussion of students' strengths and assets; and
 - creating opportunities to communicate a vision for the student, paired with clear strategies and supports for progress and success.
- **2.** The IEP encourages equity of voice and honors each IEP team member as a valued expert.
- **3.** The IEP uses plain language, is succinct, and has a logical flow to help all team members—especially students and families—understand what will be discussed and why.
- **4.** The IEP contains information necessary for successful and consistent implementation (by teachers, service providers, etc.).
- 5. The IEP prioritizes clarity and portability over compliance in its design.
- **6.** The IEP anticipates and explicitly plans for critical transitions.
- **7.** The IEP contains information to ground team members in a common understanding of critical concepts (e.g., least restrictive environment and prioritization of inclusive practices, extended school year).
- 8. The IEP meets federal and state legal requirements.

The Panel used these values to assess California's Special Education Local Plan Agencies (SELPA) IEP template, prior Workgroup template and additional states current template (New York and Massachusetts).

The IEP Panel's charge was to refine the IEP template developed by the previous workgroup for usability.

IEP EXPERT PANEL'S GUIDING PRINCIPLES

Toward the end of Year 1, the Panel agreed on condensing the eight core values into three guiding principles for any revisions of the IEP template. The principles are that the California IEPs will be (1) collaboration aligned and team oriented; (2) student-centered and empowered, inclusive oriented; and (3) outcomes-driven. **Exhibit 2** shows the three principles with their descriptions.

Through the use of	the statewide IEP template, California IEPs will be:
Collaborative and team-oriented	 Provide a framework for facilitating meaningful and accessible IEP meetings and processes in support of student success and well-being.
	 Utilize plain and accessible language; logical and purposeful flow; support meaningful outcomes rather than compliance
	 Promote IEP team collaboration and equitable participation including students, parent/guardians/families, guardians, teachers, and specialists
Student-centered, assets-based,	 Affirm and incorporate students' assets, interests, agency, and engagement in addition to appropriately addressing challenges, needs, and concerns
inclusion-oriented	 Support student success and teacher effectiveness through inclusive practices and standards aligned instruction
Outcomes-driven	 Ensure that students will develop knowledge and skills to prepare them effectively for postsecondary opportunities, career training options, and healthy, productive lives.
	 Serve as a valuable tool to support student outcomes through inclusive practices and standards-aligned instruction
	 Leverage appropriate student supports and specialized expertise
	 Encourage and support planning for the future and beyond the classroom including substantive attention to key transitions
	 Meet federal and state legal and data requirements in ways that supplement rather than supplant the broader intentions of student success and well-being

The Panel agreements, guiding principles, and review of IEP templates laid the foundation for revising the previous Workgroup's IEP template in Year 2.

YEAR 2 IEP EXPERT PANEL PROCESS

Year 2 consisted of refining the previous IEP Workgroup template, gathering feedback from partners around the state, drafting a final IEP template, and identifying recommendations for next steps. The Panel divided into small groups to work on the 10 sections of the IEP template and then presented revisions to the full Panel. The facilitators converted the Panel's revised draft into a digital template to incorporate design elements better illustrating the intention of each section. CCEE facilitators shared the draft digital version with state agency partners for review which included incorporating their recommended changes in a revised template.

In March and April, 2024, the Panel identified education partners for focus groups. CCEE facilitators emailed specific education partners with an overview of the Panel's charge and to determine partners' willingness and availability to provide feedback on the template. Upon confirmation, CCEE provided RTI with a list of specific names and contact information of partners and organizations that should be invited to provide feedback on the template. RTI developed a pre-focus group questionnaire and a focus group protocol (with questions about the Panel's guiding principles and each of the IEP template's 10 sections). CCEE reviewed the protocols and provided feedback, which RTI used to finalize the documents.

Partners who participated in both the questionnaire and focus groups identified themselves as affiliated with the following organizations:

- Advisory Commission on Special Education (ACSE)
- California Alliance of Child and Family Services
- California State Parent Teacher Association (State PTA)
- California Teachers Association (CTA)
- CAL-TASH
- Family Engagement Commission (FEC)
- Special Education Local Plan Areas (SELPAs)
- Special Education Administrators of County Offices (SEACO)
- State SELPA Administrators Association
- Supporting Inclusive Practices (SIP)
- Unified Teachers Los Angeles (UTLA)

RTI held four virtual focus group sessions lasting 90 minutes and two additional sessions lasting 45 minutes. Eight questionnaires were returned representing a conservative estimate of feedback received from at least 10 additional people in their organizations. With 15 individuals attending and participating in focus groups and receipt of pre-session feedback from at least 10 other individuals from their organizations, a conservative estimate of 25 total partners provided input or feedback. This estimate is highly conservative because some partners represented organizations who shared their organization's collective feedback with the research team.

Feedback addressed (1) how the IEP template reflected the Panel's guiding principles, (2) suggestions for revisions to IEP template language or organization, and (3) longer-term recommendations about IEP template design, usability testing, and training.

Partner feedback on the three guiding principles confirmed that the revised IEP template draft aligned to the principles. Partners expressed appreciation for the development of the template and the opportunity to provide feedback to strengthen it. The primary recommendations that emerged from the focus groups were about next steps to implement the template, including accessibility and training. The Panel reviewed these recommendations along with recommendations from the previous Workgroup. I know [revising the IEP template] is a lot of work and a lot of time, I can feel the time and the thought and the labor intensiveness...of developing this and appreciate it.

-Partner providing feedback on the draft IEP template

It's not just a new template-it's kind of a new process, ...to promote agency for whoever this IEP is for and whatever age they are at this time, I think it supports the individual to advocate for themselves from the beginning."

-Partner providing feedback on the draft IEP template

THE CALIFORNIA IEP TEMPLATE

Throughout the process, there were 17 revisions of the draft IEP template. This final draft (**Exhibit 3**) is version 17. Also see **Appendix B** for California's IEP Administrative Data Sheet, used to collect and input necessary state and federal reporting data. **Appendix C** shows the CALPADS crosswalk indicating that this template satisfies all necessary reporting requirements for the state of California.

Exhibit 3. Final Draft IEP Template

California's Individualized Education Program Template
Student's Name IEP Meeting Date Birth Date Current Grade Level
1. STUDENT STRENGTHS, INTERESTS, PREFERENCES & NEEDS
In completing these sections, include information from a variety of sources, such as input from the student and parent/guardian/family, as well as other team members including educators, school staff, and other service providers. Input from the previous year teacher(s), service providers, evaluators, and/or IEP team should be referenced to develop each section. The sentence starters provided are examples and are not intended to limit the scope of input. STUDENT STRENGTHS - What are the student's strengths (both in and out of school)?
*My strengths are I am good at Things I like about myself are
"The student's strengths are The student is good at
STUDENT INTERESTS - What does the student enjoy doing or thinking about? What motivates the student?
*I am interested in and like to I enjoy spending my time I like to go to
"The student has expressed interest in I have noticed the student likes
STUDENT PREFERENCES - How does the student prefer to learn (e.g., watching, doing, listening)? How does the student prefer to communicate and show what they know?
*I learn by I prefer to show what I know by
"The student prefers to learn by The student is best able to show what they know by/when
CONCERNS AND PRIORITIES - This section is intended to help the IEP team focus its discussion on the student's concerns, needs and priorities of the student and their parent/guardian/families.
Note student and/or parent(s)/guardian(s)/family's concerns or topics related to the student's educational progress that this IEP should address.

2. VISION STATEMENT

"This year, I want to ... Some hopes I have for the future include...

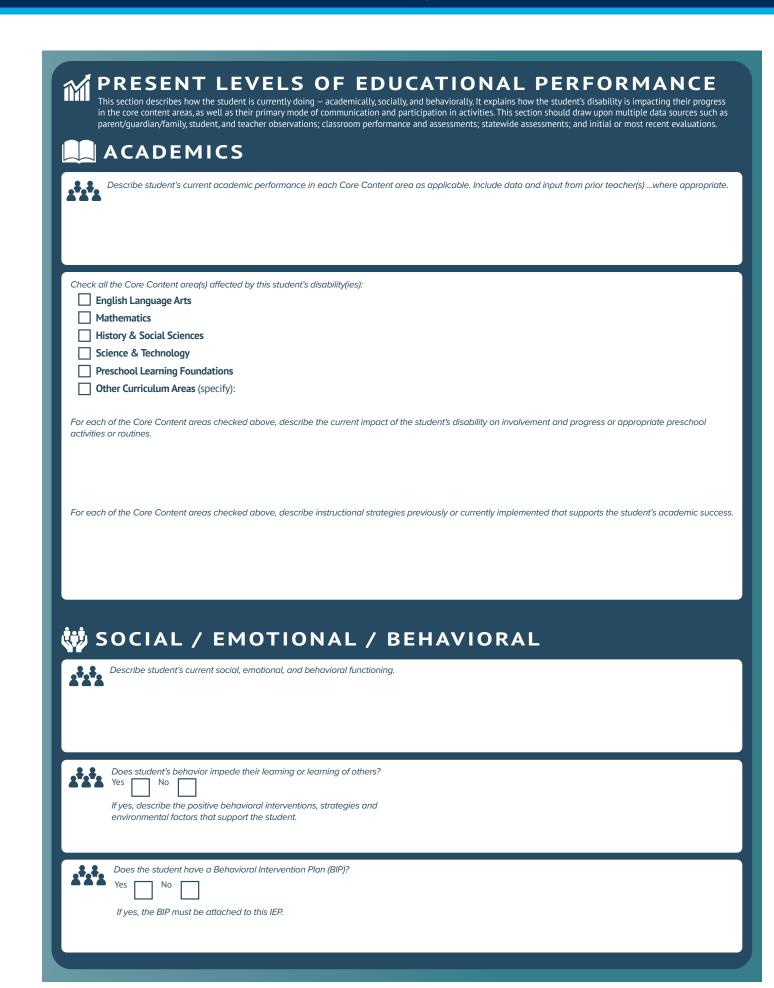
2

In general, a vision statement refers to a short and aspirational statement that represents high expectations for the student. The sentence starters provided are examples and are not intended to limit the scope of input.

"This year, we want the student to... Some hopes we have for the future include...

	as challenges, is important to develop a purposeful IEP that supports educational nt will be documented and specific needs will be discussed. Current achievement
Primary Disability	Secondary Disability
Student's Primary Language Other Languages Spoken	Yes No No
To ensure that English Learners receive comprehensive English Lang	he student is an English Learner guage Development (ELD) as part of their instructional program, the IEP team with linguistically appropriate support to ensure academic success. For students t as those needs relate to this IEP.
Integrated English Language Development (ELD) Supports If the student needs primary language support during integrated ELD across content areas, describe the support to be provided:	Designated ELD will be provided in the (check one): General Education Classroom Special Education Classroom Other
Is the student currently participating in these programs (check all that apply): Structured English Immersion (SEI) Program Other, parent/guardian/family selected multilingual/language acquisition program None	Designated English Language Development Describe how designated ELD instruction will be provided:

STUDENT LEARNING NEEDS AND STRATEGIES
How does the student's disability affect their learning and development? [This can be drawn, in part, from the summary of the student's recent assessment report(s)].
When and how does the student need support to communicate, learn, and demonstrate what they know? What environmental factors need to be considered in the development of this IEP for the student to be meaningfully engaged in their learning? [This can include recommendations from the psychoeducational report augmented or amended by more recent insights.]
What strategies have been used to successfully support this student?
BLINDNESS & VISUAL SUPPORT NEEDS
Is the student blind or do they need visual support? Yes No No If no, provide a justification: Describe any additional support needs:
DEAF & HARD OF HEARING SUPPORT NEEDS
Is the student deaf or hard of hearing? Yes No If yes, describe any additional support needs:
ASSISTIVE TECHNOLOGY NEEDS AND SERVICES - Assistive technology (AT) is any item, piece of equipment, software program, or product system that is used to increase, maintain, or improve access for persons with disabilities.
Does the student need assistive technology needs and services?
Yes No
HEALTH
Are there any health needs that may impact the student's ability to access their education? Is a health care plan developed? Yes No
If yes to either question above, describe any health needs that may impact the student's ability to access their education.

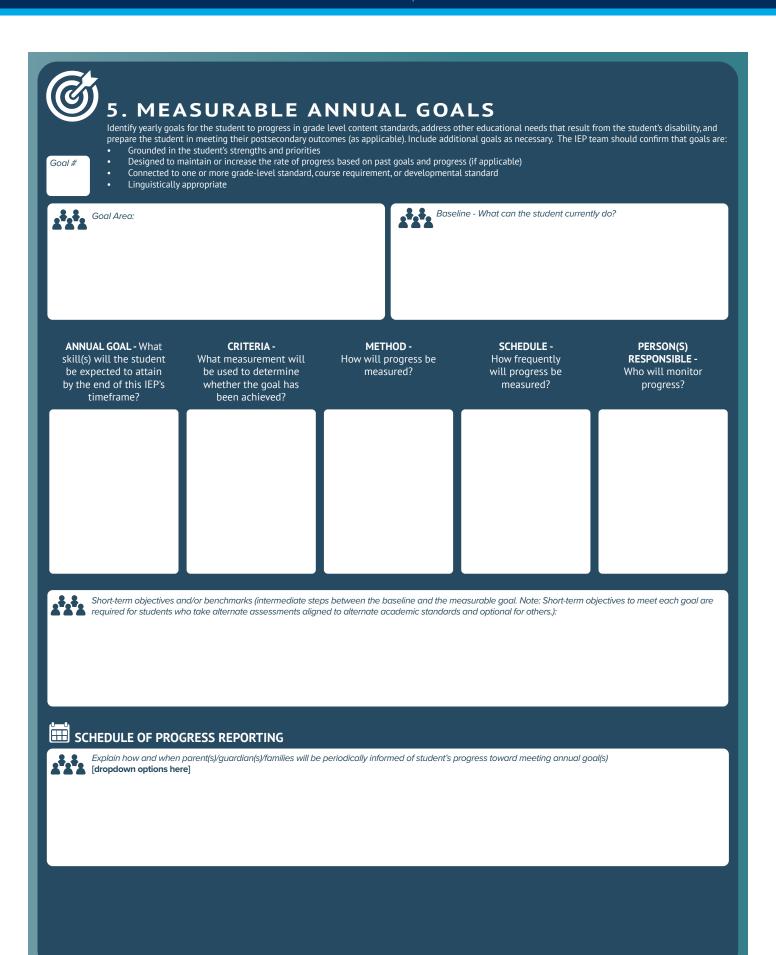


COMMUNICATION
Describe how the student communicates.
Describe strategies previously implemented that have supported the student to communicate successfully.
Does the student require the use of augmentative and alternative communication (AAC)? Yes No Krys, describe how the IEP team will address the student's needs (including training on the use and implementation).
ADDITIONAL AREAS
Briefly describe current performance in any additional area (such as activities of daily living, motor, or sensory) relevant to development of this IEP.
AREAS OF NEED
For the student to receive educational benefits, goals will be written to address the following areas of need:

4. PATHWAY TO HIGH	SCHOOL GRADUATION
SECONDARY & POSTSECONDARY VISION STATEMENT	
	ostsecondary education (education, employment, and independent living).
COURSE OF STUDY - Required for students entering high s	chool and/or currently in high school
What requirements does the student need to meet to obtain a high sch	ool diploma? What is the student's planned course of study?
s Is there a multi-year description of student's coursework	If this student is eligible to take the California Alternate Assessment, will this student
from the current year to anticipated exit year, in order to enable the student to meet their postsecondary goal?	obtain a high school diploma through the alternative pathway?
Yes Yes	No If yes, describe the alternative pathway to a diploma
HIGH SCHOOL GRADUATION Date Total Credits Required Credit	s Earned Already Remaining Credits Needed
8.8. If the student will not obtain a diploma, provide rationale:	
MEASURABLE POSTSECC	
By the student's 16th birthday (or at a younger age if determined approp	riate), long-term goals for living, working, and learning as an adult should
	ormance, describe transition goals for the student that focus on the ferences, and vision statement as they relate to transition from school to
post-school activities. Was the Yes I If appropriate, Yes Were age-	Yes List the transition assessments used and describe the
Student were other appropriate invited? No agencies No transition	No No
invited to the ssessment meeting? _{N/A} used?	s L
EDUCATION GOALS	
After I graduate I will	
Activities to support this transition goal:	Person or Agency Responsible:

Final IEP Template

EMPLOYMENT GOALS	
Activities to support this transition goal:	Person or Agency Responsible:
INDEPENDENT LIVING SKILLS GOALS	
After I graduate I will	
Parent/Guardian/Families	
Activities to support this transition goal:	Person or Agency Responsible:
COMMUNITY EXPERIENCES After I graduate I will	
Activities to support this transition goal:	Person or Agency Responsible:
Is there an appropriate Yes Is the postsecondary Yes goal(s) addressed/ postsecondary goal(s) No updated in No updated in No conjunction with the development of the Annual IEP?	Are there transition Yes Are there annual Yes goal(s) included in the IEP that will No reasonably enable the student to meet his or her postsecondary goals?
Signature of Student:	



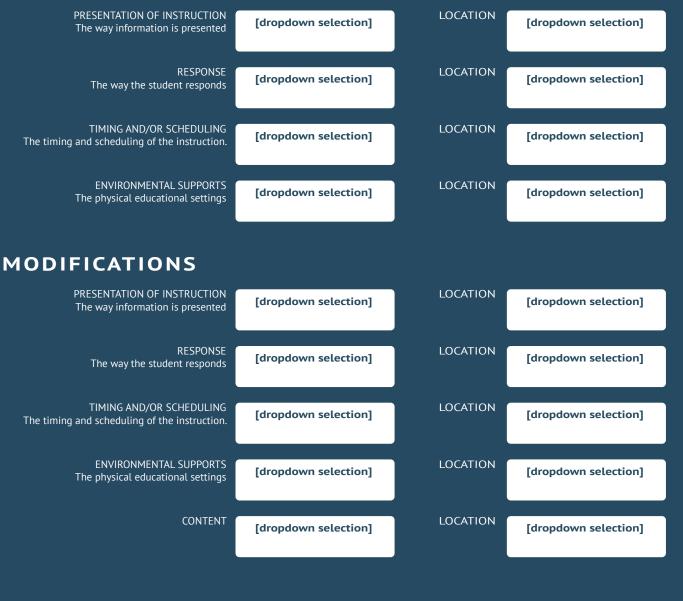
6. SUPPORTS & SERVICES

The IEP team should develop these sections to include the program supports (which may include positive behavioral supports, school personnel and/or parent/guardian/family training/supports), accommodations, modifications, and special education and related services that will assist the student in reaching IEP goals. Services should also allow the student to be involved and progress in academic and social/emotional learning, to participate in extracurricular/nonacademic activities, and to allow the student to participate with nondisabled peers while working toward IEP goals.

ACCOMMODATIONS & MODIFICATIONS

Generally, an *accommodation* is a support that provides access to learning in grade level content standards. A *modification* usually means a change in what is being taught to or expected from the student. List the accommodations and modifications, if any, that are needed to the student's program so they can meet their goals, make progress, and participate in activities alongside students with and without disabilities. Leave blank any boxes that are not appropriate for the student.

ACCOMMODATIONS



PARTICIPATION IN LOCAL & STATEWIDE ASSESSMENTS

Only designated supports, accommodations or modifications required by the student for classroom instruction and testing, as noted in Section 6, may be used during statewide or local assessments.

LOCAL ASSESSMENTS

- Local assessments are not administered at this student's grade level [if checked, move to Statewide Assessment section]
- Student will participate in local assessments without accommodations.
- Student will participate in local assessments with the following accommodations or modifications:

Student will take a local alternate assessment. The alternate assessment is appropriate, and the student cannot participate in the local general assessment for the following reasons:

STATEWIDE ASSESSMENTS

The CA Assessment Accessibility Resources Matrix describes the embedded and non-embedded universal tools, designated supports, and accommodations allowed as part of the CAASPP and English Language Proficiency Assessments for California (ELPAC). For each assessment, select the statement describing the student's participation.



DESIRED RESULTS DEVELOPMENTAL PROFILE - DRDP (PRESCHOOL ONLY)

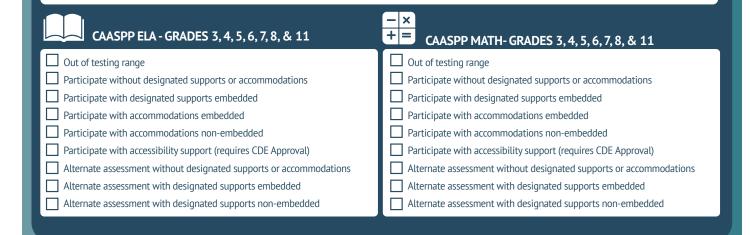
Student will participate without adaptations.
 Student will participate with the following adaptations:
 Sensory support
 Functional positioning
 Alternative response mode
 Assistive equipment or device
 Visual support

Other:

ALTERNATE ASSESSMENT

No

Will the student participate in any alternate assessments? If yes, describe and provide rationale:



CA SCIENCE TEST - GRADES Out of testing range Participate without designated support Participate with designated supports e Participate with accommodations emb Participate with accommodations non- Participate with accessibility support (r Alternate assessment with designated Alternate assessment with designated Alternate assessment with designated	ts or accommodations mbedded edded embedded equires CDE Approval) red supports or accommodations supports embedded	 Out of testing i Participate witi Participate witi Participate witi Participate witi Participate witi Participate witi Alternate asses Alternate asses 	SICAL FITNESS TEST - GRADES 5, 7, & 9 range hout designated supports or accommodations h designated supports embedded h accommodations non-embedded h accossibility support (requires CDE Approval) assment without designated supports or accommodations assment with designated supports embedded assment with designated supports non-embedded
ENGLISH LANGUAGE PROFI	CIENCY ASSESSMENT FOR C	ALIFORNIA (ELPAC	
The student will participate in:	 Without designated supports With designated supports Without accommodations (all Domain exemption Oral language compo Listening Speaking Written language com Reading Writing Alternate ELPAC Expressive (Speaking Alternate ELPAC Designation 	(all domains) (all domains) I domains) osite nposite g & Writing) g & Reading)	Embedded Accommodations Non-Embedded Accommodations

Special Education and Related Services The IEP team specifies the specially designed instruction, related services, and supports based on peer-reviewed research to the extent practicable (including, if applicable, positive behavioral supports and support/training for school personnel and/or parent[s]). Students should be educated in a general education environment to the maximum extent appropriate.

LEAST RESTRICTIVE ENVIRONMENT

State and Federal laws require that students with an IEP receive their education and services in the general education classroom alongside nondisabled peers to the maximum extent possible. A student's education is provided outside of the general education environment only when their needs are so significant that they cannot be met even with supplementary aids and supports.

Will the student attend residence? Yes No If no, include a justification	27	Yes No Interpretendent No Interpretent No Interpretent No Interpretent No Interpretent No Interpretent No. Include a	ucational needs be met in the Is and services? anation of the extent to which description of the specific sup student would be removed fro	the student will not participat	e in general considered before
CONSULTATION (INDIREC			D PARENTS/GUARDIA ation Total Minute		Related Goal(s) & Areas of Need
or Related Service F		k, per month) Total m	ninutes) (Indirect servic	es) Location	Addressed
		Start	Date End Date		
SPECIAL EDUCATION AN	D RELATED SERVICES	S IN THE GENERAL EI	DUCATION CLASSROOM	(DIRECT SERVICES)	Related Goal(s) &
Special Education or Related Service F		-) (),	ation Total Minute ninutes) (Direct service		Areas of Need Addressed
		Start	Date End Date		
SPECIAL EDUCATION ANI	D RELATED SERVICES	5 IN OTHER SETTING	S (DIRECT SERVICES)		Related Goal(s) &
Special Education or Related Service F			ation Total Minute ninutes) (Direct service		Areas of Need Addressed
		Start	Date End Date		
Complete this section f	or all students ages	5 to 22 who are in	transitional kinderga	rten, K, or greater	
Total minutes of services provided in general education	Total minutes of serv provided outside ger education		minutes education	ge of special and related P meral education	lan Effective Start Date
generation					

Preschool Program Setting (3 to 5-year-old Preschool & 4-year-old Transitional Kindergarten/Kindergarten): [dropdown selection]	Where does the student receive the majority of their special education services in the general early childhood program?
 Will the student receive the majority special education and related services embedded within general classroom routines and activities? Yes No If no, describe all options explored for providing special education services in a general early childhood setting: 	Different Location (describe below)
NONACADEMIC AND EXTRACURRICULAR ACTIVITIES	5
Describe how the student will participate in nonacademic and e	extracurricular activities with their nondisabled peers, including any activities and community ccommodations, and modifications necessary for the student's success.
Describe how the student will participate in nonacademic and experiences to support post-school goals. Note the supports, as ANSITION PLANNING	extracurricular activities with their nondisabled peers, including any activities and community accommodations, and modifications necessary for the student's success.

	ON				
Yes No	quire special transporto	ation? equipment, and/or other needs	:		
	DOL YEAR (ESY)				
Is the student eligib Extended School Y Yes No	ear? determine elig If the IEP tean further data a what is the do		IEP god	IGIBLE STUDENTS ONL Ils and, when appropriate t will be addressed during	e, short-term objectives from this
What additional da to make this detern		eviewed by the IEP Team			
5Y CONSULTATION (I Special Education	NDIRECT SERVICE	ES TO SCHOOL PERSONI Frequency (per day, per week, per month)	NEL AND PARENT Duration (Total minutes)	FS/GUARDIANS/FA Total Minutes (Indirect services)	MILIES) Related Goal(s) & Areas of Need Addressed
SY CONSULTATION (I		Frequency (per day,	Duration	Total Minutes	Related Goal(s) & Areas
5Y CONSULTATION (I Special Education or Related Service	Provider	Frequency (per day,	Duration (Total minutes) Start Date	Total Minutes (Indirect services) End Date	Related Goal(s) & Areas of Need Addressed
SY CONSULTATION (I Special Education or Related Service	Provider ON AND RELATED	Frequency (per day, per week, per month) SERVICES IN THE GENE Frequency (per day,	Duration (Total minutes) Start Date	Total Minutes (Indirect services) End Date I CLASSROOM (DIR Total Minutes	Related Goal(s) & Areas of Need Addressed ECT SERVICES) Related Goal(s) & Areas
SY CONSULTATION (I Special Education or Related Service	Provider ON AND RELATED Provider	Frequency (per day, per week, per month) SERVICES IN THE GENE Frequency (per day,	Duration (Total minutes) Start Date ERAL EDUCATION Duration (Total minutes) Start Date	Total Minutes (Indirect services) End Date I CLASSROOM (DIR Total Minutes (Direct services) End Date	Related Goal(s) & Areas of Need Addressed ECT SERVICES) Related Goal(s) & Areas

	7. PARENT INVOLVEMENT
D	Did the school provide opportunities for meaningful parent/guardian/family participation? es No Describe how:
How will the I	EP team partner with the family in supporting the student?
instruction o	8. EMERGENCY CONDITIONS or services, or both, cannot be provided to the student either at the school or in person for more than 10 school days due to nditions, taking public health orders into account, the IEP will be provided as described below
	Education and Related Services
Suppler	nentary Aids and Services (accommodations, modifications, and other supports) in the IEP
Transiti	on Services
Extende	ed School Year Services

9. IEP TEAM SIGNATURES	
CONSENT A parent/guardian/family (or student age 18-22) may agree to all, some, or none of	the components of a proposed IFP
I agree to all parts of the IEP.	
I decline the offer of initiation for special education services	
I understand that my child is not eligible for special education.	
I understand that my child is no longer eligible for special education. I agree with the IEP, with the exception of the areas described below:	
Note areas of disagreement:	
Signature below is to authorize and approve the IEP	
SignatureDate	
IEP TEAM MEMBER PARTICIPATION	
TEAM MEMBER PARTICIPANT - PARENT/GUARDIAN/FAMILIES	
Signature Date	
Parent	Foster Parent
Guardian	Adult Student
Surrogate Parent Surrogate Parent TEAM MEMBER PARTICIPANT - STUDENT	Other:
Signature Date	
TEAM MEMBER PARTICIPANT - GENERAL EDUCATION TEACHER	
Signature Date	
TEAM MEMBER PARTICIPANT - EDUCATION SPECIALIST	
Signatura	
Signature Date TEAM MEMBER PARTICIPANT - ADMINISTRATOR OR ADMINISTRATOR	
Signature Date	
TEAM MEMBER PARTICIPANT - SCHOOL PSYCHOLOGIST	
TEAM MEMBER PARTICIPANT - RELATED SERVICE PROVIDER	
Signature Date	
TEAM MEMBER PARTICIPANT - TITLE	
Signature Date	

10. PROCEDURAL SAFEGUARDS & PARENT/ GUARDIAN/FAMILIES/ADULT STUDENT NOTIFICATIONS
Parent/Guardian/Families/Adult Student has been provided the Procedural Safeguards in their native language or other mode of communication. Offered and accepted Offered and declined
Parent/Guardian/Families/Adult Student has received a copy of assessment report (if applicable). Yes No
Parent/Guardian/Families/Adult Student has received a copy of the Individualized Education Program. Yes No
Parent/Guardian/Families/Adult has received written notification of protections available to parents when Local Education Agency requests to access Medi-cal benefits. Yes No

RECOMMENDATIONS

During its 2-year process, the Panel met its charge to revise the IEP template of the previous Workgroup. The recommendations detailed below are based on the collective work of the Panel, feedback from CA state agencies and education partners, and the prior Workgroup's recommendations. The recommendations involve accessible design, technology integration, statewide and cross-agency guidance, translation, training, and usability testing.

1. Provide statewide guidance on the purpose and goal of the IEP template.

The Panel recommends that the California Department of Education (CDE) provide guidance on the vision for IEPs in the state in accordance with the Panel's guiding principles: collaborative, student-centered, assets-based, and outcome driven. CDE should post the IEP template and guiding principles, in multiple languages, on their website (also see Recommendation 5).

2. Incorporate the IEP template on a platform accessible to school teams and families.

The Panel recommends IEP vendors that are currently contracted with Local Educational Agencies (LEAs) in California consult with the High Quality IEP Special Education Resource Lead as needed to support the addition of IEP template forms within their Special Education data system, and ensure accessibility and usability. The Panel also recommends that LEAs provide access to IEPs within any existing electronic parent portals and/or school-to-home electronic systems.

3. Integrate IEP template training and implementation into the Statewide System of Support (SSOS).

The SSOS includes the Special Education Resource Leads, one of whom is the High Quality IEP Special Education Resource Lead, a position established under the 2022 Budget Act pursuant to California Education Code sections 52073 and 52073.2 with the following grant assurances:

- Create and provide a training and implementation structure to support LEAs and families regarding the development of high-quality, standards-aligned, growth-oriented IEP goals and services.
- Assist in the implementation of the statewide IEP template initially developed by the Workgroup authorized in SB 74 (2020) and further refined by the expert panel established pursuant to SB 154 (2022).
- Create parent/family engagement strategies and supports to assist parents and families in meaningfully participating in the IEP process.
- Assist in the curation of evidence-based practices and resources for COE³, SELPA, district, and charter school use.

Recommendations for training include addressing multiple audiences (e.g., general educators, special educators, families, students, and preservice preparation programs in institutes for higher education), how to write appropriate content and integrate Universal Design for Learning, and how to meaningfully collaborate within IEP teams.

³ County Offices of Education

4. Pilot the template with LEAs.

The Panel recommends that CDE and CCEE collaboratively identify at least two LEAs to pilot the template. The pilot should include a process to gather feedback from IEP team members to further refine the template as needed. The Panel recommends additional funding be allocated to the pilot LEAs to utilize their existing IEP software provider(s) to create an electronic version of the template and collaborate with the High Quality IEP Special Education Resource Lead for ongoing training and implementation support.

5. Translate the IEP template into multiple languages.

The Panel recognizes the importance of translation of the template for family accessibility. At minimum, CDE should translate the IEP template consistent with the requirements of state and federal law into all languages in which the procedural safeguards are available. This will ensure that the primary language of the family is not a barrier for meaningful engagement in the IEP process.

6. Collaborate with the SELPAs for ongoing edits to the IEP template.

The Panel recommends that CDE collaborate with the SELPA Administrators Association of California to update the template as required by legislative and/or legal updates.

7. Develop additional resources to support teaching strategies.

The Panel recommends that the existing Special Education Resource Leads create additional resources to support implementation of the IEP template, including an IEP At-A-Glance information sheet and a Teaching Strategies Articulation Form.

The At-A-Glance should include key information about IEP implementation pulled directly from the IEP. It is recommended that LEAs be able to select fields in creating the document. However, suggested fields include:

- Student strengths, preferences, interests, and needs
- Student's primary language, if an English Learner
- Student Learning Needs & Strategies (all three boxes)
- Blindness & Visual Support Needs
- Deaf & Hard of Hearing Support Needs
- Assistive Technology Needs and Services

- Social/Emotional/Behavioral
- Communication
- Education, Employment, & Independent Living (first box from each section)
- Annual Goals
- Accommodations
- Modifications
- Special Education and Related Services

• Health

As students transition between educators, the knowledge of the student from one educator to another should be shared as the student articulates between providers. The Panel recommends that the High Quality IEP Special Education Resource Lead develop a Teaching Strategies Articulation Form for this purpose.

8. Provide funding to support IEP template implementation.

The Panel recommends that CDE invests in next steps for usability. Currently the High Quality IEP Special Education Resource Lead is funded to support training and implementation of the IEP template. However, the Panel recommends that additional funding be allocated to the High Quality IEP Special Education Resource Lead to collaborate with LEAs to pilot the IEP template, work with vendors of pilot IEP LEAs to program the template, and evaluate the pilot of selected LEAs being trained to test usability.

9. Review requirements for additional legal review.

Although the template has been vetted by state agency attorneys as well as informal feedback from education partners representing legal firms, the Panel recommends the template undergo a thorough legal review and vetting process in future phases of implementation. This should include a robust legal analysis from various viewpoints.

APPENDIX A: IEP EXPERT PANEL MEMBERSHIP

The Panel consisted of eight members (see table below) and was facilitated by Mindy Fattig, Senior Advisor of the Statewide System of Support, and Stacey Wedin, Assistant Director of Teaching, Learning, and Leading at CCEE.

Facilitators selected Panelists with the consultation and approval of the SBE Executive Director. The number of Panelists was limited to 10 so that the individuals could meaningfully engage in the detailed work of refining documents and forms. Selection criteria included established expertise in special education with an understanding of how special education services and supports are delivered in California.

The final Panel membership represented perspectives of practitioners, parents, trainers of pre-service teachers, advocates, district level administrators, policy makers, and state-level technical assistance providers.

Panel Member and CCEE Facilitator Names	Current Role
Dr. Zoee Bartholomew	Director of Special Education Programs and Assistant Professor, Dominican University
Heather DiFede	Executive Director, East County Special Education Local Plan Area (SELPA)
Mindy Fattig	Senior Advisor, Statewide System of Support, CCEE
Dr. Vicki Graf	Professor, Loyola Marymount University
Dr. Ira Lit	Faculty Director, Stanford Teacher Education Program
Sharon Olken	Member, SBE; Executive Director, Gateway Public Schools
Keila Rodriguez	Superintendent, Meadows Union School District
Kristen Uliasz	Secondary Resource and Inclusion Specialist, Instructional Coach, Davinci Charter Academy
Danielle Iberri Walker	Senior Director of Specialized Services, Bonita Unified School District
Stacey Wedin	Assistant Director of Teaching, Learning, and Leading, CCEE
Kristin Wright	Executive Director of Equity, Diversity, Early Intervention, and Support Services, Sacramento County Office of Education

IEP Expert Panel Members

APPENDIX B: ADMINISTRATIVE DATA SHEET

STUDENT INFORMATION

Legal First Name	Legal First Name	Legal Suffix	
Student ID	SSID	Grade	
Date of Birth	Age	Native Language	
English Learner	Hispani <u>c</u>	Ethnicity Intentionally left blank	
Yes No	Yes No	check box if true	
Redesignated English Learner	Race	Race Intentionally left blank	
Yes No	Race 1	check box if true	
Interpreter Yes No	Race 2		
	Race 3		
	Race 4		
	Race 5		

PLAN INFORMATION

District of Special Education Accountability

Primary Residence

Plan Effective Start Date

Appendix B—Continued

PARENT/GUARDIAN INFORMATION

Parent/Guardian Name

Home Phone	Work Phone	Cell Phone
Street Address	Street Address 2	City
State	Zip Code	Email Address
Parent/Guardian Name		

Home Phone	Work Phone	Cell Phone
Street Address	Street Address 2	City
State	Zip Code	Email Address
MEETING INFORMATION		
IEP Date	Next Annual Plan Review	Next Eligibility Evaluation

Last Eligibility Evaluation	Meeting Ty	De		
	Initial	Plan Review	Reevaluation	

Appendix B—Continued

Additional Purpose of Meeting (if needed)

Transition	Pre-Expulsion	Interim	Other	
	1			

FOR INITIAL PLACEMENTS ONLY

Date of Initial Referral for	Person Initiating the
Special Education Services	Referral to Special Education
Date District Received Parent	Date of Initial Meeting to Determine
Consent	Eligibility

STATUS INFORMATION

Special Education Status	Status Effective Start Date	Nonparticipation Code

SCHOOL INFORMATION

School	of A	tten	dance	Name
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Telephone Number

Street Address

Street Address 2

City

State

Zip Code

APPENDIX C: CALPADS CROSSWALK

	Special Education Plan File				
CALPADS Field #	CALPADS Field Name	Data Source	CALPADS Field # and Location	CALPADS Field Name	Data Source
23.01	Record Type Code	Special Education Data System (SEDS)	23.20	Special Education Program Setting Code	IEP: Special Education and Related Services (Program Setting)
23.02	Transaction Type Code	SEDS	23.21	Preschool Program Setting Service Location Code	IEP: Special Education and Related Services (Program Setting)
23.03	Local Record ID	SEDS	23.22	Ten or More Weekly Hours in Setting Indicator	IEP: Special Education and Related Services (Program Setting)
23.04	Reporting LEA	SEDS	23.23	General Education Participation Percentage	IEP: Special Education and Related Services (Program Setting)
23.05	Academic Year ID	SEDS	23.24	Special Education Program Type Code	IFSP
23.06	SSID	Admin Data Sheet	23.25	IEP Includes Postsecondary Goals Indicator	IEP: Pathway to High School Graduation (Measurable PostSecondary Goals)
23.07	Local Student ID	SEDS, Admin Data Sheet	23.26	Postsecondary Goals Updated Annually Indicator	IEP: Pathway to High School Graduation (Measurable PostSecondary Goals)
23.08	Local Special Education Student ID	SEDS	23.27	Postsecondary Goals Age Appropriate Transition	IEP: Pathway to High School Graduation (Measurable PostSecondary Goals)
23.09	Reporting SELPA	SEDS	23.28	Transition Services in IEP Indicator	IEP: Pathway to High School Graduation (Measurable PostSecondary Goals)
23.10	District of Special Education Accountability	Admin Data Sheet	23.29	Supportive Services Indicator	IEP: Pathway to High School Graduation (Measurable PostSecondary Goals)
23.11	Special Education Plan Type Code	SEDS	23.30	Transition Services Goals in IEP Indicator	IEP: Pathway to High School Graduation (Measurable PostSecondary Goals)
23.12	Special Education Plan Effective Start Date	IEP: Special Education and	23.31	Student IEP Participation Indicator	IEP: Pathway to High School Graduation (Measurable PostSecondary Goals)
23.13	Reason For Plan Record Code	SEDS	23.32	Agency Representative IEP Participation Code	IEP: Pathway to High School Graduation (Measurable PostSecondary Goals)
23.14	Primary Residence Code	Admin Data Sheet	23.33	Special Transportation Indicator	IEP: Special Education and Related Services (Transportation)
23.15	Disability 1 Code	IEP: Present Levels (Student Profile Section)			
23.16	Degree of Support	SEDS			
23.17	Disability 2 Code	IEP: Present Levels (Student Profile Section)			
23.19	Infant Regional Center Services Eligibility Indicator	IFSP			

Appendix C—Continued

Special Education Services			
CALPADS Field #	CALPADS Field Name	Data Source	
25.01	Record Type Code	SEDS	
25.02	Transaction Type Code	SEDS	
25.03	Local Record ID	SEDS	
25.04	Reporting LEA	SEDS	
25.05	Nonpublic Agency Identifier (NPA)	SEDS	
25.06	Academic Year ID	SEDS	
25.07	SSID	Admin Data Sheet	
25.08	Local Student ID	SEDS, Admin Data Sheet	
25.09	Reporting SELPA	SEDS	
25.10	District of Special Education Accountability	SEDS, Admin Data Sheet	
25.11	Special Education Service Code	IEP: Special Education and Related Services (General Education and Other Settings, Direct Services)	
25.12	Special Education Service Provider Code	IEP: Special Education and Related Services (General Education and Other Settings, Direct Services)	
25.13	Special Education Service Location Code	IEP: Special Education and Related Services (General Education and Other Settings, Direct Services)	
25.14	Service Frequency Code	IEP: Special Education and Related Services (General Education and Other Settings, Direct Services)	
25.15	Service Duration	IEP: Special Education and Related Services (General Education and Other Settings, Direct Services)	
25.16	Local Special Education Student ID	SEDS	
25.17	Plan Effective Start Date	IEP: Special Education and Related Services (Program Setting Section)	

Appendix C—Continued

Special Education Meetings				
CALPADS Field # and Location	CALPADS Field Name	Data Source		
24.01	Record Type Code	SEDS		
24.02	Transaction Type Code	SEDS		
24.03	Local Record ID	SEDS		
24.04	Reporting LEA	SEDS		
24.05	Academic Year ID	SEDS		
24.06	SSID	SEDS, Admin Data Sheet		
24.07	Local Student ID	SEDS, Admin Data Sheet		
24.08	Local Special Education Student ID	SEDS		
24.09	Reporting SELPA	SEDS		
24.10	Special Education Referral Date	Depending on System, Admin Data Sheet		
24.11	Referring Party Code	Admin Data Sheet		
24.12	Initial Evaluation Parental Consent Date	Admin Data Sheet		
24.13	Special Education Meeting Date	Admin Data Sheet		
24.14	Pending As Of Date	SEDS		
24.15	Meeting Delay Code	SEDS		
24.16	Meeting Activity - Evaluation Type Code	Admin Data Sheet		
24.17	Meeting Activity - Plan Review Indicator	Admin Data Sheet		
24.18	Evaluation Outcome Code	SEDS		
24.19	Parental Involvement Facilitation Code	IEP: Parent Involvement		

Students with Disabilities Status				
CALPADS Field # and Location	CALPADS Field Name	Data Source		
22.01	Record Type Code	SEDS		
22.02	Transaction Type Code	SEDS		
22.03	Local Record ID	SEDS		
22.04	Reporting LEA	SEDS		
22.05	Academic Year ID	SEDS		
22.06	SSID	SEDS, Admin Data Sheet		
22.07	Local Student ID	SEDS, Admin Data Sheet		
22.08	Local Special Education Student ID	SEDS, Admin Data Sheet		
22.09	Reporting SELPA	SEDS		
22.10	Special Education Initial Entry Start	Admin Data Shee		
22.11	Special Education Status Effective Start	Admin Data Shee		
22.12	Special Education Status Code	SEDS, Admin Data Sheet		
22.13	Non-Participation Reason Code	Admin Data Shee		