California Statewide Individualized Education Program (IEP) Workgroup Report

Provided to the chairs of the relevant policy committees and budget subcommittees of the Legislature, the Executive Director of the State Board of Education, the Superintendent of Public Instruction, and the Director of Finance

Authorized by the Budget Act of 2020, Senate Bill 74

October 1, 2021

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1. Executive Summary

The Statewide IEP Workgroup, authorized by the Budget Act of 2020, Senate Bill 74, met from December 2020 to July 2021 to make recommendations to improve the process for developing individualized education programs (IEPs) for students who are eligible to receive special education and related services. The IEP for each student should be designed to improve their long-term functional and academic outcomes by capturing strengths and needs and informing learning strategies that support instruction.

The IEP template developed by the workgroup was driven by their vision that the IEP be centered on the student and their long-term goals, with a focus on increasing participation in general education for every student. Participating in high quality instruction in the general education setting produces the best outcomes for students with IEPs and to make that happen, the IEP must be a useful tool for general education teachers, describing how the student best learns and the impact of their disability.

The IEP is more than just a form. The IEP process is ongoing and improving it, as well as improving student outcomes, is dependent on systematic training and supports for all IEP team members – students, parents/guardians, providers, and administrators – that reinforces the state's priorities for the IEP to be strengths-driven and student-centered. The workgroup recommends the adoption of a statewide IEP template to increase transparency for families and educators, support the successful inclusion of students with IEPs in general education, and improve student outcomes. The workgroup recommends an intentional transition to the statewide template advised by stakeholders and in coordination with training and supports.

2.   Introduction

In the Individuals with Disabilities Education Act (IDEA) statute, Congress wrote:

> Disability is a natural part of the human experience and in no way diminishes the right of individuals to participate in or contribute to society. Improving educational results for children with disabilities is an essential element of our national policy of ensuring equality of opportunity, full participation, independent living, and economic self-sufficiency for individuals with disabilities (IDEA at 20 U.S.C. §1400 (c)(1)).

Each student who is eligible for special education and related services receives services and supports to ensure their full participation as agreed upon in an Individualized Education Program (IEP), a written plan developed collaboratively by an IEP team. The IEP development process is an opportunity for students, teachers, parents/guardians, school administrators, and related services providers to work together to create opportunities to improve student outcomes. The IEP team looks closely at the student's unique needs and pools their collective knowledge, experience, and commitment to design an educational program that will help the student meaningfully participate and progress in the general curriculum.

The IEP is the cornerstone of a quality education (Kupper, 2000). To provide that to each student identified as having a disability, the IDEA mandates content to be included in each child's IEP and what the IEP team must consider. The IDEA also provides states and, at the discretion of states, local school systems the flexibility to create their own processes for collecting and recording the required IEP information and to include additional information in the IEP. At this time, California has not required a statewide IEP template, which means each local

educational agency or LEA (i.e., school district, charter school, and in limited circumstances county office of education (COE)), may adopt and modify its own template.

In 2015, California's Statewide Special Education Task Force (Task Force) reviewed the lack of progress of students with IEPs toward improved outcomes including graduation and post-school employment, and through its report, established the need to reform California's special education systems in order to improve outcomes for students with IEPs and move to a unified system of education for all students. The Task Force's report (Task Force, 2015) recommended the IEP be as coherent as the system it reflects; that IEP team discussions about student expectations, performance, and progress be guided by the Common Core State Standard (CCSS); and that ultimately all IEPs and the goals written for them be aligned with the CCSS. The Task Force's final report (2015) also recommended that samples of standards-aligned IEPs be created and disseminated, along with comprehensive training on adapting those examples or models for use in IEP meetings, and a common data-gathering system be created to record and report on student IEP goals, monitor progress toward goals, and evaluate implementation of standards-based IEPs statewide.

3.   Workgroup Charge and Formation

Consistent with the 2015 Task Force recommendations, the state of California has engaged in significant efforts to initiate thoughtful special education reform, investing considerable funding in special education and creating technical assistance systems to build LEA capacity to improve outcomes for students with IEPs. In June 2020, the California State Legislature, through California's SB-74 Budget Act of 2020, allocated

funds for the purpose of convening a **workgroup to design a state standardized individualized education program template** with the following specifications:

> The workgroup shall include, but not be limited to, representatives of the State Department of Education, the Department of Rehabilitation, the State Department of Developmental Services, local educational agencies, special education local plan areas, legislative staff, and relevant state and national policy experts. The workgroup shall do all of the following:
>
>> (1) Examine and make recommendations regarding the following matters: ensuring the IEP development and periodic review processes are designed to improve student outcomes by capturing student strengths and needs and informing learning strategies that support instruction aligned to state standards.
>>
>> (2) Design a state standardized IEP template that provides information about student strengths, needs, and learning strategies.
>>
>> (3) Support transition planning with early learning and postsecondary options.
>>
>> (4) Assess the feasibility of a web-based statewide individualized education program system to house a statewide template.
>>
>> (5) Design a state standardized addendum to the individualized education program that addresses distance learning modifications and adaptations to the IEP necessitated by a state or local emergency, including best practices recommendations.

The California Department of Education (CDE) contracted with the Sacramento County Office of Education (SCOE), which worked with WestEd and the Glen Price Group (GPG) to determine key roles and perspectives that should be represented by workgroup members and to identify and invite workgroup members accordingly. In November 2020, the workgroup was formed consisting of 38 members including parents, K-12 and early learning special education and regular education teachers, related services providers, school district administrators, Special Education Local Plan Area (SELPA) representatives, higher education professionals, researchers, and state

agency representatives. In addition, many workgroup members have relevant lived experience navigating the IEP process as parents, family members, or former students with IEPs themselves. During the workgroup's launch meeting in December 2020, members estimated the number of IEP meetings they had attended (as parents/family members, teachers, providers, administrators, advocates, and coaches). **Altogether, workgroup members estimated they had participated in nearly 20,000 IEP meetings and most members had participated in more than one IEP team member role.** A full list of workgroup members, leadership and their organizational affiliations is provided in appendix A.

4. Workgroup Vision: An IEP Process Designed to Improve Outcomes

During the first two workgroup meetings, the workgroup established a vision to ground and guide its work in designing a statewide IEP template and making recommendations for an improved IEP process.

The workgroup envisions a future in which, for every student with an IEP:

- IEP outcomes are student-focused, strengths-based, aligned to standards, and backwards mapped from long-term goals including gainful employment.
- General education teachers meaningfully participate in the IEP process, contribute to plans to increase participation in general education, and find IEPs to be a valuable tool for teaching and inclusion.
- Special education teachers and providers empower a student-led/driven IEP process and develop IEPs that include information about student strengths,

needs, and learning strategies, including the supports needed for the student to participate in general education.

- Families and students access information on the comprehensive services available throughout a student's life including integrated school supports (outside of special education) aimed at long-term positive experiences and outcomes.

This vision represents a change from current practice and perception. The workgroup acknowledges that significant work will be needed to guide the state and local education systems though a mindset shift in order to realize this vision. However, the workgroup also believes that a common statewide IEP template that is thoughtfully designed to empower IEP teams to enact this vision can be a catalyst for change and help establish the opportunity for full participation and improved achievement intended by the IDEA. The workgroup has designed a strengths-driven, student-centered IEP template and recommendations for policies, training, and resources that can empower all IEP team members – specifically students, parents/guardians, and general education teachers – to more meaningfully engage in the IEP process. Further, the template is structured to lead to more meaningful discussions about the IEP goals, services, and support each California student with an IEP needs to progress toward full participation, independent living, and economic self-sufficiency (IDEA at 20 U.S.C. §1400 (c)(1)).

Workgroup members reported and confirmed through surveys of broad stakeholders, as described in section 8, that many students, parents, and teachers do not currently report that they feel they are part of a meaningful IEP experience.

Currently, California does not have a statewide IEP template, IEP system, or common IEP training resources establishing the expectation for and building the capacity of IEP teams to hold student-centered, strengths-based IEP meetings. IEP forms as well as IEP development and revision processes vary significantly across the state. Many LEAs use an IEP template adapted from the forms developed by the SELPA Administrators of California's Forms Committee. Nearly every LEA in California uses an online IEP system from a vendor to house its template and complete IEPs and a few LEAs have in-house IEP systems. This report details how the workgroup envisions the state meaningfully transitioning to a statewide IEP template surrounded by intentional, relevant, and useful supports, including training and resources, that will contribute to more equitable opportunity for improved student outcomes across LEAs, through the IEP development and revision processes.

5. IEP Template, System, Training, and Resources Framework

The workgroup organized its work around the legislative charges (see section 3) and developed recommendations designed to make progress toward the workgroup's vision (see section 4). Given the workgroup's multiple charges related to the IEP template, IEP system, and the IEP development and periodic review processes, the workgroup developed a framework for organizing its work and differentiating between these interrelated elements. As shown in figure 1, the framework is illustrated through four concentric circles.

The **student** is at the center of the diagram to clarify that the IEP template, system, and training and resources to support the IEP process should be designed and implemented to maximize student support and benefit. The next layer is the **IEP template** consisting

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of the forms that are completed during the IEP process to collect necessary data and provide access to the student's program throughout the year, followed by the **IEP system** which refers to the mechanisms (technology and otherwise) the IEP team uses to access and complete the IEP template. The outermost layer is **IEP training and resources** which include various types of training (e.g., online modules, coaching, workshops) and resources such as policy guidance, checklists, and other and tools (e.g., written guides for each IEP team member, agendas) outside of the IEP template and system to support the IEP process.

Figure 1. Framework for designing a student-centered IEP template with the necessary systems, training, and resources needed to ensure the IEP processes improve student outcomes.
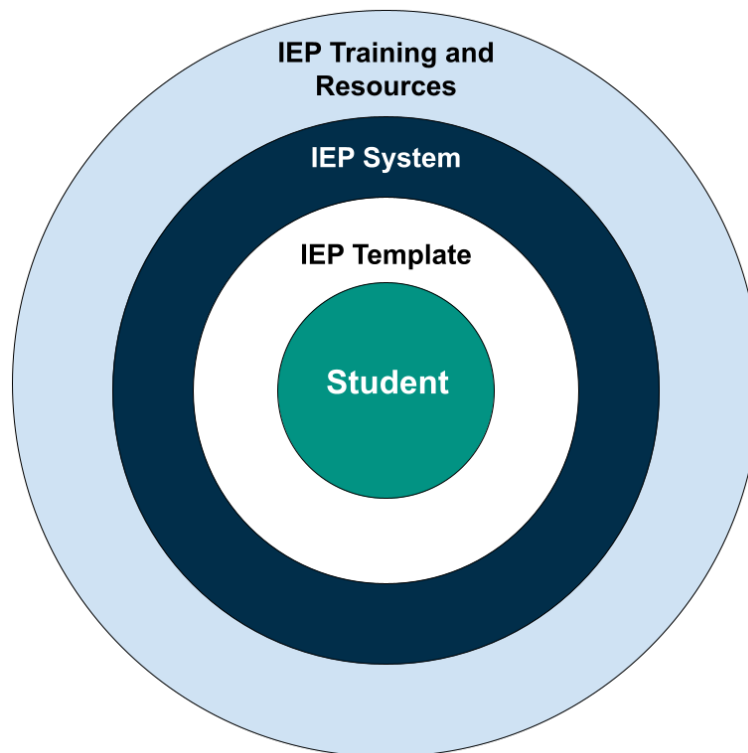
These concentric circles rely on and interact with other aspects of special education reform and components of the general education system including processes for referring and evaluating students for special education, allocation of human and fiscal resources to adequately support teachers and providers, provision of high-quality core instruction supplemented by special education supports and services, and ensuring adequate time for teachers and providers to collaboratively prepare for coordinated instruction. The workgroup recognized there were additional challenges related to these and other processes that must be solved to meaningfully improve outcomes for students with IEPs. However, the workgroup agreed that the implementation and potential impact of its recommendations and the statewide IEP template are not dependent on the resolution of those challenges. Key questions that emerged in workgroup discussions but that were ultimately determined to be beyond the scope of the workgroup's charge are noted in appendix B, Related Considerations for Further Examination.

6.   Background and Literature Review

The purpose of IDEA is "to ensure that all students with disabilities have available to them a free appropriate public education that emphasizes special education and related services designed to meet their unique needs and prepare them for further education, employment, and independent living" (IDEA regulations at 34 CFR §§300.1). IDEA lays out requirements for IEP content but allows states discretion to choose or adopt a particular form or template. States are given the mandate to both ensure compliance with IDEA and use their general supervision authority to improve outcomes for students with disabilities. Requirements and guidance around an IEP template and process are one way the state establishes its priorities and communicates the expectation to

improve academic and functional outcomes and increase the delivery of services in the least restrictive environment, which for most students is the general education setting.

To better understand how to operationalize the workgroup's vision (see section 4) and to inform the development of actionable recommendations, research was reviewed on strength-based and student-led IEPs; challenges to and strategies to encourage meaningful participation of all IEP team members — specifically students, parents/families, and general education teachers — in the development and implementation of the IEP; and using the IEP to increase delivery of services and supports in general education.

6.A.   Student-centered, Strengths-based IEPs

The President's Commission on Special Education (OSERS, 2002) found that many parents, teachers, and educational administrators viewed IEPs as being "not actually designed or used for individualized education; instead they are focused on legal protection and compliance with regulatory processes" (p.16). The Commission went on to comment that 'the original concept of IEPs as an instructional framework…has been lost to the greater need to document legal and procedural compliance" (pp.16-17). While it may be difficult, collaborative problem-solving and decision-making focused on the student through the IEP process has the potential to create fundamental change in the ways that teachers teach, and students learn (Clark, 2000).

The shift to student-centered planning can certainly be encouraged through training and development of resources, but as Price, Wolensky, and Mulligan found, "It takes self-determined individuals (e.g., students, teachers, parents, paraprofessionals,

administrators) with collaboration and risk-taking skills, to be facilitators and not enablers" in order to translate student-focused IEP rhetoric into action (2002, p.109). One way to ensure IEP development is student focused and change the tone in IEP meetings is through student participation; student participation results in a focus on growth and strengths and greater parent participation (Arndt, Konrad, & Test, 2006; Danneker & Bottge, 2009; Mason, Mcgahee-Kovac, Johnson, & Stillerman, 2002; Mason, McGahee-Kovac, & Johnson, 2004; Price, Wolensky, and Mulligan, 2002; Test, Mason, Hughes, Konrad, Neale, & Wood, 2004). Translating a belief in the importance of student-centered IEPs into action requires planning and commitment but can be done.

While not required until the team is planning for secondary transition, the President's Commission (OSERS, 2002) asserted that "it is always appropriate for students with disabilities to be invited and present at IEP meetings" (p.46) and research has found a positive relationship between student participation in IEP meetings and increases in academic achievement (Barnard & Lechtenberger, 2010). Students learn confidence, self-determination, and advocacy by participating in potentially the most important discussions about their educational program (Mason et al. 2002; Hawbaker, 2007). When a student is included in the IEP process, they learn that their voice matters, and they are an active participant in important decisions. As one general education teacher shared, "For a young adolescent who craves independence, a student-led IEP is one more opportunity for him to be in control of his world" (Hawbaker, 2007). Students also benefit from preparing to participate in the IEP process; engaging students in explicit instruction on how to participate in the IEP process is an effective strategy for building

self-determination skills (Arndt et al., 2006; Danneker & Bottge, 2009; Hammer, 2004; Kelley et al., 2013; Konrad & Test, 2007; Konrad et al., 2006; Martin, Van Dycke, Christensen, et al., 2006; Neale & Test, 2010; Snyder, 2002; Test & Neale, 2004).

6.B.   Meaningful Participation of IEP Team Members in IEP Development and Implementation

IDEA intends to achieve a balance of power between parents/guardians and professionals through collaboration as an IEP team, emphasizing mutual respect for the contributions of all individuals working with a particular student, and an emphasis on valuing the knowledge that parents/guardians bring to the team (20 U.S.C. §1400; Skrtic, 1991). Collaborative meetings with increased parent involvement are related to improved school performance (Goldman & Burke, 2017; Gomez Mandic, Rudd, Hehir, & Acevedo-Garcia, 2010; Jasis & Ordonez-Jaisic, 2011; Lo, 2012). Unfortunately, this collaboration can result in clashes of values and the spirit of collaboration is often pitted against the "…value orientation of the professional bureaucracy in every way, given that it is a performance organization in which individual professionals work alone to perfect standard programs" (Skrtic, 1991, p.172). Special educators and administrators exert considerable control over the direction of IEP meetings and content, while families/guardians are frequently passive participants (Fish, 2008; Gaffney & Ruppar, 2011; Garriott, Wandry, & Snyder, 2000; Lo, 2008; Martin, Huber Marshall, & Sale, 2004; Salas, 2004; Zeitlin & Curcic, 2013).

In addition to addressing the power dynamics within the education system and between the education system and families, IEP teams must also navigate cultural differences. While many students with IEPs in California are culturally and linguistically diverse

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learners, very few special education teachers and administrators are from diverse cultures (Reiman, Beck, Coppola, & Englies, 2010). This imbalance often leads to a language and cultural barrier between culturally and linguistically diverse parents/guardians and school personnel (Lo, 2009; Reiman, Beck, Coppola, & Englies, 2010; Salas, 2004). Research on the role of Mexican American families (Salas, 2004), Chinese American families (Lo, 2008), and families from a range of other racial/ethnic groups (Fish, 2008; Garriott et al., 2000; Zeitlin & Curcic, 2013) all indicated that while parents/guardians frequently attend IEP meetings, they are often not provided the opportunity to make significant contributions to the content of their children's IEPs.

While difficult, overcoming the barriers to increased parent engagement is also manageable. Proven strategies for increasing parent engagement include making the meetings more democratic and not completing the IEP in advance so that parents feel they are equal contributors; being open to parental input regarding placement, discipline, and instruction; valuing and listening to parental input; and educating parents about the IEP process including by providing IEP forms in advance (Christle & Yell, 2010; Fish, 2006; Fish, 2008; Goldman & Burke, 2017; Platt, 2008; Simon, 2006).

6.C.   *The Role of the General Education Teacher in the IEP Process*

"Teachers represent the largest and most knowledgeable resource in programming for the needs of students. The quality of their relationship with parents and community agencies plays a large part in the overall outcomes for students." (Davis, 2008, p.3). IDEA specifies that IEP teams 'must include at least one regular education teacher of the child (if the child is, or may be, participating in the regular education environment) (IDEA at 34 CFR §300.321(a)(2)). While some general education teachers are positively

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engaged in increasing participation of students with IEPs in general education (O'Rourke & Houghton, 2009; Ross-Hill, 2009), others have been described as having more negative perspectives about the IEP process due to the time that inclusive practices demand and the potential disruption to instructional routines and other students they may cause (Cassady, 2011; Cipkin & Rizza, 2010; Horne & Timmons, 2009; Menlove, Hudson, & Suter, 2001; O'Rourke & Houghton, 2009; Orr, 2009). Other barriers to general education teacher engagement include poor relationships between teachers (Allison, 2011; Fuchs, 2010), lack of preparation to teach students with IEPs (Allday, Neilsen-Gatti, & Hudson, 2013; Cipkin & Rizza, 2010), and lack of experience with people with disabilities (Sze, 2009).

Increasing engagement of the general education teacher in the IEP process is critical for discussions about placement and the supports needed for students with IEPs to participate in general education. However, a 2019 study by the National Center for Learning Disabilities (NCLD) and Understood (Galiatsos, Kruse, & Whittaker) surveyed and conducted focus groups with general education teachers and found that only half of teachers strongly believed that students with learning and attention issues could meet grade-level expectations. "Only 56% of teachers surveyed believe IEPs provide value to students, and just 38% believe IEPs help them be better teachers" (p. 14). While every general education teacher will teach students with IEPs, Galiatsos, et al. (2019) found nearly no states have aligned their credentialing systems to that reality, resulting in teachers being unprepared to participate in the IEP process and confidently support students with IEPs in their classrooms.

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Increasing inclusion will require that general educators learn more about and become more active participants in the IEP process. General education teacher capacity must be built to leverage their knowledge of students, knowledge of the classroom context, and knowledge of resources (content, strategies, accommodations, supports, etc.) to develop more inclusive IEPs (Ball, Thames, & Phelps, 2008; Ball, 2018). Increasing general education teachers' capacity and confidence to take more leadership in developing instructional strategies for IEPs will take investments in professional learning for general education teachers that includes coaching and mechanisms for ongoing feedback.

6.D. *Increasing Delivery of Special Education Services and Supports in General Education*

Federal and state special education policies direct California schools to increase access to the general education setting for students with disabilities. The Least Restrictive Environment (LRE) component of the IDEA is the legal impetus for establishing inclusive schools that meet the needs of students with disabilities. The Elementary and Secondary Education Act (ESEA) also increased the need for inclusive programs by holding schools and districts accountable for student achievement, including for the subgroup of students with IEPs. These policy requirements and potential interventions when schools and districts fail to improve outcomes have established a context that prompts districts to improve their special education programming. The improvement of special education programming, for children with mild as well as severe disabilities, is dependent on students with IEPs participating in effective general education instruction in age-appropriate classrooms in their

neighborhood schools, with the needed supplementary aids and support services (Cole, Waldron, & Majd, 2004; Downing, Spencer, & Cavallaro, 2004; Hall & Wolfe, 2003; Katz & Mirenda, 2002; McDonnell & Hunt, 2014; Westling & Fox, 2009). A study conducted by Cole et al. (2004) indicates that achievement outcomes in math and reading for students with severe disabilities placed in 16 programs in general education settings in the state of California increased when compared with students with severe disabilities placed in separate special education settings.

Research also shows that inclusion in general education builds social and communication skills (Katz & Mirenda, 2002; Westling &Fox, 2009) and Foreman, Arthur-Kelly, Pascoe, and Smyth King (2004) indicate that even students with significant disabilities experience more communicative interaction in inclusive settings than students with significant disabilities in special education settings.

The positive impact of IDEA on inclusion is undeniable. Students with disabilities are more likely to be included in general education than they would have been 30 years ago, but there are still disparities in the placement of students with IEPs in general education. The commitment of school systems and leaders to inclusion has been found to vary tremendously from school to school, even in the same district (Carter & Hughes, 2006; Salisbury, 2006). Additionally, racial and socioeconomic backgrounds of students remain factors leading to inequality in special education placements (Blanchett, 2009; Harry & Klinger, 2006). More broadly, district-level policies and structures can create structural biases and inequalities that contribute to disproportionality, misidentification, and inequitable outcomes (Darling-Hammond, 1995; Harry & Klinger, 2006; Oakes, Franke, Quartz, & Rodgers, 2002).

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Some districts have successfully developed and implemented policies to prioritize inclusion. In a study of California school districts serving high-poverty student populations, Huberman, Navo, and Parish (2012) found that "each district that significantly closed the achievement gap between students with IEPs and their peers promoted inclusion at a district level by advocating for increased access to the general education classroom and providing professional development support to schools." A 2015 meta-analysis (Cobb) found three core special education-oriented domains to foster inclusion: inclusive program delivery, staff collaboration, and parental engagement.

7.   Workgroup Process

7.A.   Workgroup Meetings

Between December 2020 and July 2021, the workgroup convened for monthly video meetings.[1] The December 2020 meeting focused on establishing the workgroup's vision (see section 4); subsequent meetings focused on specific topics directly related to the workgroup's legislative charge. These meetings were designed to maximize workgroup member participation and input through individual reflection, paired conversations, and small group discussions. As the work progressed, meeting activities evolved from ideation and direction-setting to refinement of draft workgroup products such as the set of recommendations and statewide IEP template.

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[1] Due to the COVID-19 pandemic and associated closures and travel and meeting restrictions, all workgroup meetings were held remotely.

Beginning in March 2021, additional optional working meetings were scheduled between the monthly meetings. During these meetings, workgroup members built on key decisions and directions emerging from the monthly meetings, addressed specific topics and questions identified for further and deeper discussion during the monthly meetings, and informed the meeting objectives and agenda for the next monthly meeting.

7.B.   Information Collection, Review, and Analysis

The workgroup recognized the importance of rooting its work in student and system data, state and local examples of success related to the workgroup's charge, and the perspectives of stakeholders including families, teachers, K-12 administrators, special education service providers, and more. To inform its work accordingly, the workgroup conducted the following activities:

Review of statewide data: The January 2021 workgroup meeting included a presentation of student data from the CDE, including demographics of students with disabilities in California, graduation information about students with disabilities in California, and more.

Review, inventory, and comparison of commonly used IEP systems and templates in California: The February 2021 workgroup meeting included a series of presentations about the State SELPA Forms Committee template, SIRAS system and template, and Los Angeles Unified School District (LAUSD) system (Welligent) and template. *Note: The SEIS system uses the State SELPA Forms Committee template, but SEIS staff did not respond to a request to participate in the meeting.* During an

optional session between the February and March meetings, the workgroup reviewed a crosswalk of the different sections and prompts in these widely used IEP templates in California.

Synthesis of IEP template requirements by state: To identify examples of IEP templates that embody the workgroup's vision and some of the overall template changes suggested by workgroup members, templates used and required by other states were reviewed and synthesized. This synthesis, included in appendix C, served as a valuable reference, alongside the inventory of commonly used IEP templates in California, as the workgroup developed its proposed state standardized IEP template.

Survey of and interviews with state special education directors: In February, the workgroup conducted a survey of state special education directors, receiving responses from eight states. The survey focused on each state's current IEP template and system requirements and their experience developing and implementing these templates and systems. In addition, to learn more about implementation of a statewide template, interviews were conducted with nine state special education directors.

Survey of LEA and SELPA administrators: In February, the workgroup surveyed LEA and SELPA administrators to gauge which IEP templates and systems they are currently using and their level of satisfaction with them, benefits and limitations of the IEP template they use, and their perspectives about a statewide IEP template and potential statewide IEP system. The survey received 255 responses including 57 SELPA responses and 128 LEA Special Education Director responses.

Survey of family members of students with IEPs: In April, the workgroup surveyed family members of students with IEPs to gather perspectives on the IEP process and document, including what they find most and least helpful about the IEP process and document. The survey received 59 responses including family members of at least one student at every age from 3 years old to 19 years old.

Survey of teachers, school administrators, and special education service providers: Alongside the survey of family members of students with IEP, the workgroup surveyed teachers, administrators, and service providers in April to better understand their experiences and perspectives related to the IEP process, templates, and systems. A total of 430 respondents completed this survey.

Surveys were administered online through either Google Forms or SurveyMonkey. The questions for each survey instruments are provided in appendix D. Key takeaways from each survey are summarized in section 8.B.

7.C. *Recommendation and Template Development*

Over the course of the monthly and additional meetings described above, and through an iterative process to review and provide feedback on drafts, the workgroup collaboratively produced the recommendations and statewide IEP template. This work was directly guided by the workgroup's legislative charge, the vision that the workgroup developed during its first meeting, the literature reviewed, and resources that workgroup members presented to the workgroup.

7.D.   Additional Stakeholder Engagement

A number of presentations and facilitated discussions were held with key stakeholder groups, including:

- Presentations to the California Advisory Commission on Special Education (ACSE): in April (4/21) to share and receive feedback on the workgroup's preliminary priorities and directions, and in August (8/18) to share draft recommendations and key portions of the draft statewide IEP template.
- Focus groups in June (6/3 and 6/7) with two California Teachers Association (CTA) councils
- A public webinar in June (6/7) to share work to date
- Presentation to the State SELPA Association membership in June (6/11) of the emerging workgroup recommendations
- A public survey in August to raise awareness of and gather broad perceptions on the potential benefits of the proposed statewide IEP template. 280 stakeholders including parents, guardians, and family members of students with a disability; special and general education teachers; SELPA,LEA, and state agency staff; school administrators; and school psychologists responded. There was broad agreement from respondents that the draft template met the established goals. Respondents appreciated the streamlined and more student-centered template, while noting that some elements, particularly those required by state or federal regulations, are not as student-centered as others. Respondents also agreed with the need for accompanying guidance and to support the engagement of general education teachers in the IEP process.

8. Data that Informed the Recommendations and IEP Template Design

8.A. Data About Students with IEPs in California

Data about students with disabilities in California provided essential context for workgroup discussions and planning efforts. As demonstrated in figure 2, between the 2014-15 and 2020-21 school years, the number of K-12 students with IEPs increased by 16.75 percent, from 641,798 to 749,295 while the total number of K-12 students remained relatively stable (decreased by 3.74 percent from 6.2 million to 6 million.). The increase in both the number and proportion of students with IEPs confirms the importance of examining how the state and LEAs can best administer special education programs.

Figure 2. California public education enrollment data including for students with IEPs (DataQuest).

Year	Total Statewide Enrollment (percent change from previous year)	Total Enrollment of Students with IEPs (percent change from previous year)	Percent of Total Enrollment with IEPs
2020-21	6,002,523 (-2.60%)	749,295 (+3.90%)	12.48%
2019-20	6,163,001 (-0.38%)	721,198 (-0.58%)	11.70%
2018-19	6,186,278 (-0.55%)	725,412 (+3.05%)	11.73%
2017-18	6,220,413 (-0.13%)	703,977 (+3.60%)	11.32%
2016-17	6,228,235 (+0.02%)	679,525 (+11.16%)	10.91%
2015-16	6,226,737 (-0.14%)	611,293 (-4.75%)	9.82%

Year	Total Statewide Enrollment (percent change from previous year)	Total Enrollment of Students with IEPs (percent change from previous year)	Percent of Total Enrollment with IEPs
2014-15	6,235,520	641,798	10.29%

The workgroup also looked to IDEA Part B indicator data provided in California's State Performance Plan/Annual Performance Report to provide overall context, including:

- Indicator 4 regarding rates of suspension and expulsion

- Indicators 5 and 6 related to Least Restrictive Environment (LRE)

- Indicators 9 and 10 about disproportionality

- Indicator 13 on transition planning in support of post-secondary goals

- Indicator 14 about post-school employment and postsecondary education outcomes

The workgroup found LRE and post-school outcome data to be very relevant to its charge and agreed that the IEP process plays a substantial role in making placement and services decisions, and indirectly influences the experiences of students with IEPs including suspension and expulsion rates. LRE data is included in figure 3. California can use the IEP template to communicate the priorities of inclusive practice and encourage IEP teams to appropriately backwards map from post-school outcome when developing the IEP goals and services.

Figure 3. California's LRE data as reported in its February 1, 2021, APR (CDE, 2021).

School Year	Percent of children with IEPs aged 6 through 21 served inside the regular class 80% or more of the day	Percent of children with IEPs aged 6 through 21 served inside the regular class less than 40% of the day	Percent of children with IEPs aged 6 through 21 served in a separate setting.
2019-20	58.38%	18.21%	3.19%
2018-19	56.88%	19.54%	3.10%
2017-18	56.10%	19.82%	3.40%
2016-17	54.92%	20.70%	3.56%
2015-16	54.07%	21.54%	3.63%
2014-15	53.38%	22.01%	3.31%

While California's LRE data are slowly improving, they continue to lag far behind the national averages for LRE. For the 2019-20 school year, national data show that 66.3% of students with IEPs were included in the regular class for 80% or more of the day and only 12.9% of students were included less than 40% of the day (ED, 2021).

8.B.   Stakeholder Perspectives and Input

As described in section 7, in addition to relying on the experiences and expertise of the workgroup itself to inform the recommendations and template, the workgroup conducted multiple stakeholder surveys, the results of which were reviewed and discussed during workgroup meetings to directly inform the workgroup's recommendations and design of the statewide IEP template. Survey questions are provided in appendix D. Key takeaways from the stakeholder surveys are described below.

SELPA and LEA survey respondents generally indicated satisfaction with the IEP templates and systems they currently use, with many comments that they present no barriers to meaningful participation by all IEP team members.

- 76 percent of SELPA and LEA respondents were satisfied or very satisfied with their current IEP template. However, respondents did identify some limitations of their templates such as lack of multiple language support, redundancy of template sections, and confusing order and organization.
- Respondents indicated openness to a statewide IEP template with 84 percent indicating they were neutral, likely, or very likely to adopt an optional statewide template.
- Respondents noted some particularly helpful features of their current systems, including the ability to run reports, ability to bring in content from past IEPs, acceptance of digital signatures, and ability to communicate with local student information systems.
- Respondents indicated openness to a state-provided and state-funded online IEP system with 90 percent neutral or likely to adopt such a system. However, many of the open-ended comments specified openness only to adopting such a system if it was the system currently in place at the LEA.

Family members of children with IEPs shared their experiences, identified significant concerns with, and made recommendations for improving the IEP template and process.

- Most family member survey respondents indicated that they feel welcomed and included at their child's IEP meeting, understand their role during the IEP meeting, and know their child's IEP goals.

- More than half of families indicated that their child's IEP is focused on their weaknesses or deficits and that they did not understand how their child's IEP goals are connected to the California Common Core Standards.

- When asked about parts of the template that are most useful and clear, family member survey respondents most commonly identified the goals. Goals and goal setting were also identified as one of the most confusing sections, along with assessment sections, and jargon and confusing language throughout the template.

- Family member survey respondents offered a number of suggestions for improving the IEP template, including:
  - Adjust language to be more understandable for students and family members
  - Streamline the IEP template to make it clearer and more concise
  - Make the IEP more child-focused and strengths-focused
  - Add more open-ended fields to the IEP to allow for individualization

- Suggestions for improving the IEP process included:
  - Share information with families in advance of the meeting
  - Adopt a child-centered focus
  - Provide a menu of service options
  - Extend the meeting length

- Increase student voice

General education teachers, special education teachers, and school administrators shared their experiences, perspectives, and recommendations regarding the IEP template and process, as well as related training they have completed.

- Survey results revealed some substantial differences between the special education teacher respondents and general education teacher respondents.
  - Only 50 percent of general education teachers indicated they could easily access the IEP for the students with disabilities they serve compared to 98 percent of special education teachers.
  - Only 11 percent of general education teachers reported they attend at least one professional development session addressing the IEP process each school year compared to 42 percent of special education teachers.
  - Similarly, more special education teacher respondents (82 percent) indicated they feel safe sharing their opinion about the content of the IEP compared to general education teacher respondents (42 percent).
- Across all teachers and school administrators, 45 percent responded neutrally about whether parents find the IEP to be a useful tool, suggesting a need for more and deeper family partnership.
- Only 35 percent of all respondents indicated that they meet with parents prior to the IEP meeting to review what will be discussed during the meeting.
- Respondents' suggestions for improving the IEP template included:
  - Revise the IEP template to use more approachable language and add a glossary of terms and acronyms

- o Make the template shorter

- o Add descriptions of each section and question

- o Add an analysis of the extent to which prior year goals were attained

- o Add space to indicate non-academic interests and motivations

- o Emphasize student strengths

- o Better document services

- o Make forms available in multiple languages

- Suggestions for improving the IEP process included:

  - o Make IEPs more student-focused and strengths-based

  - o Engage parents and caregivers in advance of IEP meetings

  - o Have a neutral facilitator

  - o Remove pressure and concern about legal implications of what is said during IEP meetings

8.C. Additional Data and Examples That Informed the Workgroup

As described in Section 7, the workgroup looked closely at IEP templates, systems, processes, and requirements in California and other states across the country.

Of the 50 states, including California:

- 44 states have published a statewide IEP template on their state education agency websites with varying amounts of guidance to support the IEP templates

- 23 states require use of the statewide IEP template

- 21 states provide an online system for developing IEPs and collecting IEP data

A table including this information, by state, and links to each state's statewide template is provided in appendix C.

While fewer than half of states (23 states) require use of a statewide IEP template, most states (44 states) have published a model or sample IEP template and have encouraged LEAs to use the statewide template through the provision of extensive guidance and technical assistance resources that are based on the state's IEP template. The benefits of a statewide IEP template, as reported on state websites and in interviews with state directors of special education include streamlined monitoring processes, increased transferability of IEPs between LEAs, and ease in providing technical assistance and guidance to LEAs and to families. States with optional IEP templates do not see the same benefits as those where IEP templates are required related to streamlined monitoring.

An increasing number of states are providing statewide online IEP systems for LEAs. While most of the 21 states providing online IEP systems provide them at no cost to LEAs, states without additional funding specifically for the purpose of an online IEP system have used funds that would have been otherwise available for technical assistance or discretionary grants to fund these online systems. States have encouraged LEAs to participate in online systems by demonstrating how state compliance monitoring is streamlined and by providing incentive grants for LEAs to train staff and become trainers for other LEAs. Among states for which this information is available, about half have developed in-house IEP systems and half have contracted with vendors for IEP systems. In both cases, LEAs have been provided the option to

purchase their own online IEP system and provide data to be uploaded into the state system to allow for state monitoring and reporting on various indicators.

Importantly, most states that have developed or contracted for the development of a statewide online IEP system also have a statewide student information system. States reported in interviews that the interaction between the statewide student information system and the online IEP system is critical for encouraging adoption in local school systems and for streamlining data reviews at the state level. Interaction with the student information system allows the state to examine statewide trends related to referrals and eligibility determinations as well as to track students who leave and re-enter special education, including in different LEAs.

The workgroup regularly referenced state and federal laws (California Education Code, IDEA, and ESSA) to clarify local and state requirements and ensure that the workgroup's recommendations, including the proposed statewide IEP template, align with and ensure IEPs are compliant with state and federal law.

To help the workgroup better understand how the CDE reviews IEPs for compliance and to determine whether IEPs are written to ensure improved academic and functional student outcomes, CDE staff presented to the workgroup on the process for reviewing IEPs to determine whether they are developed to provide educational benefit and that their monitoring process has shifted to include the examination of a student's IEPs over multiple years to examine how the goals and services change over time to meet the needs of the student, particularly when the student does not meet their IEP goals.

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Finally, in addition to bringing their expertise, experience, and thought partnership to meetings and other activities, workgroup members shared a wealth of informational resources, example tools, and other materials related to the workgroup's charge and vision. These resources were compiled in a shared folder that all workgroup members had access to and referenced during workgroup meetings and especially during the development of the statewide IEP template and crafting of recommendations related to training for IEP team members. These resources can be made available to the CDE and its technical assistance providers upon request.

9. Recommendations in Response to the Workgroup's Legislative Charge

In response to its charge, the workgroup developed 25 recommendations to improve the IEP process in California and ensure that IEPs are designed to improve student outcomes, capture student needs, and inform learning strategies that support instruction that is aligned to state standards and provided in the general education setting whenever possible. The recommendations reflect special education research as summarized in this report and respond to data about California's students with IEPs and their outcomes. The workgroup's recommendations are organized by legislative charge (see section 3) and context is provided for each set of recommendations.

It is important to note that the recommendations are not interdependent. That is, some recommendations may be adopted even if all recommendations are not adopted. This is especially true for the recommended training and resources on the IEP process. Those

recommendations may be adopted whether or not the state adopts and requires use of the proposed statewide IEP template

Each recommendation includes specific actions to be taken by the CDE, the State Board of Education, the California State Legislature, and other state agencies responsible for the governance of California's public education system. Recommended state actions are classified into the following types, notated with the corresponding icons:

- **Policy change.** Revision to existing policy or development of new policy (i.e., changes to Education Code or State Board of Education policy).

- **Allocation of funds.** Direction for the use of funding by the California State Legislature, State Board of Education, or the CDE.

- **Administrative action.** Developing and issuing guidance, disseminating materials, etc.

Timeline considerations for the complete set of recommendations are included in appendix E.

9.A. *IEP Process. Recommendations to ensure the IEP development and periodic review processes are designed to improve student outcomes by*

capturing student strengths, needs, and informing learning strategies that support instruction aligned to state standards.

Context

The workgroup members strongly agreed that the necessary changes to the IEP process to meet the vision of a student-focused, strength-driven IEP that is aligned to state standards will require a shift in mindset for many members of IEP teams and public education leaders about the role of IEPs in the general education system. Significant work is needed to build the capacity of general education administrators and teachers to take leadership in improving outcomes for students with IEPs as part of the general education system.

The workgroup agreed that a statewide IEP template is a potential catalyst for a shift in mindset. The workgroup also agreed that a change in mindset and in practice will require extensive training, at all levels of the education system, on best practices for student-focused, strengths-driven IEPs that increase inclusion in the general education setting and access to the general education curriculum. The workgroup also recognized the particular importance of providing training to administrators including the LEA designees assigned to attend IEP meetings. As found in the research, workgroup members confirmed that this IEP team member often sets the tone for the IEP. If the administrator does not prioritize active parent/guardian and general education participation and is more focused on the cost of services or compliance, they can be a barrier to parent/guardian and teacher input.

One barrier to more meaningful IEP discussions about increasing access to general education settings and curriculum identified by the workgroup is the lack of clear

assignment of every student with an IEP to at least one general education classroom. While some LEAs have procedures for assigning every student to at least one general education classroom, that practice is neither required nor consistent across the state. The workgroup believes that participation of the student's general education teacher — meaning, for students not currently assigned a general education teacher, the teacher in a class the student would be attending if they did not have an IEP — is essential to determine the supports that are needed for increasing time in the general education setting.

IEP Process Recommendation 1

The workgroup recommends the CDE, directly and through technical assistance providers and System of Support[2] leads, **develop and disseminate clear guidance encouraging LEAs[3] and IEP team members[4] to adopt best practices for active participation in a student-focused, strengths-driven IEP process** designed to improve meaningful access to the general education setting and curriculum and improve outcomes for all students with IEPs.

Type of action: Administrative action

[2] See https://www.cde.ca.gov/sp/sw/t1/csss.asp for information about California's System of Support including the various types of Lead Agencies.

[3] For the purpose of this report, LEAs include school districts, charter schools, and, in limited circumstances, County Offices of Education that are responsible for developing and implementing IEPs for eligible students.

[4] For the purpose of this report, in accordance with IDEA, IEP team members include students, families/guardians, teachers (general and special education), providers (including interagency partners), and school and LEA administrators and administrative designees.

a. Communicate why and how the state is prioritizing changes to the IEP process (e.g., the actions the state is taking based on these recommendations).

b. Clearly and regularly update the CDE website to include current guidance and recommended resources related to the IEP process and the statewide IEP template, if adopted.

c. Recognize, highlight, and disseminate case studies, resources, tools, and other examples of best practices that have resulted in a more student-focused, strengths-driven IEP process as reported by LEAs and as identified through the Statewide System of Support and through CDE monitoring activities.

d. Review and adjust, if needed, monitoring and technical assistance materials and activities to ensure they are designed to encourage a student-focused, strengths-driven IEP process. This includes continuing to review IEPs over time to examine educational benefit and reviewing and providing technical assistance on not only the IEP document, but the IEP process. This can be done through prioritizing specific requirements of IDEA, such as more closely reviewing each team member's participation in the IEP process and evaluating implementation of IEPs in the general education setting.

IEP Process Recommendation 2

The workgroup recommends the CDE increase engagement with, and guidance and training for, LEAs and school site staff around the requirement to **ensure the active participation of each student's general education teacher in the IEP process**, and particularly in placement decisions, in order to increase the provision of special education and related services in the general education setting.

Type of action: Administrative action

a. Consistent with California Education Code,[5] regularly communicate, through formal guidance and monitoring of LEA procedures and practices and student IEPs, that the active participation of the student's general education teacher in the IEP process is not only legally required, but also integral to determining how each student can more fully participate in general education.

b. Communicate the expectation that every student with an IEP may participate in general education.

c. Provide guidance to the field that every student attending a public school where there are general education settings should be enrolled in a general education class at their grade level and assigned at least one general education teacher.

d. For students not currently attending a public school with general education classrooms (e.g., in segregated or nonpublic settings), encourage LEAs and school site staff to prioritize the meaningful participation of a general education

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[5] As specified in section 56341(b)(2):

> Not less than one regular education teacher of the pupil, if the pupil is, or may be, participating in the regular education environment. If more than one regular education teacher is providing instructional services to the individual with exceptional needs, one regular education teacher may be designated by the local educational agency to represent the others.

> The regular education teacher of an individual with exceptional needs, to the extent appropriate, shall participate in the development, review, and revision of the pupil's individualized education program, including assisting in the determination of appropriate positive behavioral interventions and supports, and other strategies for the pupil, and the determination of supplementary aids and services, program modifications, and supports for school personnel that will be provided for the pupil, consistent with Section 1414(d)(1)(A)(i)(IV) of Title 20 of the United States Code.

teacher in the determination of the necessary supports and services to increase participation in general education. Whenever possible, encourage IEP meeting participation of a general education teacher whose class the student would be participating in if they were participating in a grade-level general education class in their neighborhood school.

e. When one general education teacher is selected to represent multiple teachers who provide instruction to a student at an IEP meeting, encourage LEAs and school site staff to invite the general education teacher who can most fully participate in the discussion of the supports and services the student needs to access the grade-level general education curriculum, which is most often a teacher providing instruction in a core academic subject. Encourage LEAs and school site staff to request input from each of the student's general education teachers prior to each IEP meeting. (See also IEP Process Recommendation 3 below.)

f. Disseminate examples of best practices implemented by LEAs to increase active participation of general education teachers including examples of how LEAs assign general education teachers to every enrolled student (e.g., based on their school of residence or automatically through the student information system) and how general education teachers lead IEP meeting discussions about the supports and services that can be provided in their classrooms. Provide guidance encouraging consideration of the full range of supports and services available to promote access to general education.

IEP Process Recommendation 3

The workgroup recommends the California State Legislature revise California Education Code Section 56341.5 to require LEAs to **promote active engagement in a student-focused, strengths-driven process by eliciting input prior to any IEP meeting from the student, family/guardians, teachers, providers, and case managers.** LEAs may use a locally determined process to elicit input that considers the ways families/guardians prefer to interact with schools (e.g., a survey distributed with the notice of meeting, interviews by parent liaisons, phone calls).

Types of actions: Policy change, allocation of funds, administrative action

a. Define pre-meeting input to not be a pre-determination of the free and appropriate education to be defined in the IEP and to include information about:

   i. The student's strengths

   ii. Each team member's hopes and expectations for the student and the IEP

b. Direct CDE to monitor, when reviewing IEPs as part of its regular monitoring activities, whether LEAs elicited and provided a mechanism for IEP team members to provide input, using culturally and linguistically responsive approaches, but not whether IEP team members provided input. An LEA should not be found out of compliance if the team member chooses not to provide input.

c. Allocate funds for technical assistance to LEAs on eliciting input and helping families and other team members prepare to participate in the IEP process.

The workgroup recommends the California State Legislature and CDE fund and build capacity, through CDE, the Statewide System of Support, and technical assistance contractors for the **ongoing development and dissemination of resources and training to build and sustain the capacity of each IEP team member to actively participate in a student-focused, strengths-driven IEP process** designed to improve meaningful access to the general education setting and curriculum, and outcomes, for all students with disabilities. This training should be provided in advance of, during, and after implementation of the statewide IEP template.

Types of actions: Policy change, allocation of funds, administrative action

a. Allocate funds to CDE for the development, or the oversight of a contract for the development of, at a minimum, the following types of resources and support, individualized as needed for each type of IEP team member (students, families/guardians, teachers (general, special education, and pre-service), providers (including interagency partners), and school and LEA administrators and administrative designees):

    i. Student-focused, strengths-based IEP guides including one-page process overviews

    ii. Interactive modules including multimedia examples of student-focused, strengths-based IEP meetings

    iii. Strengths-based IEP meeting agendas and standards-based progress reporting templates

iv. Process guide and decision tree for making placement decisions that considers all available supports in general education settings

v. Sample tools to support the student-focused IEP process (e.g., checklists, templates for gathering and sharing information including pre-meeting input documents)

vi. IEP meeting facilitation materials (e.g., scripts)

b. Consider how resources can be created as part of and incorporated into the universal, or Tier 1, supports currently provided by Statewide System of Support Leads including COE Content Leads, SELPA Improvement Leads, Geo Leads, Community Family Engagement Leads, Equity Leads, and English Learner (EL) Leads, as well as family support organizations including Parent Training and Information Centers, (PTIs) Family Empowerment Centers (FECs), and Family Resource Centers (FRCs). Leverage the Statewide System of Support Geo Leads and COEs to widely disseminate and promote the use of resources related to the IEP process and template in order to: model inclusive practices by coordinating across general and special education, gain buy-in from and shift the mindset of all teachers and administrators, increase meaningful inclusion of students with disabilities, and improve experiences and outcomes for all students.

c. To further build the capacity of all IEP team members to develop IEPs that will lead to increased inclusion and improved outcomes, provide funding for and encourage new and existing Statewide System of Support leads and CDE technical assistance providers funded by IDEA funds to develop and provide

training on topics including, but not limited to: person-centered planning, disability and countering ableism, self-determination, holding students to high expectations and the soft bigotry of low expectations, meaningful post-secondary outcomes including how students with disabilities can prepare to earn a family-sustaining wage, and the intersectionality of disability, race, and poverty. This training should be provided by System of Support leads to all administrators, educators, and service providers, not only to special education professionals. Responsibility for training could initially be assigned to existing Content Leads and then explicitly included in the scope of work for future leads.

d. Require, through contracts or other agreements, that any future resources and supports developed or funded by the state related to the IEP process are student-focused, strengths-based, supported by evidence, and actionable. Review existing resources and supports posted on CDE's website or otherwise provided to LEAs and discontinue the promotion of resources that do not meet this expectation.

e. Provide state-developed or state-funded resources and supports for families/guardians in at least the five most common languages spoken by California students, in as many languages as needed when possible, written in plain language[6], and using images to support comprehension.

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[6] Plain language, as defined by the Plain Writing Act of 2010, is "writing that is clear, concise, well-organized, and follows other best practices appropriate to the subject or field and intended audience." Resources on plain language are available online at https://www.plainlanguage.gov/.

9.B.   IEP Template. Recommendations for a statewide IEP template that provides information about student strengths, needs, and learning strategies. The workgroup has designed a template. Successful implementation, leading to improved outcomes for students with IEPs, will be dependent on the IEP process recommendations in section 9.A to provide ongoing guidance, training, resources, and support.

Context

The workgroup considered the benefits and drawbacks of requiring a statewide IEP template versus providing a model form and encouraging LEAs to use the form. Ultimately, the workgroup concluded that in order to realize the benefits of a statewide IEP template including creating consistency and transparency for students and families/guardians and to streamline IEP administration, specifically transfers between LEAs, the statewide IEP template should be required. Requiring a statewide IEP template sets a common expectation and will reduce potential duplication of efforts for training and for state monitoring activities. Currently, many SELPAs and LEAs have created trainings on the IEP process that, if there were a common IEP template, could be scaled up and used throughout the state.

It is important to note that the workgroup's charge was limited to the template for IEP development and the periodic review process and did not include other special education templates including those for providing prior written notice to families of proposed actions related to the IEP and documenting initial and recurring eligibility determinations. While some current IEP templates used by California LEAs include that information, it is not required for the IEP template and the workgroup prioritized

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information for inclusion in the template that would be most useful and current for the benefit of teachers, the student, and the parents/guardians.

The proposed statewide IEP template developed by the workgroup is provided in appendix F. The template in Appendix F includes: (1) the IEP information applicable to all California students with IEPs as well as detail provided in expanded sections that will apply to only a subset of students with IEPs and (2) samples showing the recommended sections of the template for inclusion in IEP summaries for general education teachers, for parents/guardians, and for use during emergency closures (see Emergency Conditions IEP Recommendation 2). The template also includes references the IDEA and Ed Code citations that justify each element of the template, supplemented by appendix G which provides the IEP content requirements from IDEA and Ed Code, cross walked to the sections of the proposed template that the workgroup proposes meet each requirement.

Please note that the statewide IEP template captures the recommendations of the workgroup. However, final implementation and adaptation will be completed by the CDE.

IEP Template Recommendation 1

The workgroup recommends the California State Legislature, over time, require LEAs to use the statewide IEP template (see appendix F) to create consistency and transparency for students and families/guardians; ensure consistent guidance, resources, and support; and streamline monitoring and technical assistance activities.

Types of actions: Policy change, allocation of funds
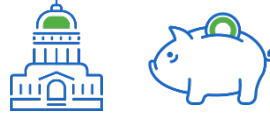
a. Allow LEAs to add additional pages to the template but not to remove or modify existing content in order to maintain integrity of the template and not compromise the workgroup's vision. Direct CDE to not consider information outside of the required template to establish compliance and advise CDE to review any pages or forms added by an LEA when it reviews that LEA's IEPs to ensure the additions do not conflict with or detract from the vision of the student-centered, strengths-driven statewide IEP template.

b. Support statewide IEP template implementation with one-time funds for the necessary modification of locally determined online IEP systems to adapt to using the statewide IEP template.

IEP Template Recommendation 2

The workgroup recommends the CDE support LEAs to transition to the statewide template in multiple phases over six years, leading to full implementation of the statewide IEP template by the 2027-28 school year.

Types of actions: Policy change, allocation of funds, administrative action

a. In year 1 (2022-23), develop guidance on the IEP process and template (see IEP Process Recommendation 1) and contract for the development of training and resources for the proposed IEP process (see IEP Process Recommendation 4) and template.

b. In year 2 (2023–24), directly or through contracted agencies or Statewide System of Support Lead Agencies, begin statewide training on the proposed IEP process and template. Recruit pilot sites to begin using the new IEP template in the 2023–24 school year and transition to using the template for all students in 2024–25. Make the proposed IEP template available in the top five languages spoken by California families/guardians, including in the most needed languages for pilot sites. Continue training throughout the implementation of the template.

c. In year 3 (2024–25), pilot the template for all students with IEPs in 10 LEAs of different sizes that voluntarily participate and receive ongoing training and technical assistance. Collect ongoing feedback from pilot LEAs, incorporate the feedback, and modify the template and training materials as needed.

d. In year 4 (2025–26), publish the final statewide IEP template and provide training and supports to all LEAs in the state through Statewide System of Support Lead Agencies.

e. Aim for full implementation (every IEP) by year 6 (2027–28). This will allow LEAs time to transition to the statewide IEP template and implement the resources and support described in IEP Process Recommendation 4.

IEP Template Recommendation 3

The workgroup recommends the State Board of Education and CDE establish a Statewide IEP Advisory Board or assign the Advisory Commission on Special Education (ACSE) to receive updates and provide input on the implementation of the IEP template and changes to the IEP process.

Types of actions: Allocation of funds, administrative action

a. The Statewide IEP Advisory Board should include students; families/guardians (including PTIs/FECs/FRCs); teachers (general and special education); service providers (including school psychologists, other related service providers, providers that serve students with low incidence disabilities including deafness and visual impairments, and interagency partners); school, LEA, COE, and SELPA administrators; and representatives from institutions of higher education. The Advisory Board should regularly report to the CDE, the State Board of Education, Department of Finance, Legislative Analyst's Office, and the California State Legislature.

b. Allocate funds to support the Advisory Board and CDE administrative support for the Advisory Board.

c. Initially, task the Advisory Board with providing input on the training developed by the state (see IEP Process Recommendation 4), reviewing data and feedback from LEAs piloting the statewide IEP template (see IEP Template Recommendation 2) to evaluate the need for additional supports, revising the template, and revising the statewide IEP template implementation plan.

d. Following the gradual implementation of the statewide IEP template, assign the Advisory Board to receive feedback on the IEP template and recommend revisions to the template in response to feedback or changes to federal or state law.

IEP Template Recommendation 4

The workgroup recommends the California State Legislature direct the California Commission on Teacher Credentialing (CTC) to revise (as needed) credential requirements to **ensure newly credentialed general and special education teachers and administrators are trained in using the statewide IEP template; prepared to actively participate in a student-centered, strengths-driven IEP process;** and prepared to support and accommodate all students with IEPs in general education settings, as appropriate. This may not require a change to credentialing requirements, but to coursework expectations and accreditation reviews.

Type of action: Policy change

a. Encourage LEAs to leverage partnerships with institutions of higher education to develop training on the IEP process and template that can be used for both pre-service and in-service professional development.

9.C.   Recommended IEP Design Elements

Context

The workgroup's proposed statewide IEP template is included in appendix F. The recommendations below describe aspects of the template that represent the greatest change from current commonly-used templates across California and the highest priorities of the workgroup. **These recommendations do not require additional policy change, allocation of funding, or administrative action beyond requiring use of the statewide IEP template (IEP Template Recommendation 1) and associated recommendations above**. If the state does not require use of the IEP

template, it should consider whether there are separate actions to be taken that can meet the intention of the workgroup, such as requiring each LEA to include specific content in its IEP template.

While the workgroup agreed on these recommendations, some workgroup members expressed concerns about not including information that, while not required, has traditionally been included in the IEP related to the child's disability category and the formal evaluation data used to establish their eligibility for special education services. Ultimately, the workgroup agreed that goals, instructional strategies, and most importantly placement decisions should not be made based on disability category and that the information about how the child was determined to be eligible can be stored in the documentation of eligibility evaluations and reevaluations. If the IEP team agrees that formal evaluation data is important to inform the present levels of performance and IEP goals, it should be included in the present levels of performance section of the IEP and could be included in the summary of the student's learning needs and priorities in section 1 of the proposed statewide IEP template.

IEP Design Recommendation 1

In order to shorten the document and make it more usable for families, teachers, and providers, **remove information from the annual IEP document that is not required for the purpose of an annual IEP** including demographic data and the data used to establish and reestablish eligibility for special education services. Maintain and update demographic data through the student information system and document eligibility details separately from the annual IEP template.

IEP Design Recommendation 2

To set the tone for a student-driven, strengths-based IEP, **record each student's strengths, interests, learning and communication preferences, and self-determined plan in the first section of the IEP.** See section 1 of the proposed Statewide IEP Template (appendix F).

IEP Design Recommendation 3

Begin the IEP with statements of the student and family/guardian's vision for the future and a projected date of graduation with a high school diploma to establish high expectations and the ability to backwards map content in later sections to these statements. See section 2 of the proposed Statewide IEP Template (appendix F).

IEP Design Recommendation 4

To encourage coordination and collaboration, **add a section to describe the other support services students are receiving** at school outside of special education, and outside of school. See section 6d of the proposed Statewide IEP Template (appendix F).

IEP Design Recommendation 5

Create dedicated sections for: 1) academic needs, and 2) communication, social-emotional, functional, and behavioral needs to ensure IEP teams consider each type of need that must include present levels of performance and goals in relation to the student's needs. See separate sections of section 4 of the proposed Statewide IEP Template (appendix F).

IEP Design Recommendation 6

Record specific instructional strategies that can be used, including in the general education setting by the general education teacher(s), to support the student to make progress toward their academic, communication, social-emotional, functional, behavioral, and secondary transition goals. See section 4c of the proposed Statewide IEP Template (appendix F).

IEP Design Recommendation 7

Record how the IEP team will engage and support the family, including strategies to help the family support the student to make progress toward goals through actions they might implement at home for the academic, communication, social-emotional, functional, and behavioral, and secondary transition focus areas. See section 4d of the proposed Statewide IEP Template (appendix F).

IEP Design Recommendation 8

Encourage more complete consideration of removal from general education and planning for increased inclusion by requiring justifications not only for the overall placement of a student outside of the general education setting, but also for when students will not participate in nonacademic and extracurricular activities and for each service that cannot be provided in the general education setting. See sections 5 and 7 of the proposed Statewide IEP Template (appendix F).

9.D. IEP Transitions. Recommendations to support transition planning with early learning and postsecondary options.

The workgroup recognized the need for the IEP template to specifically and explicitly document transition planning for the many transitions that occur throughout a child's entire public education experience and not only the formal transitions of entering and exiting school-age special education services. This includes documenting supports needed as students transition to spending more time in general education, as appropriate. The workgroup also recognized that secondary transition planning is often focused on the goals for the student after they have exited school and neglects to focus on the needed transition supports to finish school and achieve the goal of receiving a high school diploma.

These recommendations also reflect the work of and preliminary findings from the workgroup examining the transition from Part C early intervention to Part B school age special education (established by the California Budget Act of 2019, SB 75) and the work completed by the Alternative Pathways to a High School Diploma Workgroup (established by the California Budget Act of 2020 and conducted concurrent to the Statewide IEP Workgroup). The IEP template can help establish the expectation that every student can earn a high school diploma and communicate that expectation to families/guardians and teachers. The IEP team plays a substantial role in planning each student's pathway to a diploma.

The recommendation to move the required transition planning age from 16 to 14 was not a unanimous recommendation of the workgroup. Some members expressed

concern that this would create additional burden for teachers and case managers. However, most U.S. states and territories (29 of 56) begin transition planning at age 14 and research studies demonstrate benefit for students (Suk, Martin, Mcconnell & Biles, 2020). Ultimately the significant majority of the workgroup supported the recommendation.

As with the IEP Design Recommendations (section 9.C), the first two recommendations in this section do not require additional action beyond requiring use of the statewide IEP template (IEP Template Recommendation 1). If the state does not require the IEP template, these recommendations may require separate, distinct actions.

IEP Transitions Recommendation 1

By requiring use of the statewide IEP template, the workgroup recommends that the California State Legislature ensure that IEP teams **identify the student's readiness for, and strengths related to many types of transitions in the IEP. IEP teams will be required to document the supports related to these critical transitions** to be provided to the student, family/guardians, teachers, and providers as outlined in section 2 of the statewide IEP template designed by the workgroup (see appendix F).

    a. Transitions to be considered by the IEP team and documented in the IEP, with any needed supports and services, include:

        i. To postsecondary activities (competitive employment, postsecondary education, and independent living)

        ii. From Part C early intervention to Part B school age special education

        iii. To more time in the general education environment

iv.   Between preschool, elementary, middle, and high school

v.   From a nonpublic or other setting to the LEA

vi.   Between distance, in-person, and hybrid learning

vii.   Other (e.g., transition to using new technology, transition to new staff)

IEP Transitions Recommendation 2

By requiring use of the IEP template, the workgroup recommends the California State Legislature **promote a student-centered IEP that backwards maps from long term goals as early as possible**, as outlined in Sections 2, 5, 6, and 7 of the statewide IEP template designed by the workgroup (see appendix F).

a.   The optional prompts in the statewide IEP template encourage IEP teams to begin conversations about the student's pathway to a high school diploma and post-school planning as early as preschool, or during the student's first IEP.

IEP Transitions Recommendation 3

The workgroup recommends the California State Legislature revise California Education Code Sections 56043(g) and 56345(a)(8) to **adjust the required age for postsecondary transition planning from 16 to 14.** Require IEP teams to begin formal post-secondary planning including setting measurable post-school outcome measures no later than at the first IEP meeting following the student's 14th birthday. IEP teams may develop a secondary transition plan prior to the student turning 14. This is consistent with California Education Code Section 56460(e) that "planning for transition from school to postsecondary environments should begin in the school system well

before the student leaves the system." Corresponding changes will be required to California Education Code Sections 56043(e) and 56341.5(e).

Type of action: Policy change

IEP Transitions Recommendation 4

Consistent with the SB 75 Part C to Part B Transition Workgroup's preliminary recommendations, the workgroup recommends that the California State Legislature revise California Education Code Section 56341(i) to **require participation of the child's Part C service coordinator or Part C service provider in the first IEP meeting for a three-year-old child transitioning to preschool.** Currently, federal and state law require the invitation of the service coordinator at the request of the parent/guardian; this change would require the LEA to invite the service coordinator unless the parent/guardian requests that they not be invited.

A corresponding change will be required to California Education Code Section 56341.5 (e).

Type of action: Policy change

9.E.   *Online IEP System. Recommendations resulting from the workgroup's assessment of the feasibility of a web-based statewide individualized education program system to house a statewide template.*

Context

As described in sections 7 and 8, a number of factors were used by the workgroup to evaluate the feasibility of the implementation of a web-based a statewide online IEP

system for California. This included the review of other states' IEP systems and information from LEA and SELPA administrators about their satisfaction with the systems they currently use and the embeddedness of the current systems within local student information systems. Most states that offer a statewide web-based IEP system developed that system around a statewide IEP template that was already established, providing a rationale for delaying any potential development of a statewide online IEP system for California.

In addition, most states that have developed or contracted for the development of a statewide online IEP system also have a statewide student information system which allows for greater feasibility of and benefits to development of a statewide online IEP system. The lack of a statewide student information system is another consideration for feasibility. The workgroup briefly discussed the California Cradle to Career data system as another element that should be more fully explored before developing another statewide student-level data system to house an IEP template.

The workgroup, through review of other states' systems and interviews with state special education directors, also evaluated the potential fiscal and human resources needed to develop and maintain a statewide web-based IEP system including the capacities that will be needed at CDE to maintain the system and review data in the system. The state could be taking ownership for student-level data that is now district data which has implications for data security and state responsibility for monitoring those data. The cost of IEP systems varies; one state evaluation found costs for operating the IEP system (not including initial development costs) varying between 11 and 30 dollars per student per year (VDOE, 2021), including students who are referred

for special education and not found eligible. This means that California would need to plan to spend between 11 and 30 million dollars per year on a system, plus initial development costs and other associated costs. States that have online systems also recommended considering the capacity of the state to either develop and maintain a web-based system internally or establish a long-term contract with a vendor. Each option has potential benefits and drawbacks, but the most important consideration identified by states was consistency across years.

Given these considerations related to feasibility of implementation, a more thorough investigation should be completed closer to the time the state might be able to implement a system and when there is greater understanding of the intended interaction of that system with the other statewide systems in development.

While there are considerable challenges to development of a statewide online IEP system for California, responses from the surveys conducted by the workgroup (see section 8) identified certain IEP system features or functions that are particularly important for engaging IEP team members (especially parents/guardians and general education teachers). Having reviewed and discussed this information, the workgroup determined it would recommend the state not pursue a statewide online IEP system at this time but as an alternative incentivize and fund the development of certain features or functions within locally funded and administered IEP systems.

Online IEP System Recommendation 1
Given the work needed and projected timeline for adoption of the statewide IEP template, the workgroup recommends the California State Legislature and CDE not

pursue a statewide web-based IEP system to house the statewide template at this time. Given its potential benefits, the workgroup recommends California **reevaluate the feasibility of a web-based IEP system when LEAs have successfully transitioned to the proposed statewide IEP template, following the 2027-28 school year.**

Online IEP System Recommendation 2

The workgroup recommends the CDE continue to use CALPADs to **collect data from each student's IEP**, including data for State Performance Plan and Annual Performance Report (SPP/APR) indicators, and begin to collect additional data from students' IEPs through CALPADS to inform the state's decision-making about meeting the needs of students with IEPs statewide and streamline the state's monitoring procedures.

Types of actions: Administrative action

a. To better understand needs related to increasing access to general education, collect the following fields related to decision-making about student placement from sections 6 and 7 of the IEP template:

   i. From section 6, continue to collect data on all services on a student's IEP including the provider, duration, frequency, and location for each service a child receives.

   ii. From section 7, collect responses to "Will the student attend the school they would attend if not disabled?"

The workgroup recommends that rather than implementing a statewide IEP system at this time, the California State Legislature recommend and provide funding to encourage LEAs to **improve and expand specific IEP system functions** in their locally administered IEP systems. The workgroup recommends LEAs include in their systems:

a. Parent/guardian portal/access that provides access to the most pertinent information for families

b. General education teacher portal/access

c. A summary of the means by which the IEP will be provided under emergency conditions (see also section 9.F Emergency Conditions IEP Recommendations). A sample Emergency Conditions IEP Summary template, consisting of sections of the proposed statewide IEP template, is provided in appendix F.

Types of actions: Policy change, allocation of funds, administrative action
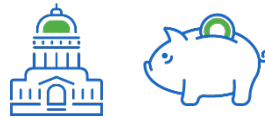
9.F. ***Emergency Conditions IEP. Recommendations for a state standardized addendum to the IEP to address emergency closures and how special education supports and services will be provided in the event of an emergency closure, including best practices recommendations.***

Context

The 2020 Budget Act amended California Education Code Section 56345 to require that IEPs include a description of the means by which the IEP will be provided under emergency conditions, in which instruction or services, or both, cannot be provided to

the pupil either at the school or in person for more than 10 school days. The requirement applies to all initial and subsequent IEPs and the description must be a part of the IEP to which parents provide consent. Given these requirements, the workgroup did not design an addendum, but as described in the following recommendations, designed the template to include these descriptions throughout the IEP.

Similar to earlier recommendations, if the state requires use of the IEP template, these recommendations do not require further action. If the state does not require the statewide IEP template, it should consider whether there are additional actions it could take to promote the priorities described in these recommendations.

Emergency Conditions IEP Recommendation 1

The workgroup recommends the California State Legislature, by requiring use of the IEP template, ensure that each IEP includes a description of the means by which the IEP will be provided under emergency conditions as part of the sections of the IEP documenting annual goals, special education and related services, supplementary aids and services, transition services, and extended school year services. **By including this information throughout the IEP rather than in an addendum, the state will help promote the priority that the plan be student-centered rather than emergency-centered.**

Emergency Conditions IEP Recommendation 2

The workgroup recommends that, by requiring use of the IEP template, the California State Legislature **ensure that a summary report can be created describing how the IEP will be provided under emergency conditions**. Locally-determined IEP systems

can create this report by pulling emergency closure information from each relevant section of the IEP. A sample Emergency Conditions IEP Summary template, consisting of sections of the proposed statewide IEP template, is provided in appendix F.

10. Limitations

While the workgroup included teachers, family members, and administrators who regularly participate in IEP meetings, the workgroup recognizes that the proposed IEP template has not yet been tested by IEP teams and that additional refinement may be needed after the form has been piloted as described in this report.

11. Conclusion

While a template on its own will not likely change practices for supporting students with IEPs, the California Statewide IEP Workgroup, authorized by the Budget Act of 2020, Senate Bill 74, recommends implementation of a statewide template that clearly communicates the priorities that IEPs be strengths-based and intended to increase participation in general education and improve student outcomes.

The workgroup's recommendations are intended to increase the capacity of all IEP team members, and particularly general education teachers and parents/guardians, to meaningfully participate in development of each student's IEP and to benefit from the strategies provided in the IEP. The proposed IEP template, supported by the recommended training and resources, will leads to IEPs that continue to meet the requirements of the IDEA and California Education Code and also shift IEP teams to be more focused on student strengths and specific instructional strategies. By adopting a statewide template, California will increase transferability of IEPs for students who move

from one LEA to another and streamline not only CDE monitoring of IEPs, but also the training needed on the IEP process at many levels including in teacher preparation programs and for family support centers that support families across LEAs.

The workgroup's recommendations are intended to ensure more comprehensive descriptions of each student's strengths and needs, annual goals that are backwards mapped from long-term goals including high school graduation and post-school employment, and more comprehensive consideration of the supports and services needed in general education and other less restrictive environments to increase participation of students with IEPs.

Appendix A. Acknowledgments

We are incredibly thankful to the members of the Statewide Individualized Education Plan Workgroup who generously devoted their time and shared their rich experiences and expertise to make this work possible. The workgroup was facilitated by Sara Doutre, WestEd, and Aaron Price and Genaro Mauricio, Glen Price Group.

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Appendix B. Related Considerations for Further Examination

In the course of the workgroup's activities and discussions, a few key considerations relevant to the achievement of the workgroup's vision but beyond the scope of the workgroup's legislative charge emerged. These considerations may be of interest as the focus for future research and recommendation development efforts.

Equity in the Special Education Referral and Eligibility Determinations Processes

This workgroup was tasked with making recommendations related to the IEP development and review processes. However, there are many challenges related to services with students with IEPs that begin with the referral and eligibility determinations processes. The workgroup discussed the possibility that meeting their vision for an IEP process that leads to more inclusive practices and improved academic and functional student outcomes is dependent on ensuring equity in the special education referral and eligibility determination process. This means that students who have not received adequate instruction and support are not mislabeled as having a disability in order to receive appropriate intervention.

As one potential area of work to help address this need, the state could study and consider standardizing the processes and forms for documenting special education referrals and the eligibility evaluation process. The state could also identify and implement actions to ensure that additional culturally and linguistically appropriate resources and supports are provided to students in their existing classes prior to determining special education eligibility. This could be advanced in part through additional training for teachers in linguistically and culturally responsive instruction to

address deficit-oriented views of students from historically marginalized backgrounds and identities.

Impact of a Strengths-Based, Student-Centered Statewide IEP Template on Workload

Some workgroup members shared a concern that implementing the proposed statewide IEP template would require more time from special education teachers in particular; other workgroup members suggested that the statewide IEP template would allow for clearer and more effective IEPs that ultimately would result in a reduction in the amount of time a special education teacher needs to dedicate to each student. Given the unknown impact of the statewide IEP template on workload for special education teachers as well as other members of the IEP team, the state could study this impact and determine any necessary adjustments to workload policy and guidance on caseloads.

Appendix C. Summary of Statewide IEP Templates and Online IEP Systems, by State

State	IEP template?	Statewide IEP Template	Other Relevant Links	Template required?	Statewide Online IEP System?
Alabama	Yes	https://www.alsde.edu/sec/ses/Forms/Individualized%20Education%20Program.docx	https://www.alsde.edu/sec/ses/Pages/forms-all.aspx	Yes	No
Alaska	No	NA	NA	NA	No
Arizona	Yes	https://www.azed.gov/sites/default/files/2017/09/AZTAS%20IEP%202017%20FINAL.pdf?id=59ce6b003217e11164cae4b9	https://www.azed.gov/sites/default/files/2017/09/AZTAS%20IEP%202017%20FINAL.pdf?id=59ce6b003217e11164cae4b9	No	No
Arkansas	Yes	School Age, Secondary Transition, Early Childhood	https://dese.ade.arkansas.gov/Offices/special-education/early-childhood-special-education/special-education-forms	Yes	No
California	No	NA	NA	NA	No
Colorado	Yes	https://www.cde.state.co.us/cdesped/iep_forms	https://www.cde.state.co.us/cdesped/iep_forms	No	Yes
Connecticut	Yes	https://portal.ct.gov/SDE/Special-Education/Bureau-of-Special-Education/New-IEP	https://portal.ct.gov/-/media/SDE/Special-Education/IEP-Manual-REVISED-July-2019.pdf?la=en	Yes	Yes
Delaware	Yes	https://www.doe.k12.de.us/cms/lib/DE01922744/Centricity/Domain/78/Elementary%20IEP.pdf	https://www.doe.k12.de.us/Page/2335	Unknown	No
Florida	No	http://www.fldoe.org/core/fileparse.php/7690/urlt/0070122-qualityieps.pdf)	http://www.fldoe.org/core/fileparse.php/7690/urlt/0070122-qualityieps.pdf	No	No

State	IEP template?	Statewide IEP Template	Other Relevant Links	Template required?	Statewide Online IEP System?
Georgia	Yes	http://archives.gadoe.org/DMGetDocument.aspx/IEP_Sample_Form_revised_8-11.pdf?p=6CC6799F8C1371F627AE2CD551A09910E0B264C00DA6A0D35BFA5F5DFA41CADC&Type=D	https://www.gadoe.org/Curriculum-Instruction-and-Assessment/Special-Education-Services/Pages/Sample-Special-Education-Forms.aspx	No	Yes
Hawaii	Yes	https://ecsssonline.k12.hi.us/pages/webhelp/Stage_4_-_Develop_Plan/Individualized_Education_Program_(IEP)/About_Individualized_Education_Program_(IEP).htm	NA	Yes	Yes
Idaho	Yes	https://www.sde.idaho.gov/sped/sped-forms/	NA	No	Yes
Illinois	Yes	https://www.isbe.net/Documents/34-54-iep-forms.pdf	https://www.isbe.net/Documents/34-54-iep-forms.pdf	No	Yes
Indiana	Yes	https://www.indianaieprc.org/images/lcmats/iiep/IEPBlankForm2018-19.pdf	https://www.indianaieprc.org/images/lcmats/iiep/IEPBlankForm2018-19.pdf	No	Yes
Iowa	Yes	https://iowaideainformation.org/wp-content/uploads/Area_Education_Agency_Special_Education_Procedures_Documentation_Guide.pdf	https://drive.google.com/drive/folders/1uTn6GLdkNOt4-NmE7tTNEbfYlRhtZM0u (12 languages)	Yes	Yes
Kansas	No	https://www.ksde.org/Agency/Division-of-Learning-Services/Special-Education-and-Title-Services/Special-Education/Special-Education-Notices-Forms	NA	NA	No
Kentucky	Yes	https://education.ky.gov/districts/tech/sis/Documents/Standard-Special_Education-IEP_PSP.pdf	NA	Yes	Yes

State	IEP template?	Statewide IEP Template	Other Relevant Links	Template required?	Statewide Online IEP System?
Louisiana	Yes	https://louisianabelieves.com/docs/default-source/assessment/iep-form.pdf?sfvrsn=a0e99d1f_8	https://www.louisianabelieves.com/docs/default-source/students-with-disabilities/resources-for-educators-of-students-with-disabilities.pdf?sfvrsn=c5e89d1f_2	Yes	Yes
Maine	Yes	https://www.maine.gov/doe/sites/maine.gov.doe/files/inline-files/IEP%20-%20Effective%208-1-2020_0.docx	https://www.maine.gov/doe/learning/specialed/data	Yes	No
Maryland	Yes	http://olms.cte.jhu.edu//olms2/data/ck/sites/3915/files/IEP_Form_July_1_2020.pdf		Yes	Yes
Massachusetts	Yes	https://www.doe.mass.edu/sped/iep/forms/english/iep1-8.pdf	https://www.doe.mass.edu/sped/iep/forms/english/	Yes	No
Michigan	No	https://www.michigan.gov/mde/0,4615,7-140-6598_88186_88204---,00.html		No	No
Minnesota	No	Rubric provided of federal and state laws: https://education.mn.gov/mdeprod/idcplg?IdcService=GET_FILE&dDocName=055587&RevisionSelectionMethod=latestReleased&Rendition=primary	Include OSEP model form, nothing more	No	No
Mississippi	Yes	https://www.mdek12.org/sites/default/files/iep_fillable_form_4_13_2020.pdf		No	No
Missouri	Yes	https://dese.mo.gov/special-education/compliance/individualized-education-program-iep		Yes	No
Montana	Yes	http://opi.mt.gov/Portals/182/Page%20Files/Special%20Education/Forms/IEP%20Plan%20for%20Informational%20Pur	http://opi.mt.gov/Educators/School-Climate-Student-Wellness/Special-	Yes	Yes

State	IEP template?	Statewide IEP Template	Other Relevant Links	Template required?	Statewide Online IEP System?
		poses%20Only.pdf?ver=2021-02-12-110755-087	Education/Special-Education-Forms-Guides		
Nebraska	Yes	https://www.education.ne.gov/wp-content/uploads/2017/07/iep-form.pdf	https://www.education.ne.gov/wp-content/uploads/2017/07/iep-form.pdf	No	No
Nevada	Yes	https://doe.nv.gov/uploadedFiles/nde.doe.nv.gov/content/Inclusive_Education/IDEA_Forms_and_Docs/IEPForm(1).pdf	NA	Yes	No
New Hampshire	Yes	https://nextsteps-nh.org/wp-content/uploads/IEP-Blank-from-NHSEIS-4-11-16.pdf	https://nextsteps-nh.org/wp-content/uploads/IEP-Blank-from-NHSEIS-4-11-16.pdf	Yes	Yes
New Jersey	Yes	https://www.nj.gov/education/specialed/form/	NA	No	No
New Mexico	Yes	Preschool/Elementary School IEP: https://webnew.ped.state.nm.us/wp-content/uploads/2019/08/PreSchool-Elementary-School-Individualized-Education-Program-IEP-Revised-August-2019.docx Secondary School IEP: https://webnew.ped.state.nm.us/wp-content/uploads/2019/08/Secondary-Indiviualized-Education-Program-IEP-Revised-August-2019.docx	https://webnew.ped.state.nm.us/bureaus/special-education/forms/	No	No
New York	Yes	http://www.p12.nysed.gov/specialed/formsnotices/IEP/IEPform.doc	http://www.p12.nysed.gov/specialed/formsnotices/IEP/home.html	Yes	No
North Carolina	Yes	https://ec.ncpublicschools.gov/policies/forms/state-forms-directions/english-directions/directions-iep.pdf	NA	Yes	Yes

State	IEP template?	Statewide IEP Template	Other Relevant Links	Template required?	Statewide Online IEP System?
North Dakota	Yes	https://www.nd.gov/dpi/education-programs/special-education	NA	Yes	Yes
Ohio	Yes	http://education.ohio.gov/getattachment/Topics/Special-Education/Federal-and-State-Requirements/Ohio-Required-and-Optional-Forms-Updated/iep-pr-07-form-static.pdf.aspx?lang=en-US	http://education.ohio.gov/getattachment/Topics/Special-Education/Federal-and-State-Requirements/Ohio-Required-and-Optional-Forms-Updated/IEP-PR-07-form9-27-18.pdf.aspx?lang=en-US	Yes	No
Oklahoma	Yes	https://sde.ok.gov/sites/ok.gov.sde/files/Form%207%20IEP%20(web).pdf	https://sde.ok.gov/sites/ok.gov.sde/files/Form%207%20IEP%20(web).pdf	Yes	Yes
Oregon	Yes	https://www.oregon.gov/ode/students-and-family/SpecialEducation/publications/Oregon%20Standard%20IEP/orstandardiep.docx	https://www.oregon.gov/ode/students-and-family/SpecialEducation/publications/Pages/Oregon-Standard-IEP.aspx	Yes	No
Pennsylvania	Yes	https://www.pattan.net/getattachment/Forms/Individualized-Education-Plan-IEP/Individualized-Education-Plan-IEP/IEP-Feb-1-2020.docx?lang=en-US&ext=.docx	https://www.pattan.net/Forms/Individualized-Education-Plan-IEP	No	No
Rhode Island	Yes	For Ages 3-13: https://www.ride.ri.gov/Portals/0/Uploads/Documents/OSCAS/RI-Age-3-thru-13-IEP-form_2.pdf Secondary: https://www.ride.ri.gov/Portals/0/Uploads/Documents/OSCAS/RI-Secondary-IEP-form_4.pdf	https://www.ride.ri.gov/StudentsFamilies/SpecialEducation/IEP%E2%80%93IndividualEducationProgram.aspx#43711923-iep-forms	Yes	No
South Carolina	Yes	Not available online.	https://ed.sc.gov/districts-schools/special-education-	Yes	Yes

State	IEP template?	Statewide IEP Template	Other Relevant Links	Template required?	Statewide Online IEP System?
			services/oversight-and-assistance-o-a/south-carolina-enrich-iep-system/		
South Dakota	Yes	https://doe.sd.gov/sped/documents/IEP-pln14.docx	https://doe.sd.gov/sped/IEP.aspx	No	Yes
Tennessee	Yes	https://www.tn.gov/content/dam/tn/education/forms/ed2998_iep_sample.pdf	https://www.tn.gov/content/dam/tn/education/forms/ed2998_iep_sample.pdf	Yes	Yes
Texas	Yes	https://tea.texas.gov/sites/default/files/IEP%20MODEL%20FORM%20REVISED%20Summer%202020%20English%20Version.pdf	https://tea.texas.gov/academics/special-student-populations/special-education/programs-and-services/iep-model-form	No	No
Utah	Yes	https://www.google.com/url?client=internal-element-cse&cx=004767599214043181413:fbhnnu9j_la&q=https://www.schools.utah.gov/file/b0884b49-44af-4a51-873f-706431e24d9d&sa=U&ved=2ahUKEwjEpfOl1ZLwAhUPIqwKHcDPCG0QFjAHegQIAxAB&usg=AOvVaw3nNewyD64JAZLuGxF4OBm4	https://schools.utah.gov/specialeducation/resources/lawsrulesregulations?mid=942&tid=2	No	No
Vermont	Yes	https://education.vermont.gov/sites/aoe/files/documents/edu-form-5-individualized-education-program-iep.pdf	https://education.vermont.gov/student-support/vermont-special-education/special-education-forms	No	No
Virginia	Yes	https://www.doe.virginia.gov/special_ed/iep_instruct_svcs/iep/forms/sample_iep_form.doc	https://www.doe.virginia.gov/special_ed/iep_instruct_svcs/iep/	No	Yes

State	IEP template?	Statewide IEP Template	Other Relevant Links	Template required?	Statewide Online IEP System?
Washington	Yes	https://www.k12.wa.us/sites/default/files/public/specialed/data/stateforms/6c-iep-form-no-transition.docx	https://www.k12.wa.us/student-success/special-education/program-improvement/model-forms-services-students-special-education	No	No
West Virginia	Yes	https://wvde.state.wv.us/osp/compliance/pdf-fillable/IEP_PART_I_STUDENT_INFORMATION_and_PART_II_DOCUMENTATION_OF_ATTENDANCE.pdf	https://wvde.us/special-education/individualized-education-program/idea-forms/	Unclear	Yes
Wisconsin	Yes	https://dpi.wi.gov/sped/laws-procedures-bulletins/procedures/sample/forms	NA	No	No
Wyoming	Yes	https://edu.wyoming.gov/downloads/special-ed/speced_forms_i-4_individualized_education_program_iep_july2013B15BBDE2F6B2.pdf	https://edu.wyoming.gov/for-district-leadership/special-programs/special-programs-forms/	No	No

Appendix D. Survey Questions Used to Elicit Stakeholder Input

The California IEP Workgroup conducted four surveys to inform development of its recommendations:

1. Survey of State Special Education Directors

2. Survey of LEA and SELPA administrators

3. Survey of family members of students with IEPs

4. Survey of teachers, school administrators, and special education service providers

The survey questions for each of these surveys are included in the corresponding subsections below. The results from these surveys, summarized in section 8 of this report, were shared with the workgroup members and used to inform the development of the workgroup's recommendations and the statewide IEP template.

IEP Workgroup Survey of State Special Education Directors – February 2021

1. State (dropdown)

2. Please provide your contact information (name and email fields)

3. Does your state have a statewide IEP template? (yes or no)

   If yes:

   a. Please share a copy of your template (document upload)

   b. Please share a link to your template (open-ended)

   c. Are LEAs required to use the IEP template? (yes or no)

      If yes:

      i.   Are LEAs allowed to make revisions to the IEP template? (yes or no)

      ii.   Is your IEP template translated into multiple languages? (yes or no)

          1. If yes, which languages? (open-ended)

      iii.   What influenced LEA adoption of the statewide template? Did you incentivize adoption? Were there any unanticipated barriers to adoption? (open-ended)

d. What percentage of LEAs have adopted the statewide template? (open-ended)

e. What do you think has influenced LEAs most to adopt or not adopt the statewide template? (open-ended)

4. Does your state provide a statewide online IEP system for LEAs? (yes or no)

If yes:

a. Are LEAs required to use the online IEP system? (yes or no)

If yes:

      i.   Are LEAs allowed to add items or pages to the IEP system? (yes or no)

      ii.   Who is the vendor for your current system (or is it run fully by the state)? (open-ended)

      iii.   How satisfied are you with your current vendor? (5-point scale of agreement from very dissatisfied to very satisfied)

iv. What accessibility features are available in your current system (i.e., text to speech, speech to text, background color options, electronic glossary, etc.)? (open-ended)

v. What is one thing about your current online IEP system you would recommend another state adopt? (open-ended)

vi. What influenced LEA adoption of the statewide system (incentives, challenges)? (open-ended)

vii. What lessons learned would you recommend another state consider when evaluating the feasibility of a statewide online system? (open-ended)

viii. Please share a link to the online IEP system and any further information, guidance, and related tools (open-ended)

b. What percentage of LEAs use the statewide system? (open-ended)

c. What do you think has influenced LEAs most to adopt or not adopt the statewide system? (open-ended)

5. Does your state have a template for distance learning plans as part of or as a supplement to the IEP? (yes or no).

If yes:

a. Please share a copy of your template (if available)(document upload)

b. Please share a link to your template (if available)(open-ended)

c. Are LEAs required to use the template? (yes or no)

If yes:

i. Are LEAs allowed to make revisions to the template? (yes or no)

6. What are your most important lessons learned from considering, creating, or implementing a statewide IEP template or system? (open-ended)

7. If you could change two things about your current IEP template, system, or the processes surrounding their use, what would they be? (open-ended)

8. Does your state have alternate pathways for students with disabilities to earn regular high school diplomas? (open-ended)

9. Does your state have a state defined alternate diploma for students with significant cognitive disabilities as defined by ESSA? If yes, please describe (open-ended)

10. Please share the best link(s) to learn more about your graduation pathways for students with disabilities (open-ended)

IEP Workgroup Survey for LEAs & SELPAs - March 2021

1. Does your LEA or SELPA currently use: (single answer, options below)

    a. SELPA forms committee IEP template, without modifications

    b. SELPA forms committee IEP template, with modifications

    c. IEP template provided by our online IEP provider

    d. IEP template created by the LEA

    e. Other (please specify)

2. What modifications have you made to the template? (open-ended)

3. How satisfied are you with your current IEP template? (5 point spectrum of agreement from very dissatisfied to very satisfied)

4. What is one thing about your current IEP template you would recommend be adopted for a statewide template? (open-ended)

5. Are there any parts of your current IEP template that you believe are barriers to meaningful participation by all IEP team members including parents and general education teachers? (open-ended)

6. How likely would you be to adopt an optional statewide IEP template? (5 point scale of agreement from very unlikely to very likely)

7. What would be the most important considerations for you in making this decision? (open-ended)

8. What do you believe are the greatest potential benefits of a statewide IEP template? (open-ended)

9. What do you believe are the greatest potential challenges of a statewide IEP template? (open-ended)

10. Do you currently use an online IEP system? (yes or no)

   If yes:

   a. Who is your current vendor? (open-ended)

   b. How satisfied are you with your current vendor? (5 point spectrum of agreement from very dissatisfied to very satisfied)

   c. What is one thing about your current online IEP system you would recommend be adopted in a statewide system? (open-ended)

   d. Are there any lessons learned you would want the state to consider when evaluating the feasibility of a statewide online system? (open-ended)

11. If the state offered an optional online IEP system, funded by the state, how likely would you be to adopt that online IEP system? (5 point scale from very unlikely to very likely)

12. What would be the most important considerations for you in making this decision? (open-ended)

13. What do you believe are the greatest potential benefits of a statewide online IEP system? (open-ended)

14. What do you believe are the greatest potential challenges of a statewide online IEP system? (open-ended)

15. Please select the description that best describes your role: (single answer, options below)

    a. LEA Special Education Director

    b. LEA Special Education Staff

    c. SELPA Director

    d. SELPA Staff

    e. Teacher or Direct Service Provider

    f. Other (please specify)

IEP Workgroup Survey for Family Members of Students with IEPs - May 2021

1. How old is your child? (open-ended)

2. Demographic information:

    a. What is your family's primary spoken language? (open-ended)

    b. What is your family's ZIP code? (open-ended)

3. What is your child's primary disability category? (single answer, options below)

    a. Autism

    b. Deaf-blindness

    c. Deafness

      d. Emotional disturbance

      e. Hard of hearing

      f. Intellectual disabilities

      g. Medical disability

      h. Multiple disabilities

      i. Orthopedic impairment

      j. Other health impairment

      k. Specific learning disability

      l. Speech or language impairment

      m. Traumatic brain injury

      n. Visual impairment

      o. I don't know

4. How many IEP meetings have you attended for your child? (single answer, options below)

      a. None

      b. 1-3

      c. 4-10

      d. 11-20

      e. 21 or more

5. Please rate your agreement with the following statements: (5 point spectrum of agreement from strongly disagree to strongly agree)

      a. I feel welcomed and included at my child's IEP meetings

b. My child's special education case manager (speech, resources or SDC teachers) helps me prepare to be an active participant at IEP meetings

c. I understand my role during the IEP meeting

d. The members of my child's IEP team fully understand my child's needs

e. I know who my child's general education teacher is or who it would be if they were included in the general education classroom

f. A general education teacher attends and participates in my child's IEP meetings

g. I have a copy of my child's current IEP

h. My child's IEP accurately describes their strengths

i. My child's IEP is focused on their weaknesses or deficits

j. I know my child's IEP goals

k. I understand how my child's IEP goals are connected to the CA Common Core general education standards

l. I know what the long-term academic goals are for my child

m. My IEP team has discussed long-term goals for my child that are not only academic

n. My child's IEP is helping them meet their long term goals

o. I find the IEP to be a useful document

p. My child's teachers use their IEP to make sure my child receives services and learns like other students in school

q. I feel safe and heard sharing my opinion about the content of the IEP

r. I am comfortable asking clarifying questions during IEP meetings

    s.   I am comfortable waiting to sign the IEP after the IEP meeting if I don't

       understand something or want to think about it before signing

    t.   I am provided with an interpreter at my IEP meetings

6. Who leads your child's IEP meetings? (open-ended)

7. Which part(s) of the IEP process and document do you find most useful and clear? (open-ended)

8. Which part(s) of the IEP process and document do you find least useful or most confusing? How would you improve that? (open-ended)

9. Please describe your most positive IEP meeting experience and what made it most beneficial (open-ended)

10. Do you have any other input on the IEP process or on a future template for IEP forms? (open-ended)

11. If you could change one thing about the IEP form, what would you change? (open-ended)

12. If you could change one thing about your IEP meetings and the IEP process, what would you change? (open-ended)

IEP Workgroup Survey for Teachers, Administrators, and Services Providers - April 2021

1. Which of the following best describes your current position? (single answer, options below). If participants select b, c, or d then show question 4.

    a.   School Administrator

    b.   Special Education Teacher

    c.   General Education Teacher

d. Related Services Provider

e. General/Special Education Teacher

f. Other (please specify)

2. Which positions have you previously worked in? (multiple answers, options below)

a. Special Education Teacher

b. General Education Teacher

c. Related Service Provider

d. Pupil Personnel Services (Counselor or School Psychologist)

e. Other (please specify)

3. Which grade levels do you generally work with? (multiple answers, options below)

a. Preschool

b. Elementary

c. Middle

d. High

e. Adult/post-high transitions

4. How long have you been teaching? (single answer, options below). Only shown if participants responded b, c, or d to question 1.

a. This is my first year

b. 2 - 5 years

c. 6 - 10 year

d. 11+ years

5. How many IEP meetings did you lead or attend in the 2019-2020 school year? (single answer, options below)

   a. None

   b. 1 - 3 meetings

   c. 4 - 10 meetings

   d. 11 - 20 meetings

   e. 21 or more meetings

6. Please rate your agreement with the following statements: (5 point scale from strongly disagree to strongly agree)

   a. I know how to prepare to be an active participant in IEP meetings

   b. I understand my role during the IEP meeting

   c. I know how to actively engage parents in IEP meetings

   d. I can easily access the IEP (whether hardcopy or electronic copy) for the students with disabilities I serve

   e. I regularly refer to the IEP to know what my students' goals are

   f. I know which classroom accommodations are on my students' IEPs

   g. I find the IEP to be a useful document

   h. Parents find the IEP to be a useful tool

   i. I meet with parents prior to the IEP meeting to go over what will be discussed during the meeting

   j. I attend at least one professional development session addressing the IEP Process each school year

   k. I feel safe sharing my opinion about the content of the IEP

l.   I am comfortable asking clarifying questions during IEP meetings

m. I feel pressure at IEP meetings because of the potential for legal disputes

7. What types of training and professional development have you participated in to assist you with IEP development? (open-ended)

8. What types of training, if any, have you participated in related to how to facilitate or participate in IEP meetings? (open-ended)

9. Which part(s) of the IEP document do you find most useful and clear? (open-ended)

10. Which part(s) of the IEP document do you find least useful or most confusing? (open-ended)

11. Please describe the best IEP meeting you've attended and what happened that worked well. (open-ended)

12. If you could change one thing about the IEP form, what is the one thing you would add? (open-ended)

13. If you could change one thing about your IEP meetings, what would you change? (open-ended)

14. Do you have any other input on the IEP process or on a future template for IEPs? (open-ended)

15. Which school district or charter school do you work for (optional)? (open-ended)

16. If you are willing to provide additional information or participate in an interview about your experience, please provide your name and contact information (optional)(open-ended)

Appendix E. Timeline for Implementation of the Workgroup's Recommendations

Key action steps to implement the workgroup's recommendations in each fiscal year between 2022-23 and 2027-2028 are described below. At the end of each action step, relevant recommendations are referenced in parentheses.

Beginning Fall 2022 and Ongoing Thereafter

- **Statewide IEP Advisory Board:**
    - **Fall 2022:** CDE establishes a statewide IEP Advisory Board (IEP Template Recommendation 3)
    - **Ongoing:** CDE continues to staff and support regular meetings of the IEP Advisory Board (IEP Template Recommendation 3)
- **Guidance and Curated Resources:**
    - **Fall 2022:** CDE establishes an online location for posting current guidance and a curated set of case studies, resources, tools, and other examples of best practices (IEP Process Recommendations 1b, 1c, 2c)
    - **Ongoing:** CDE gathers and curates case studies, resources, tools, and other examples of best practices, including those related to increasing the active participation of general education teachers. Following the establishment of the Statewide IEP Advisory Board (see above), CDE works with the Statewide IEP Advisory Board to institute a process whereby LEAs can submit resources to the Advisory Board for consideration and the Advisory Board determines whether submitted

resources should be included on the curated list (IEP Process Recommendations 1c, 2c)

- ○ **Ongoing:** CDE regularly updates posted guidance related to the IEP template and process (IEP Process Recommendation 1b)

2022–23

- **Communication:** CDE communicates why and how the state is prioritizing changes to the IEP process (IEP Process Recommendation 1a)

- **Monitoring & TA:** CDE reviews monitoring and TA materials and activities (IEP Process Recommendation 1d) and ensures that formal guidance and monitoring procedures communicate that the active participation of the student's general education teacher is required (IEP Process Recommendations 2a, 2b)

- **IEP Pre-Meeting Input:** CA Legislature defines pre-meeting input (IEP Process Recommendation 3a) and requires associated monitoring by CDE (IEP Process Recommendation 3b)

- **IEP Pre-Meeting Input**: CA Legislature revises California Education Code Section 56341.5 to require LEAs to solicit pre-meeting input from students, families/guardians, teachers, providers, and case managers, and allocates funds for training LEAs to elicit input (IEP Process Recommendation 3)

- **Resources & Training**: CDE, informed by the Statewide IEP Advisory Board, develops and/or contracts for the development of resources and training related to the IEP process and template (IEP Process Recommendation 4, IEP Template Recommendation 2)

- **Statewide IEP Template:** CA Legislature requires use of the statewide IEP template by 2027-2028 school year (IEP Template Recommendations 1, 2)

- **Required IEP Participants for Preschool Transition:** CA Legislature revises California Education Code Sections 56341(i) and 56341.5 to require participation of the child's Part C service coordinator or Part C service provider in the first IEP meeting for a three-year-old child transitioning to preschool (IEP Transitions Recommendation 4)

- **Required Age for Postsecondary Planning:** CA Legislature revises the California Education Code Sections 56043(g), 56345(a)(8), 56043(e), and 56341.5(e) to adjust the required age for postsecondary transition planning from 16 to 14 (IEP Transitions Recommendation 3)

Fall 2023 Through Spring 2030

- **Local IEP System Modification:** CA Legislature provides one-time funds to LEAs implementing the statewide IEP template for necessary modification of locally operated online IEP systems to accommodate implementation of the Statewide IEP Template (IEP Template Recommendation 1b) and to implement specific IEP system functions including a parent portal, general education teacher portal, and summary report of the means by which the IEP will be provided under emergency conditions (Online IEP System Recommendation 3)

- **Credential Requirements Review:** CA Legislature directs the CTC to review and revise as needed credential requirements to include training on the statewide IEP template and student-centered, strengths driven IEP processes (IEP Template Recommendation 4)

- **IEP Template Training**: CDE begins statewide training on the proposed IEP process and template (IEP Process Recommendation 4, IEP Template Recommendation 2b)

- **IEP Template Pilots**: CDE, in collaboration with the Statewide IEP Advisory Board, recruits 10 pilot LEAs to begin using the new IEP template in the 2023-2024 school year (IEP Template Recommendation 2b)

- **IEP Template Translation**: CDE makes the proposed IEP template available in the top five languages spoken by California families/guardians (IEP Template Recommendation 2b)

2024–25

- **IEP Template Pilots:** CDE, in collaboration with the Statewide IEP Advisory Board, coordinates the piloting of the new IEP template in 10 LEAs, provides ongoing training and technical assistance to pilot LEAs, and collects feedback from pilot LEAs to inform potential changes to the IEP template, resources, and training content (IEP Template Recommendation 2c)

2025–26

- **State Data Collection:** CDE revises CALPADs to collect additional data from each student's IEP (Online IEP System Recommendation 2)

- **IEP Template:** CDE, in collaboration with the Statewide IEP Advisory Board, publishes the final Statewide IEP Template and establishes a plan for providing

IEP process and template training and supports to all LEAs in the state (IEP

Template Recommendation 2d)

2026-27 and 2027–28

IEP Template Full Implementation: CDE, in collaboration with the Statewide IEP

Advisory Board, implements the plan to provide IEP process and template training and

supports to all LEAs in the state to achieve full implementation of the Statewide IEP

Template by the 2027-2028 school year (IEP Template Recommendation 2)

Appendix F. Statewide IEP Template

This appendix includes multiple versions of the recommended statewide IEP template:

1) Recommended IEP Template. This template includes all required IEP content for all students with IEPs as well as items that will only be included for specific populations of students including multilingual students and student participating in alternate assessments. The workgroup estimated the IEP template for most students with an IEP to be approximately 10 pages. This template also includes the IDEA regulatory and California Education Code requirements that justify and are met by each section of the template.

2) IEP Summaries. In order to make the IEP as useful a tool as possible beyond the IEP meeting, the workgroup recommends the development of summaries of the most relevant information from the IEP that can be individualized based on the needs of the student (see Online IEP System Recommendation 3). Three sample summaries are included:

   a. IEP Summary for General Education Teachers

   b. IEP Summary for Parents/Guardians

   c. IEP Summary Describing how the IEP will be Implemented Under Emergency Conditions.

Please note that the statewide IEP template captures the recommendations of the workgroup. However, final implementation and adaptation will be completed by the California Department of Education (CDE). The workgroup provided the CDE with an additional annotated template including notes about implementation.

Annual Individualized Education Program (IEP)   **IEP Dates: _____ to _____**

Student name and pronouns: _____   School district: _____ Student ID number: _____ Grade: _____   School of residence or choice: _____ Student birthdate and age: _____   School the student attends (if different): ____ Primary language of the student: _____   IEP type (circle one): Primary language(s) of the family/guardian: _____   Initial   Annual   Amendment

1. Student Strengths, Interests, Preferences, and Learning Needs
[34 CFR §§300.324(a)(1), (b)(3); EC sections 56341(b)(2), 56341.1(a), (f)]

1a. Strengths

(Student) I am particularly good at: (Family/Guardian) Our child/young adult's strengths are: (Teachers and Service Providers) The student's strengths at school and with their peers are:

1b. Interests

(Student) I am interested in and like to: (Other Team Members) The student also has expressed interests in and preferences for:

1c. Learning and Communication Preferences

(Student) I learn and experience school best in these ways and with these supports: (Student) I communicate in these ways:

1d. Learning Needs

(Family/Guardian) Our concerns and priorities for our child/young adult's education this year are:

(Teachers and Service Providers) Our priorities for the student's learning and making progress in the general education curriculum this year are:

(IEP Team) This information from formal and informal evaluations, including progress toward previous goals, is most important to consider in developing this IEP and informing instructional strategies:

2. Vision for the Future and Pathway to a High School Diploma

[34 CFR §§300.124, 320(b), 321(f); EC sections 56341(i), 56345(a)(8), (b)(1), (b)(4)]

2a. High School Graduation Date – Projected date of graduation with a high school diploma: _____

2b. Student Vision for the Future

Next week I want to / I want my child or young adult to:

In **one year**, I want to / I want my child or young adult to:

In **three years**, I want to / I want my child or young adult to:

In **five to ten years**, I want to / I want my child or young adult to:

After I leave high school, I want to / I want my child or young adult to: (required for students age 14 and older)

2c. Course of Study (required for students who will participate in 8th grade or higher during this IEP)

Course of study that will lead to a high school diploma.

Is this an alternate route to a high school diploma?　　　　　　　　　　○ Yes　　　　○ No

If yes, justification for the use of an alternate route to a high school diploma including why the student could not meet the high school diploma requirements with appropriate accommodations and modifications.

Total credits required for graduation	Credits earned already	Remaining credits needed for graduation

2d. Important Transitions on the Pathway to a High School Diploma

☐ None	☐ Transitioning from a nonpublic placement
☐ Entering preschool from early intervention	☐ Transitioning to more or less time in general education
☐ Entering elementary school (Kindergarten)	
☐ Entering middle school	☐ Transitioning between available methods to participate in school (e.g., independent study, distance, hybrid, in-person learning
☐ Entering high school	
☐ Leaving high school	
☐ Transitioning to a new school	☐ Other (specify): _____

How the student has been or will be prepared for any upcoming transitions and any supports needed to ensure a smooth transition.

3. Special Factors

[34 CFR §300.324(a)(2); EC sections 56341.1(b), (c), 56345(a)(9), (b)(2), (b)(5)]

3a. Behavior

i. Are there behavioral interventions, supports, or other strategies, in addition to any schoolwide or typical classroom supports, needed to address behavior that impedes the student's learning or the learning of others?　　　　　　　　○ Yes　　　　○ No
If yes, the student's behavior needs must be further addressed in section 4 of this IEP.

ii. Does the student have or need a Behavioral Intervention Plan (BIP)?　　○ Yes　　○ No
If yes, the BIP must be attached to this IEP.

3b. Blindness and Visual Impairments

i. Is the student blind or visually impaired?　　　　　　　　　　　　○ Yes　　○ No

ii. Does the IEP include instruction in Braille or the use of Braille?　　○ Yes　　○ No

Justification if no.

3c. Communication Needs and Deaf or Hard of Hearing

i. Does the student have communication needs?　　　　　　　　　　○ Yes　　○ No

ii. Is the student deaf or hard of hearing?　　　　　　　　　　　　　○ Yes　　○ No

If yes to either, communication needs must be addressed in this IEP.

3d. Assistive Technology Devices and Services

i. Does the student need assistive technology devices and services?　○ Yes　　○ No

3e. Individualized Health Plan

i. Does the student have medical conditions that require an Individualized Health Plan (IHP)?　　　　　　　　　　　　　　　　　　　　　　　　○ Yes　　○ No

If yes, the IHP must be attached to this IEP.

3f. Multilingual Learner

i. Is the student an emerging multilingual learner?　　　　　　　○ Yes　　　○ No
If yes, complete the remainder of this section.

ii. What is the student's primary language? _____

iii. Does the student need primary language supports during integrated ELD (across content
areas)?　　　　　　　　　　　　　　　　　　　　　　　○ Yes　　　○ No

> Description of needed supports.

iv. Where will the student receive Designated ELD?
☐ General Education Classroom　　　☐ Special Education Classroom　　　☐ Other

> If special education classroom or other are selected, **justification and description of the
> supports and services** that would be needed to provide designated ELD in the general
> education classroom.

v. Is the multilingual learner currently participating in:
☐ Structured English Immersion Program (SEI)
☐ Other, parent/guardian selected multilingual/ language acquisition program
☐ None

3g. Emergency Conditions

> Considerations for how the student will receive any needed accommodations or services due
> to special factors including ELD services under emergency conditions in which instruction or
> services, or both, cannot be provided to the student either at the school or in person for more
> than 10 school days during the board-approved instructional academic year.

4. Plan for Achieving Academic, Functional, and Post-School Outcomes

[34 CFR §§300.320(a), (b), 324(a); EC sections 56341.1(a), (f), 56345(a)(1), (a)(2), (a)(3), (a)(8), (b)(2)]

4a. Present Levels of Performance

Present levels of performance as determined using multiple measures across learning modalities and settings. Includes how the student's disability affects their participation and progress in the general education curriculum (i.e., the same curriculum as for nondisabled children) and for preschool children, as appropriate, how the disability affects the child's participation in appropriate activities.

Academic performance	Communication, social-emotional, functional, behavior, and other performance	(required for students age 14 or older) **Results of transition assessment(s) related to** training or education, competitive integrated employment, and independent and/or supported living (as appropriate)

To inform standards-based goals, the **student's status related to the grade-level content standards in the student's current grade and in the highest grade the student will participate in during the period of this IEP**, including standards met, with and without accommodations, and standards the student needs support to meet.

How the disability affects the child or student's participation in routines and activities including those related to academic learning including pre-literacy and pre-numeracy, inside and outside the classroom. (required for preschool children, optional for other students)

Routine or Activity	Impact of Disability (positive or negative)

4b. Annual, Measurable IEP Goal(s)

Short-term objectives to meet each goal are required for students who take alternate assessments aligned to alternate academic standards and optional for others.

Standards-based academic goal(s)	Communication, social-emotional, functional, behavior, and other goal(s)	(required for students age 14 or older) **Post-school goal(s)** for training or education, competitive integrated employment, and independent and/or supported living (as appropriate)

Confirm that each goal:
- ☐ Is grounded in the student's strengths, priorities, and vision
- ☐ Maintains or increases the rate of progress based on past goals and progress
- ☐ Is connected to one or more grade-level standards, course requirements or developmental standards
- ☐ Is linguistically appropriate

Progress toward each goal. How and how frequently will the student's progress toward each goal be measured and reported?

Goal #	Mechanism	Frequency

4c. Instructional Strategies to Meet Annual Goals

Strategies (e.g., embedded systematic instruction, peer supports, use of graphic organizers) to be used in the general education setting to support the student to make progress toward their academic goals.

Academic strategies	Communication, social-emotional, functional, behavior, and other strategies	(required for students age 14 or older) Strategies related to secondary transition

4d. Family Engagement and Partnership

How the IEP team will support the family, including strategies to help the family support the student.

Academic supports	Communication, social-emotional, functional, behavior, and other supports	(required for students age 14 or older) Supports related to secondary transition

4e. Emergency Conditions

Considerations for how the student's goals can be met under emergency conditions in which instruction or services, or both, cannot be provided to the student either at the school or in person for more than 10 school days during the board-approved instructional academic year.

Academic considerations	Communication, social-emotional, functional, behavior, and other considerations	(required for students age 14 or older) Considerations related to secondary transition

5. Nonacademic, Extracurricular, and Social Activities
[34 CFR §§300.117, 320(a)(4)(ii); EC sections 56345(a)(4), (c)]

How the student will participate in nonacademic, extracurricular, and social activities with their nondisabled peers, including any activities and community experiences to support post-school goals.

If the child will not participate, justification that includes the types of supports that would make participation possible and why they are not feasible at the current time.

Plan for maximizing participation and what resources will be provided.

5a. Emergency Conditions

Considerations for how the student will have access to nonacademic, extracurricular, and social activities under emergency conditions in which instruction or services, or both, cannot be provided to the student either at the school or in person for more than 10 school days during the board-approved instructional academic year.

6. Accommodations, Special Education and Related Services, and Program Modifications
[34 CFR §§300.320(a)(4), (a)(7), (b), 324(b)(3); EC sections 56341(b)(2), 56345(a)(4), (7), (8)]

6a. Accommodations

Accommodation	Title(s) of Professional Staff Responsible	Needed for Assessments (Y/N)	Related Goal(s) and Areas of Need Addressed

6b. Program Modifications

Program Modification	Title(s) of Professional Staff Responsible	Related Goal(s) and Areas of Need Addressed

6c. Special Education and Related Services

Special Education or Related Service	Title of Professional Staff Responsible	Frequency and Duration Use only one column for each service, document by minutes.			Location	Dates of Service		Related Goal(s) and Areas of Need Addressed
		Per Day	Per Week	Per Month		Start	End	
i. Consultation (Indirect Services to School Personnel and Parents/Guardians)								
Total Minutes (Indirect Services)								
ii. Special Education and Related Services in the General Education Classroom (Direct Services)								
Total Minutes								
iii. Special Education and Related Services in Other Settings (Direct Services)								
Total Minutes								

Total minutes of services provided in general education (a)	
Total minutes of services provided outside general education (b)	
Total minutes of school (c)	
Percentage of special education and related services in general education (a) / (c)	

For each service provided outside of the general education classroom:

> Justification.

> Supports that would need to be in place to enable the service to be provided in the general education classroom.

6d. Other Services and Agencies (required for students age 14 or older)

Services outside of special education the student is receiving **at school** that should be considered as part of the student's educational plan (e.g., supplemental tutoring, enrichment courses, counseling)

Services outside of school (private or public) the student is currently receiving or needs to receive.

Agency or Provider Name	Service(s) Currently Receiving or Needed (if needed, how the service will be accessed, or a referral provided)

6e. Emergency Conditions

Considerations for how the student will receive the accommodations, modifications, and special education and related services in this IEP under emergency conditions in which instruction or services, or both, cannot be provided to the student either at the school or in person for more than 10 school days during the board-approved instructional academic year.

7. Least Restrictive Environment

[34 CFR §§300.114, 116, 320(a)(5); EC sections 56040(b), 56040.1, 56342(b), 56342.1, 56345(a)(4)-(5)]

7a. For Students in Elementary, Middle, or High School:

i. Will the student attend the school that is as close to their home as possible?   ◯ Yes   ◯ No

> If no, justification including student/family/guardian choice.

ii. Will the student receive all special education services with nondisabled peers? ◯ Yes   ◯ No

> If no, justification including a description of all options explored during the annual IEP process, including provision of all special education services in the general education classroom, or otherwise with nondisabled peers.

<table>
<tr><td>

If no, description of the additional supports or accommodations that would need to be in place in the general education classroom for the student to receive all or more special education and/or related services in the general education classroom.

</td></tr>
</table>

7b. For Preschool Students:

i. Will the student attend a general education preschool or other regular early childhood program?

                ◯ Yes   ◯ No

If yes, how many minutes does the student attend each week? _____

<table>
<tr><td>

If no, justification for why the student is not attending this type of program.

</td></tr>
</table>

ii. Will the student receive all their special education and related services embedded within regular classroom routines and activities?   ◯ Yes   ◯ No

<table>
<tr><td>

If no, description of all options explored for providing all special education services in a regular early childhood setting.

</td></tr>
<tr><td>

If no, description of the additional supports or accommodations that would need to be in place in the regular early childhood setting for the student to receive special education and/or related services.

</td></tr>
</table>

7c. For all Students

i. Is the placement based on the student's educational needs documented in this IEP?

                ◯ Yes   ◯ No

ii. Is the provision of services outside of general education necessary based on the nature and severity of the student's disability and not on the need for modifications in the general curriculum?   ◯ Yes   ◯ No

7d. Emergency Conditions

<table>
<tr><td>

Considerations for how the student will have access to general education instruction and general education peers under emergency conditions in which instruction or services, or both, cannot be provided to the student either at the school or in person for more than 10 school days during the board-approved instructional academic year.

</td></tr>
</table>

8. Transportation as a Related Service

[34 CFR §300.34; EC Section 56342(a)]

Does the student need transportation to access and benefit from special education and related services? ○ Yes ○ No

If Yes, transportation will be provided:

○ On a regular transportation vehicle with the following modifications and/or specialized equipment and precautions:

○ On a special transportation vehicle with the following modifications and/or specialized equipment and precautions:

Any accommodations or services needed during transportation including behavior supports must be documented in Section 6.

9. Extended School Year

[34 CFR §300.106; EC Section 56345(b)(3); CCR Section 3043]

9a. Eligibility

Is the student eligible for extended school year?

○ Yes, based on the following information or data reviewed by the IEP team:

○ No, based on the following information or data reviewed by the IEP team:

○ The team will need to collect further data and reconvene to make a decision. Date by which the IEP team will reconvene and data to review:

9b. Extended School Year Goals and Services (for eligible students)

IEP goals and, when appropriate, short-term objectives from this IEP that will be addressed during extended school year:

Extended School Year Special Education and Related Services	Title of Professional Staff Responsible	Frequency and Duration Use only one column for each service, document by minutes.			Location*	Dates of Service	
		Per Day	Per Week	Per Month		Start	End

9c. Emergency Conditions

Considerations for how the student will have access to extended school year services under emergency conditions in which instruction or services, or both, cannot be provided to the student either at the school or in person for more than 10 school days during the board-approved instructional academic year.

10. Participation in Local (e.g., Districtwide) and Statewide Assessments

[34 CFR §300.320(a)(6)(i); EC Section 56345(a)(6)]

Only accommodations listed in Section 6 of this IEP and used by the student for classroom instruction and classroom testing may be used during statewide or districtwide assessments.

10a. Local Assessments

◯ Local assessments are not administered at this student's grade level.

◯ Student will participate in local assessments without accommodations.

◯ Student will participate in local assessments with the following accommodations or modifications:

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

10b. Statewide Assessments

The CA Assessment Accessibility Resources Matrix describes the embedded and non-embedded universal tools, designated supports, and accommodations (UDAs) allowed as part of the CAASPP and English Language Proficiency Assessments for California (ELPAC).

　i.　Desired Results Developmental Profile (Preschool Only)

　　◯ Student will participate without adaptations.

　　◯ Student will participate with the following adaptations:

☐ Sensory support	☐ Assistive equipment or device
☐ Functional positioning	☐ Visual support
☐ Alternative response mode	☐ Other: _____

　ii.　California Assessment of Student Performance and Progress (CAASPP)

　　For each assessment, select the statement describing the student's participation.

SBAC - English Language Arts (Grades 3-8 & 11)	SBAC - Math (Grades 3-8 & 11)	CAST - Science (Grades 5, 8, & High School)	Physical Fitness Test (Grades 5, 7, 9)	
○	○	○	○	Out of testing range
○	○	○	○	Participate without Designated Supports or Accommodations
○	○	○	○	Participate with Designated Supports Embedded:
○	○	○	○	Participate with Accommodations Embedded:
○	○	○	○	Participate with Accommodations Non-embedded:
○	○	○	○	Participate with Accessibility Support (requires CDE Approval):
○	○	○	○	Alternate Assessment without Designated Supports or Accommodations
○	○	○	○	Alternate Assessment with Designated Supports Embedded:
○	○	○	○	Alternate Assessment with Designated Supports Non-embedded:
○	○	○	○	Alternate Assessment with Accommodations Embedded:
○	○	○	○	Alternate Assessment with Accommodations Non-embedded:
○	○	○	○	Alternate Assessment with Accessibility Support (requires CDE Approval):

iii. English Language Proficiency Assessments of California (ELPAC; for multilingual learners only, see Section 3f).

The student will participate in the:

| ○ Initial ELPAC
○ Summative ELPAC | ○ Without designated supports (All domains)
○ Designated supports (All domains):
○ Without accommodations (All domains)
○ Accommodations (All domains):
○ Domain exemption
  ☐ Oral language composite
    ☐ Listening ☐ Speaking
  ☐ Written language composite
    ☐ Reading ☐ Writing
○ Alternate ELPAC
    ☐ Expressive (Speaking & Writing)
    ☐ Receptive (Listening & Reading)
○ Alternate ELPAC Designated Supports | Accommodations Embedded:
Non-embedded: |

iv. Alternate Assessment. If the student will not participate in a regular state assessment (with or without accommodations), explain why the student cannot participate in the regular assessment and why the selected assessment option is appropriate (see CDE Guidance for IEP teams regarding participation in the California Alternate Assessments and the Alternate English Language Proficiency Assessments for California):

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11. Meeting Participants

[34 CFR §300.321, 322, 324(b)(3); EC sections 56341(b)(1), (b)(2), (c)-(d), (f)-(i), 56341.5]

i. IEP meeting names and whether they were present for the development of this IEP.

Student: _____   ◯ Yes   ◯ No
Student participation is required for students age 14 or older and highly recommended for all students.

> If the student (age 14 or older) did not attend, steps to ensure the students preferences and interests were considered.

Required for all students

Parent/Guardian or family member: _____   ◯ Yes   ◯ No
Parent/Guardian or family member: _____   ◯ Yes   ◯ No
Student's general education teacher(s): _____   ◯ Yes   ◯ No
Student's special education teacher(s): _____   ◯ Yes   ◯ No
Student's service provider(s): _____   ◯ Yes   ◯ No
Student's service provider(s): _____   ◯ Yes   ◯ No
LEA representative: _____   ◯ Yes   ◯ No

Required for the first IEP meeting for a child transitioning from Early Start

Part C service provider or coordinator: _____   ◯ Yes   ◯ No

Required for students age 14 or older, recommended any student receiving other services

Other agency representative: _____   ◯ Yes   ◯ No

Other Participants (Name, Role): _____

_____

_____

For each "No" checkbox that is checked above for a required meeting participant, written input has been provided and attached and an excusal form has been completed and attached:

◯ Yes   ◯ No

12. Parent/Guardian/Student Signature

[34 CFR §300.9]

A parent/guardian (or student age 18-21) may agree to all or some of the components of a proposed IEP.

◯ Parent/Guardian (or student age 18-21) agrees to all components of the proposed IEP

◯ Parent/Guardian (or student age 18-21) agrees to all components of the proposed IEP except for:

Items of disagreement.

◯ Parent/Guardian (or student age 18-21) does not agree with any of the components in the proposed IEP

Signature : _____ Date : _____

◯ Parent   ◯ Guardian   ◯ Surrogate Parent   ◯ Foster Parent
◯ Student age 18-21   ◯ Emancipated Minor

13. Procedural Safeguards

[34 CFR §300.320(c), 56345(g)]

I have been provided the special education procedural safeguards in my native language or other mode of communication.

◯ Offered and accepted   ◯ Offered and declined

Signature: _____ Date: _____

13a. Transfer of Rights and Age of Majority (required for students age 18 or older)

I have been informed of the transfer of rights at the age of 18 years.

Signature of Student: _____ Date: _____

Signature of Parent/Guardian: _____ Date: _____

14. Communication about the IEP

Agreed upon method for the school to communicate with the student and family about the IEP, including under emergency conditions in which instruction or services, or both, cannot be provided to the pupil either at the school or in person for more than 10 school days.

IEP Summaries

The workgroup recommended the development of summaries of the most relevant information from the IEP that can be individualized based on the needs of the student (see Online IEP System Recommendation 3). Three sample summaries are included, but the intention of the workgroup is that the IEP team would determine which information is useful for each member of the IEP team in a summary.

The summaries are intended to be in addition to the copy of the IEP each member receives, removing information that was important for the development of the IEP but that is less important for its implementation (e.g., the justifications behind decisions made).

Annual Individualized Education Program (IEP)　　**IEP Dates: _____ to _____**
General Education Teacher Summary

Student name and pronouns: _____	School district: _____
Student ID number: _____ Grade: _____	School of residence or choice: _____
Student birthdate and age: _____	School the student attends (if different): ___
Primary language of the student: _____	IEP type (circle one):
Primary language(s) of the family/guardian: _____	Initial Annual Amendment

1. Student Strengths, Interests, Preferences, and Learning Needs

1a. Strengths

(Student) I am particularly good at:

(Family/Guardian) Our child/young adult's strengths are:

(Teachers and Service Providers) The student's strengths at school and with their peers are:

1b. Interests

(Student) I am interested in and like to:

(Other Team Members) The student also has expressed interests in and preferences for:

1c. Learning and Communication Preferences

(Student) I learn and experience school best in these ways and with these supports:

(Student) I communicate in these ways:

1d. Learning Needs

(Family/Guardian) Our concerns and priorities for our child/young adult's education this year are:

(Teachers and Service Providers) Our priorities for the student's learning and making progress in the general education curriculum this year are:

(IEP Team) This information from formal and informal evaluations, including progress toward previous goals, is most important to consider in developing this IEP and informing instructional strategies:

4. Plan for Achieving Academic, Functional, and Post-School Outcomes

4a. Present Levels of Performance

Present levels of performance as determined using multiple measures across learning modalities and settings. Includes how the student's disability affects their participation and progress in the general education curriculum (i.e., the same curriculum as for nondisabled children) and for preschool children, as appropriate, how the disability affects the child's participation in appropriate activities.

Academic performance	Communication, social-emotional, functional, behavior, and other performance	(required for students age 14 or older) **Results of transition assessment(s) related to** training or education, competitive integrated employment, and independent and/or supported living (as appropriate)

To inform standards-based goals, the **student's status related to the grade-level content standards in the student's current grade and in the highest grade the student will participate in during the period of this IEP**, including standards met, with and without accommodations, and standards the student needs support to meet.

How the disability affects the child or student's participation in routines and activities including those related to academic learning including pre-literacy and pre-numeracy, inside and outside the classroom. (required for preschool children, optional for other students)

Routine or Activity	Impact of Disability (positive or negative)

4b. Annual, Measurable IEP Goal(s)

Short-term objectives to meet each goal are required for students who take alternate assessments aligned to alternate academic standards and optional for others.

Standards-based academic goal(s)	Communication, social-emotional, functional, behavior, and other goal(s)	(required for students age 14 or older) **Post-school goal(s)** for training or education, competitive integrated employment, and independent and/or supported living (as appropriate)

Progress toward each goal. How and how frequently will the student's progress toward each goal be measured and reported?

Goal #	Mechanism	Frequency

4c. Instructional Strategies to Meet Annual Goals

Strategies (e.g., embedded systematic instruction, peer supports, use of graphic organizers) to be used in the general education setting to support the student to make progress toward their academic goals.

Academic strategies	Communication, social-emotional, functional, behavior, and other strategies	(required for students age 14 or older) Strategies related to secondary transition

4d. Family Engagement and Partnership

How the IEP team will support the family, including strategies to help the family support the student.

Academic supports	Communication, social-emotional, functional, behavior, and other supports	(required for students age 14 or older) Supports related to secondary transition

5. Nonacademic, Extracurricular, and Social Activities

How the student will participate in nonacademic, extracurricular, and social activities with their nondisabled peers, including any activities and community experiences to support post-school goals.

6. Accommodations, Special Education and Related Services, and Program Modifications

6a. Accommodations

Accommodation	Title(s) of Professional Staff Responsible	Needed for Assessments (Y/N)	Related Goal(s) and Areas of Need Addressed

6b. Program Modifications

Program Modification	Title(s) of Professional Staff Responsible	Related Goal(s) and Areas of Need Addressed

6c. Special Education and Related Services

Special Education or Related Service	Title of Professional Staff Responsible	Frequency and Duration Use only one column for each service, document by minutes.			Location	Dates of Service		Related Goal(s) and Areas of Need Addressed
		Per Day	Per Week	Per Month		Start	End	
i. Consultation (Indirect Services to School Personnel and Parents/Guardians)								
Total Minutes (Indirect Services)								
ii. Special Education and Related Services in the General Education Classroom (Direct Services)								
Total Minutes								
iii. Special Education and Related Services in Other Settings (Direct Services)								
Total Minutes								

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Services outside of special education the student is receiving **at school** that should be considered as part of the student's educational plan (e.g., supplemental tutoring, enrichment courses, counseling)

Services outside of school (private or public) the student is currently receiving or needs to receive.

Agency or Provider Name	Service(s) Currently Receiving or Needed (if needed, how the service will be accessed, or a referral provided)

14. Communication about the IEP

Agreed upon method for the school to communicate with the student and family about the IEP, including under emergency conditions in which instruction or services, or both, cannot be provided to the pupil either at the school or in person for more than 10 school days.

Annual Individualized Education Program (IEP)　　　　**IEP Dates: _____ to _____**
Parent/Guardian Summary

Student name and pronouns: _____	School district: _____
Student ID number: _____ Grade: _____	School of residence or choice: _____
Student birthdate and age: _____	School the student attends (if different): ___
Primary language of the student: _____	IEP type (circle one):
Primary language(s) of the family/guardian: _____	Initial Annual Amendment

1. Student Strengths, Interests, Preferences, and Learning Needs

1a. Strengths

(Student) I am particularly good at:

(Family/Guardian) Our child/young adult's strengths are:

(Teachers and Service Providers) The student's strengths at school and with their peers are:

1b. Interests

(Student) I am interested in and like to:

(Other Team Members) The student also has expressed interests in and preferences for:

1c. Learning and Communication Preferences

(Student) I learn and experience school best in these ways and with these supports:

(Student) I communicate in these ways:

1d. Learning Needs

(Family/Guardian) Our concerns and priorities for our child/young adult's education this year are:

(Teachers and Service Providers) Our priorities for the student's learning and making progress in the general education curriculum this year are:

(IEP Team) This information from formal and informal evaluations, including progress toward previous goals, is most important to consider in developing this IEP and informing instructional strategies:

2. Vision for the Future and Pathway to a High School Diploma

2a. High School Graduation Date – Projected date of graduation with a high school diploma: _____

2b. Student Vision for the Future

Next week I want to / I want my child or young adult to:

In **one year**, I want to / I want my child or young adult to:

In **three years**, I want to / I want my child or young adult to:

In **five to ten years**, I want to / I want my child or young adult to:

After I leave high school, I want to / I want my child or young adult to: (required for students age 14 and older)

2c. Course of Study (required for students who will participate in 8th grade or higher during this IEP)

Course of study that will lead to a high school diploma.

2d. Important Transitions on the Pathway to a High School Diploma

☐ None
☐ Entering preschool from early intervention
☐ Entering elementary school (Kindergarten)
☐ Entering middle school
☐ Entering high school
☐ Leaving high school
☐ Transitioning to a new school

☐ Transitioning from a nonpublic placement
☐ Transitioning to more or less time in general education
☐ Transitioning between available methods to participate in school (e.g., independent study, distance, hybrid, in-person learning
☐ Other (specify): _____

How the student has been or will be prepared for any upcoming transitions and any supports needed to ensure a smooth transition.

4. Plan for Achieving Academic, Functional, and Post-School Outcomes

4a. Present Levels of Performance

Present levels of performance as determined using multiple measures across learning modalities and settings. Includes how the student's disability affects their participation and progress in the general education curriculum (i.e., the same curriculum as for nondisabled children) and for preschool children, as appropriate, how the disability affects the child's participation in appropriate activities.

Academic performance	Communication, social-emotional, functional, behavior, and other performance	(required for students age 14 or older) **Results of transition assessment(s) related to** training or education, competitive integrated employment, and independent and/or supported living (as appropriate)

To inform standards-based goals, the **student's status related to the grade-level content standards in the student's current grade and in the highest grade the student will participate in during the period of this IEP**, including standards met, with and without accommodations, and standards the student needs support to meet.

How the disability affects the child or student's participation in routines and activities including those related to academic learning including pre-literacy and pre-numeracy, inside and outside the classroom. (required for preschool children, optional for other students)

Routine or Activity	Impact of Disability (positive or negative)

4b. Annual, Measurable IEP Goal(s)

Short-term objectives to meet each goal are required for students who take alternate assessments aligned to alternate academic standards and optional for others.

Standards-based academic goal(s)	Communication, social-emotional, functional, behavior, and other goal(s)	(required for students age 14 or older) **Post-school goal(s)** for training or education, competitive integrated employment, and independent and/or supported living (as appropriate)

Progress toward each goal. How and how frequently will the student's progress toward each goal be measured and reported?

Goal #	Mechanism	Frequency

4d. Family Engagement and Partnership

How the IEP team will support the family, including strategies to help the family support the student.

Academic supports	Communication, social-emotional, functional, behavior, and other supports	(required for students age 14 or older) Supports related to secondary transition

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5. Nonacademic, Extracurricular, and Social Activities

How the student will participate in nonacademic, extracurricular, and social activities with their nondisabled peers, including any activities and community experiences to support post-school goals.

6. Accommodations, Special Education and Related Services, and Program Modifications

6a. Accommodations

Accommodation	Title(s) of Professional Staff Responsible	Needed for Assessments (Y/N)	Related Goal(s) and Areas of Need Addressed

6b. Program Modifications

Program Modification	Title(s) of Professional Staff Responsible	Related Goal(s) and Areas of Need Addressed

6c. Special Education and Related Services

Special Education or Related Service	Title of Professional Staff Responsible	Frequency and Duration. Use only one column for each service, document by minutes.			Location	Dates of Service		Related Goal(s) and Areas of Need Addressed
		Per Day	Per Week	Per Month		Start	End	
i. Consultation (Indirect Services to School Personnel and Parents/Guardians)								
Total Minutes (Indirect Services)								
ii. Special Education and Related Services in the General Education Classroom (Direct Services)								
Total Minutes								
iii. Special Education and Related Services in Other Settings (Direct Services)								
Total Minutes								

119

Services outside of special education the student is receiving **at school** that should be considered as part of the student's educational plan (e.g., supplemental tutoring, enrichment courses, counseling)

Services outside of school (private or public) the student is currently receiving or needs to receive.

Agency or Provider Name	Service(s) Currently Receiving or Needed (if needed, how the service will be accessed, or a referral provided)

8. Transportation as a Related Service

Does the student need transportation to access and benefit from special education and related services? ◯ Yes ◯ No

If Yes, transportation will be provided:

◯ On a regular transportation vehicle with the following modifications and/or specialized equipment and precautions:

◯ On a special transportation vehicle with the following modifications and/or specialized equipment and precautions:

14. Communication about the IEP

Agreed upon method for the school to communicate with the student and family about the IEP, including under emergency conditions in which instruction or services, or both, cannot be provided to the pupil either at the school or in person for more than 10 school days.

Annual Individualized Education Program (IEP)   **IEP Dates: _____ to _____**
Emergency Conditions Summary

Student name and pronouns: _____	School district: _____
Student ID number: _____ Grade: _____	School of residence or choice: _____
Student birthdate and age: _____	School the student attends (if different): ___
Primary language of the student: _____	IEP type (circle one):
Primary language(s) of the family/guardian: _____	Initial Annual Amendment

1. Student Strengths, Interests, Preferences, and Learning Needs

1c. Learning and Communication Preferences

(Student) I learn and experience school best in these ways and with these supports:

(Student) I communicate in these ways:

3. Special Factors

3a. Behavior. Are there behavioral interventions, supports, or other strategies, in addition to any schoolwide or typical classroom supports, needed to address behavior that impedes the student's learning or the learning of others?   ◯ Yes   ◯ No

3b. Blindness and Visual Impairments. Is the student blind or visually impaired?   ◯ Yes   ◯ No

3c. Communication Needs and Deaf or Hard of Hearing. Does the student have communication needs? Is the student deaf or hard of hearing?   ◯ Yes   ◯ No

3d. Assistive Technology Devices and Services. Does the student need assistive technology devices and services?   ◯ Yes   ◯ No

3e. Individualized Health Plan. Does the student have medical conditions that require an Individualized Health Plan (IHP)?   ◯ Yes   ◯ No

3f. Multilingual Learner. Is the student an emerging multilingual learner?   ◯ Yes   ◯ No

3g. Emergency Conditions

Considerations for how the student will receive any needed accommodations or services due to special factors including ELD services under emergency conditions in which instruction or services, or both, cannot be provided to the student either at the school or in person for more than 10 school days during the board-approved instructional academic year.

4. Plan for Achieving Academic, Functional, and Post-School Outcomes

4b. Annual, Measurable IEP Goal(s)

Standards-based academic goal(s)	Communication, social-emotional, functional, behavior, and other goal(s)	(required for students age 14 or older) **Post-school goal(s)** for training or education, competitive integrated employment, and independent and/or supported living (as appropriate)

4d. Family Engagement and Partnership

How the IEP team will support the family, including strategies to help the family support the student.

Academic supports	Communication, social-emotional, functional, behavior, and other supports	(required for students age 14 or older) Supports related to secondary transition

4e. Emergency Conditions

Considerations for how the student's goals can be met under emergency conditions in which instruction or services, or both, cannot be provided to the student either at the school or in person for more than 10 school days during the board-approved instructional academic year.

Academic considerations	Communication, social-emotional, functional, behavior, and other considerations	(required for students age 14 or older) Considerations related to secondary transition

5. Nonacademic, Extracurricular, and Social Activities

5e. Emergency Conditions

Considerations for how the student will have access to nonacademic, extracurricular, and social activities under emergency conditions in which instruction or services, or both, cannot be provided to the student either at the school or in person for more than 10 school days during the board-approved instructional academic year.

6. Accommodations, Special Education and Related Services, and Program Modifications

6e. Emergency Conditions

Considerations for how the student will receive the accommodations, modifications, and special education and related services in this IEP under emergency conditions in which instruction or services, or both, cannot be provided to the student either at the school or in person for more than 10 school days during the board-approved instructional academic year.

7. Least Restrictive Environment

7d. Emergency Conditions

Considerations for how the student will have access to general education instruction and general education peers under emergency conditions in which instruction or services, or both, cannot be provided to the student either at the school or in person for more than 10 school days during the board-approved instructional academic year.

9. Extended School Year

9c. Emergency Conditions

Considerations for how the student will have access to extended school year services under emergency conditions in which instruction or services, or both, cannot be provided to the student either at the school or in person for more than 10 school days during the board-approved instructional academic year.

14. Communication about the IEP

Agreed upon method for the school to communicate with the student and family about the IEP, including under emergency conditions in which instruction or services, or both, cannot be provided to the pupil either at the school or in person for more than 10 school days.

Appendix G. IEP Content Requirements

The table below includes the requirements in the Individuals with Disabilities Education Act (IDEA) regulations related to IEPs and indicates where California Education Code or the California Code of Regulations have requirements that are different from or in addition to the IDEA requirements.

IDEA Regulatory Requirements (34 CFR §300)	California Education Code Requirements (Title 2, Division 4, Part 30)	California Code of Regulations Requirements (Title 5, Division 1, Chapter 3)	Corresponding Proposed IEP Template Section(s)
None	Section 56341.1 (h) It is the intent of the Legislature that the individualized education program team meetings be nonadversarial and convened solely for the purpose of making educational decisions for the good of the individual with exceptional needs.	None	All
§300.320 Definition of an IEP. [IEP must include] (a)(1) A statement of the child's present levels of academic achievement and functional performance, including— (i) How the child's disability affects the child's involvement and progress in the general education curriculum (i.e., the same curriculum as for nondisabled children); or (ii) For preschool children, as appropriate, how the disability affects the child's participation in appropriate activities;	Section 56345(a)(1)	None	Section 4a. Present Levels of Performance
[IEP must include] (a)(2)(i) A statement of measurable annual goals, including academic and functional goals designed to— (A) Meet the child's needs that result from the child's disability to enable the child to be involved in and make progress in the general education curriculum; and (B) Meet each of the child's other educational needs that result from the child's disability; (ii) For children with disabilities who take alternate assessments aligned to alternate academic achievement standards, a description of benchmarks or short-term objectives;	Section 56345(a)(2)	None	Section 4b. Annual, Measurable IEP Goal(s)
[IEP must include] (a)(3) A description of— (i) How the child's progress toward meeting the annual goals described in paragraph (2) of this section will be measured; and (ii) When periodic reports on the progress the child is making toward meeting the annual goals (such as through the use of quarterly or other periodic reports, concurrent with the issuance of report cards) will be provided;	Section 56345(a)(3)	None	Section 4b. Annual, Measurable IEP Goal(s)

IDEA Regulatory Requirements (34 CFR §300)	California Education Code Requirements (Title 2, Division 4, Part 30)	California Code of Regulations Requirements (Title 5, Division 1, Chapter 3)	Corresponding Proposed IEP Template Section(s)
[IEP must include] (a)(4) A statement of the special education and 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— (i) To advance appropriately toward attaining the annual goals; (ii) To be involved in and make progress in the general education curriculum in accordance with paragraph (a)(1) of this section, and to participate in extracurricular and other nonacademic activities; and (iii) To be educated and participate with other children with disabilities and nondisabled children in the activities described in this section;	Section 56345(a)(4)	None	Section 6c. Special Education and Related Services Section 5. Nonacademic, Extracurricular, and Social Activities Section 7. Least Restrictive Environment
[IEP must include] (a)(5) An explanation of the extent, if any, to which the child will not participate with nondisabled children in the regular class and in the activities described in paragraph (a)(4) of this section;	Section 56345(a)(5)	None	Section 7. Least Restrictive Environment
[IEP must include] (a)(6)(i) A statement of any individual appropriate accommodations that are necessary to measure the academic achievement and functional performance of the child on State and districtwide assessments consistent with section 612(a)(16) of the Act; and (ii) If the IEP Team determines that the child must take an alternate assessment instead of a particular regular State or districtwide assessment of student achievement, a statement of why— (A) The child cannot participate in the regular assessment; and (B) The particular alternate assessment selected is appropriate for the child;	Section 56345(a)(6)	None	Section 10. Participation in Local (e.g., Districtwide) and Statewide Assessments
[IEP must include] (a)(7) The projected date for the beginning of the services and modifications described in paragraph (a)(4) of this section, and the anticipated frequency, location, and duration of those services and modifications.	Section 56345(a)(7)	None	Section 6. Accommodations, Special Education and Related Services, and Program Modifications
(b) *Transition services.* Beginning not later than the first IEP to be in effect when the child turns 16, or younger if determined appropriate by the IEP Team, and updated annually, thereafter, the IEP must include— (1) Appropriate measurable postsecondary goals based upon age appropriate transition assessments related to training, education, employment, and, where appropriate, independent living skills; (2) The transition services (including courses of study) needed to assist the child in reaching those goals.	Section 56345(a)(8)	None	Section 4b. Annual, Measurable IEP Goal(s) Section 6. Accommodations, Special Education and Related Services, and Program Modifications Section 2c. Course of Study

IDEA Regulatory Requirements (34 CFR §300)	California Education Code Requirements (Title 2, Division 4, Part 30)	California Code of Regulations Requirements (Title 5, Division 1, Chapter 3)	Corresponding Proposed IEP Template Section(s)
None	Section 56345(a)(9) (A) A description of the means by which the individualized education program will be provided under emergency conditions, as described in Section 46392, in which instruction or services, or both, cannot be provided to the pupil either at the school or in person for more than 10 school days. The description shall include all of the following: (i) Special education and related services. (ii) Supplementary aids and services. (iii) Transition services, as defined in Section 56345.1 (iv) Extended school year services pursuant to Section 300.106 of Title 34 of the Code of Federal Regulations. (B) Subparagraph (A) shall apply, on or after the operative date of this paragraph, to the development of an initial individualized education program or the next regularly scheduled revision of an individualized education program that has not already met the requirements of subparagraph (A). (C) Public health orders shall be taken into account in implementing subparagraph (A).	None	Sections 3f.vi, 4e, 5a, 6e, 7d, 9c, and 14. Emergency Conditions
None	Section 56345 (b) If appropriate, the individualized education program shall also include, but not be limited to, all of the following: (1) For pupils in grades 7 to 12, inclusive, any alternative means and modes necessary for the pupil to complete the prescribed course of study of the district and to meet or exceed proficiency standards for graduation.	None	Section 2a. High School Graduation Date Section 2c. Course of Study
None	Section 56345(b)(4) Provision for the transition into the regular class program if the pupil is to be transferred from a special class or nonpublic, nonsectarian school into a regular class in a public school for any part of the schoolday, including both of the following: (A) A description of activities provided to integrate the pupil into the regular education program. The description shall indicate the nature of each activity, and the time spent on the activity each day or week. (B) A description of the activities provided to support the transition of pupils from the special education program into the regular education program.	None	Section 2d. Important Transitions on the Pathway to a High School Diploma

IDEA Regulatory Requirements (34 CFR §300)	California Education Code Requirements (Title 2, Division 4, Part 30)	California Code of Regulations Requirements (Title 5, Division 1, Chapter 3)	Corresponding Proposed IEP Template Section(s)
None	Section 56345(b)(5) For pupils with low-incidence disabilities, specialized services, materials, and equipment, consistent with guidelines established pursuant to Section 56136.	None	Section 3b. Blindness and Visual Impairments Section 3c. Communication Needs and Deaf or Hard of Hearing
(c) *Transfer of rights at age of majority.* Beginning not later than one year before the child reaches the age of majority under State law, the IEP must include a statement that the child has been informed of the child's rights under Part B of the Act, if any, that will transfer to the child on reaching the age of majority under §300.520.	Section 56345(g)	None	Section 13a. Transfer of Rights and Age of Majority
§300.321 IEP Team. (a) *General.* The public agency must ensure that the IEP Team for each child with a disability includes— (1) The parents of the child; (2) Not less than one regular education teacher of the child (if the child is, or may be, participating in the regular education environment); (3) Not less than one special education teacher of the child, or where appropriate, not less than one special education provider of the child; (4) A representative of the public agency who— (i) Is qualified to provide, or supervise the provision of, specially designed instruction to meet the unique needs of children with disabilities; (ii) Is knowledgeable about the general education curriculum; and (iii) Is knowledgeable about the availability of resources of the public agency. (5) An individual who can interpret the instructional implications of evaluation results, who may be a member of the team described in paragraphs (a)(2) through (a)(6) of this section; (6) At the discretion of the parent or the agency, other individuals who have knowledge or special expertise regarding the child, including related services personnel as appropriate; and (7) Whenever appropriate, the child with a disability.	Section 56341(b) (1) One or both of the pupil's parents, a representative selected by a parent, or both… (2) Not less than one regular education teacher of the pupil, if the pupil is, or may be, participating in the regular education environment. If more than one regular education teacher is providing instructional services to the individual with exceptional needs, one regular education teacher may be designated by the local educational agency to represent the others. Section 56341(c) (c) In accordance with Sections 300.308 and 300.310 of Title 34 of the Code of Federal Regulations, for a pupil suspected of having a specific learning disability, at least one member of the individualized education program team shall be qualified to conduct individual diagnostic examinations of children, such as a school psychologist, speech-language pathologist, or remedial reading teacher. In accordance with Section 300.310 of Title 34 of the Code of Federal Regulations, at least one team member shall observe the pupil's academic performance and behavior in the areas of difficulty in the pupil's learning environment, including in the regular classroom setting. In the case of a child who is less than schoolage or out of school, a team member shall observe the child in an environment appropriate for a child of that age.	None	Section 11. Meeting Participants

IDEA Regulatory Requirements (34 CFR §300)	California Education Code Requirements (Title 2, Division 4, Part 30)	California Code of Regulations Requirements (Title 5, Division 1, Chapter 3)	Corresponding Proposed IEP Template Section(s)
(b) *Transition services participants.* (1) In accordance with paragraph (a)(7) of this section, the public agency must invite a child with a disability to attend the child's IEP Team meeting if a purpose of the meeting will be the consideration of the postsecondary goals for the child and the transition services needed to assist the child in reaching those goals under §300.320(b). (2) If the child does not attend the IEP Team meeting, the public agency must take other steps to ensure that the child's preferences and interests are considered. (3) To the extent appropriate, with the consent of the parents or a child who has reached the age of majority, in implementing the requirements of paragraph (b)(1) of this section, the public agency must invite a representative of any participating agency that is likely to be responsible for providing or paying for transition services.	Section 56341(d)	None	Section 11. Meeting Participants
(e) *IEP Team attendance.* (1) A member of the IEP Team described in paragraphs (a)(2) through (a)(5) of this section is not required to attend an IEP Team meeting, in whole or in part, if the parent of a child with a disability and the public agency agree, in writing, that the attendance of the member is not necessary because the member's area of the curriculum or related services is not being modified or discussed in the meeting.	Section 56341(f)	None	Section 11. Meeting Participants
(2) A member of the IEP Team described in paragraph (e)(1) of this section may be excused from attending an IEP Team meeting, in whole or in part, when the meeting involves a modification to or discussion of the member's area of the curriculum or related services, if— (i) The parent, in writing, and the public agency consent to the excusal; and (ii) The member submits, in writing to the parent and the IEP Team, input into the development of the IEP prior to the meeting.	Section 56341(g) Section 56341 (h) A parent's agreement under subdivision (f) and consent under subdivision (g) shall be in writing.	None	Section 11. Meeting Participants
(f) *Initial IEP Team meeting for child under Part C.* In the case of a child who was previously served under Part C of the Act, an invitation to the initial IEP Team meeting must, at the request of the parent, be sent to the Part C service coordinator or other representatives of the Part C system to assist with the smooth transition of services.	Section 56341(i)	None	Section 2d. Important Transitions on the Pathway to a High School Diploma Section 11. Meeting Participants
§300.322 Parent participation. (a) *Public agency responsibility—general.* Each public agency must take steps to ensure that one or both of the parents of a child with a disability are present at each IEP Team meeting or are afforded the opportunity to participate, including— (1) Notifying parents of the meeting early enough to ensure that they will have an opportunity to attend; and (2) Scheduling the meeting at a mutually agreed on time and place.	Section 56341.5	None	Section 11. Meeting Participants

IDEA Regulatory Requirements (34 CFR §300)	California Education Code Requirements (Title 2, Division 4, Part 30)	California Code of Regulations Requirements (Title 5, Division 1, Chapter 3)	Corresponding Proposed IEP Template Section(s)
§300.324 Development, review, and revision of IEP. (a) *Development of IEP*—(1) *General.* In developing each child's IEP, the IEP Team must consider— (i) The strengths of the child; (ii) The concerns of the parents for enhancing the education of their child; (iii) The results of the initial or most recent evaluation of the child; and (iv) The academic, developmental, and functional needs of the child.	Section 56341.1(a) Section 56341.1 (f) The parent or guardian shall have the right to present information to the individualized education program team in person or through a representative and the right to participate in meetings, relating to eligibility for special education and related services, recommendations, and program planning.	None	Section 1. Student Strengths, Interests, Preferences, and Learning Needs Section 4a. Present Levels of Performance
(2) *Consideration of special factors.* The IEP Team must— (i) In the case of a child whose behavior impedes the child's learning or that of others, consider the use of positive behavioral interventions and supports, and other strategies, to address that behavior;	Section 56341.1(b)(1)	None	Section 3. Special Factors
(ii) In the case of a child with limited English proficiency, consider the language needs of the child as those needs relate to the child's IEP;	Section 56341.1(b)(2) Section 56345 (b)(2) For individuals whose native language is a language other than English, linguistically appropriate goals, objectives, programs, and services.	None	Section 3a. Behavior
(iii) In the case of a child who is blind or visually impaired, provide for instruction in Braille and the use of Braille unless the IEP Team determines, after an evaluation of the child's reading and writing skills, needs, and appropriate reading and writing media (including an evaluation of the child's future needs for instruction in Braille or the use of Braille), that instruction in Braille or the use of Braille is not appropriate for the child;	Section 56341.1(b)(3)	None	Section 3b. Blindness and Visual Impairments
(iv) 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, opportunities for direct communications 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;	Section 56341.1(b)(4)	None	Section 3c. Communication Needs and Deaf or Hard of Hearing
(v) Consider whether the child needs assistive technology devices and services.	Section 56341.1(b)(5)	None	Section 3d. Assistive Technology Devices and Services
None	Section 56341.1(c) If, in considering the special factors described in subdivisions (a) and (b), the individualized education program team determines that a pupil needs a particular device or service, including an intervention, accommodation, or other program modification, in order for the pupil to receive a free appropriate public education, the individualized education program team shall include a statement to that effect in the pupil's individualized education program.	None	Section 3. Special Factors

IDEA Regulatory Requirements (34 CFR §300)	California Education Code Requirements (Title 2, Division 4, Part 30)	California Code of Regulations Requirements (Title 5, Division 1, Chapter 3)	Corresponding Proposed IEP Template Section(s)
(3) *Requirement with respect to regular education teacher.* A regular education teacher of a child with a disability, as a member of the IEP Team, must, to the extent appropriate, participate in the development of the IEP of the child, including the determination of— (i) Appropriate positive behavioral interventions and supports and other strategies for the child; (ii) Supplementary aids and services, program modifications, and support for school personnel consistent with §300.320(a)(4).	Section 56341(b)(2)	None	Section 1. Student Strengths, Interests, Preferences, and Learning Needs Section 6. Accommodations, Special Education and Related Services, and Program Modifications Section 11. Meeting Participants
(b) *Review and revision of IEPs*—(1) *General.* Each public agency must ensure that, subject to paragraphs (b)(2) and (b)(3) of this section, the IEP Team— (i) Reviews the child's IEP periodically, but not less than annually, to determine whether the annual goals for the child are being achieved; and (ii) Revises the IEP, as appropriate, to address— (A) Any lack of expected progress toward the annual goals described in §300.320(a)(2), and in the general education curriculum, if appropriate; (B) The results of any reevaluation conducted under §300.303; (C) Information about the child provided to, or by, the parents, as described under §300.305(a)(2); (D) The child's anticipated needs; or (E) Other matters.	Section 56341.1(d)	None	All Sections
§300.114 LRE requirements. (a) *General.* (1) Except as provided in §300.324(d)(2) (regarding children with disabilities in adult prisons), the State must have in effect policies and procedures to ensure that public agencies in the State meet the LRE requirements of this section and §§300.115 through 300.120. (2) Each public agency must ensure that— (i) To the maximum extent appropriate, children with disabilities, including children in public or private institutions or other care facilities, are educated with children who are nondisabled;	Section 56040.1	None	Section 7. Least Restrictive Environment
(ii) Special classes, separate schooling, or other removal of children with disabilities from the regular educational environment occurs only if the nature or severity of the disability is such that education in regular classes with the use of supplementary aids and services cannot be achieved satisfactorily.	Section 56040.b	None	Section 7. Least Restrictive Environment

IDEA Regulatory Requirements (34 CFR §300)	California Education Code Requirements (Title 2, Division 4, Part 30)	California Code of Regulations Requirements (Title 5, Division 1, Chapter 3)	Corresponding Proposed IEP Template Section(s)
§300.116 Placements. In determining the educational placement of a child with a disability, including a preschool child with a disability, each public agency must ensure that— (a) The placement decision— (1) Is made by a group of persons, including the parents, and other persons knowledgeable about the child, the meaning of the evaluation data, and the placement options; and (2) Is made in conformity with the LRE provisions of this subpart, including §§300.114 through 300.118; (b) The child's placement— (1) Is determined at least annually; (2) Is based on the child's IEP; and (3) Is as close as possible to the child's home; (c) Unless the IEP of a child with a disability requires some other arrangement, the child is educated in the school that he or she would attend if nondisabled; (d) In selecting the LRE, consideration is given to any potential harmful effect on the child or on the quality of services that he or she needs; (e) A child with a disability is not removed from education in age-appropriate regular classrooms solely because of needed modifications in the general education curriculum.	Section 56342(b)	§ 3042. Placement. (a) Specific educational placement means that unique combination of facilities, personnel, location or equipment necessary to provide instructional services to an individual with exceptional needs, as specified in the IEP, in any one or a combination of public, private, home and hospital, or residential settings. (b) The IEP team shall document its rationale for placement in other than the pupil's school and classroom in which the pupil would otherwise attend if the pupil were not disabled. The documentation shall indicate why the pupil's disability prevents his or her needs from being met in a less restrictive environment even with the use of supplementary aids and services.	Section 7. Least Restrictive Environment
None	Section 56342.1. …An individual with exceptional needs shall not be referred to, or placed in, a nonpublic, nonsectarian school unless his or her individualized education program specifies that the placement is appropriate.	None	Section 7. Least Restrictive Environment
§300.117 Nonacademic settings. In providing or arranging for the provision of nonacademic and extracurricular services and activities, including meals, recess periods, and the services and activities set forth in §300.107, each public agency must ensure that each child with a disability participates with nondisabled children in the extracurricular services and activities to the maximum extent appropriate to the needs of that child. The public agency must ensure that each child with a disability has the supplementary aids and services determined by the child's IEP Team to be appropriate and necessary for the child to participate in nonacademic settings.	Section 56345.2 (c)		Section 5. Nonacademic, Extracurricular, and Social Activities
§300.106 Extended school year services. (a) General. (1) Each public agency must ensure that extended school year services are available as necessary to provide FAPE, consistent with paragraph (a)(2) of this section. (2) Extended school year services must be provided only if a child's IEP Team determines, on an individual basis, in accordance with §§300.320 through 300.324, that the services are necessary for the provision of FAPE to the child.	Section 56345 (b)(3) Pursuant to Section 300.106 of Title 34 of the Code of Federal Regulations, extended school year services shall be included in the individualized education program and provided to the pupil if the individualized education program team of the pupil determines, on an individual basis, that the services are necessary for the provision of a free appropriate public education to the pupil.	§ 3043. Extended School Year. (d) An extended year program shall be provided for a minimum of 20 instructional days, including holidays. (e) An extended year program, when needed, as determined by the IEP team, shall be included in the pupil's IEP.	Section 9. Extended School Year

Appendix H. Other Relevant Forms That are not Part of the IEP Template

As described in the report, the IDEA lays out the content and structure for developing the IEP. There are a number of forms that are commonly used, associated with, and often included in the IEP that are not required to be part of the IEP itself. As a result, the content and structure of these forms was considered to be beyond the scope of the workgroup's charge and those forms could continue to be determined locally. The workgroup did not make a recommendation for the state to standardize any of these forms, however the state could review these forms to determine whether there is value in establishing statewide versions, sharing samples or model forms, or taking other related actions. A sample of administrative data form is included in this appendix, but the details of this form may not be amenable to standardization across the state due to the lack of a statewide student information system and the overlap in data collected about the student and from the parents/guardians.

These forms include:

- Pre-meeting Forms to Gather Input from IEP Team Members

- Administrative Data Form

- Documentation of the Eligibility Determination

- Documentation of the Need for and Consent for Reevaluation

- Behavior Intervention Plan (BIP)

- IEP Team Member Excusal Form

- Consent to Bill Public Insurance

Student Administrative Data

Sample form adapted from the Massachusetts Department of Elementary and Secondary Education's Administrative Data Sheet, retrieved from https://www.doe.mass.edu/sped/iep/forms/english/.

This form is a supplement to the annual IEP to ensure correct administrative data. The school district may update this information directly in its student information system (SIS) and confirm with parents. It is not a required section of the IEP document.

STUDENT INFORMATION

Full Name:_____ Student ID#:_____ Birth Date:_____
Preferred Name:_____ Pronouns: _____ Gender: ☐Male ☐Female ☐ Nonbinary
Primary Language:_____ Language of Instruction: _____ Grade/Level:_____
Address:_____ Home Telephone: _____ If
18 or older: ☐ Acting on Own Behalf   ☐ Court Appointed Guardian: _____

PARENT/GUARDIAN INFORMATION

Name:_____ Relationship to Student: _____
Address:_____
Home Telephone:_____ Other Telephone: _____
Primary Language of parent/guardian: _____

PARENT/GUARDIAN INFORMATION

Name:_____ Relationship to Student: _____
Address:_____
Home Telephone:_____ Other Telephone: _____
Primary Language of parent/guardian: _____

ELIGIBILITY AND IEP MEETING INFORMATION

Special Education Eligibility Category: _____

Date of Most Recent IEP:_____ Next Scheduled IEP Review Meeting:_____
Date of Most Recent Evaluation:_____ Next Planned Three-Year Reevaluation:_____

DISTRICT AND SCHOOL INFORMATION

School Name:_____ Telephone:_____
Address:_____
Contact Person:_____ Role:_____ Telephone:_____

District Name:_____ Telephone:_____
Address:_____
Contact Person:_____ Role:_____ Telephone:_____

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