



Tips for Facilitating Successful Virtual IEP Meetings During the Pandemic and Beyond

[Slide 1 – Tips for Facilitating Successful Virtual IEP Meetings During the Pandemic and Beyond]:

Tessie Bailey: Hi, everyone. Welcome to today's webinar, tips for facilitating successful virtual IEP meetings during COVID and beyond. Today's webinar is sponsored by PROGRESS Center, funded by OSEP, aimed at progress for students with disabilities.

Today's webinar will be recorded and posted on the website, promotingprogress.org. Accessible handouts are in the handout section on the panel on your right-hand side.

You will also see a link to closed captioning in the chat box.

[Slide 2 – Webinar Format and Questions]: Tessie Bailey: All participants will be muted throughout the presentation. However, you may submit a question at any time into the question pod, which looks like the image shown here.

If you have technical questions or issues, a webinar team member will try to assist you as soon as possible. However, if you have some content-related questions, there will be a Q&A at the end of the presentation, so we will save those and share those with our presenters.

[Slide 3 – Introductions]: Tessie Bailey: So, my name is Dr. Tessie Bailey. I'm the Director of the PROGRESS Center. I am pleased to serve as the webinar coordinator today and introduce our speakers.

Our first guest is Emily Surapaneni, a special education process coordinator for Columbia Public Schools in Columbia, Missouri. Her goals are improving and implementing processes related to paperwork and instruction as well as supporting special education teachers at the elementary and middle school levels.

She taught elementary and middle school for five years, with moderate and mild disabilities. She also mentored first-year special education teachers at the University of Missouri.

I'm also pleased to welcome Dr. Kevin Rubenstein, assistant superintendent for student services in Elmhurst Community Unit School District 205, which serves approximately 8800 students in pre-K through transition in the western suburbs of Chicago, Illinois. In this role, he oversees all aspects of special education, section 504 programming, MTSS, and Response to Intervention. In addition to his work with the district, he is past President of the Illinois Alliance of Administrators of Special Education.

He is also the chair of the policy and legislative committee for the Council for Administrators of Special Education. And a member of the policy steering committee for the Council of Exceptional Children. Many of you may have heard him speak last week.

[Slide 4 – Poll]: Tessie Bailey: So, we would like to start off today's session with a brief poll. So, I would like you to take a moment to respond to the poll question. It's really about letting us know what your current experiences with virtual IEP meetings are.

So, as you are completing the poll, I just want to remind folks that there are handouts located in the handout in the right-hand side on your panel. And that you can submit questions for our presenters at any time during this session.

Okay. We'll give you just a couple more seconds. All right. So, let's close our poll. And Lauren, can you give us a sense about what you see in terms of folks' experiences with our virtual IEPs?

Lauren Rosenbauer: Sure. So, it looks like 68%, the vast majority, selected participated in several. 10% selected participated in one. 7% selected planning for future meetings. And 16% selected no experience.

Tessie Bailey: So quite a mixture of experiences in our session today. For those of you who have done a lot of virtual IEP meetings, I recommend sharing some of your tips and tricks. At the end of today's session, I'll have a place where you can share those on our social media so other folks can benefit from your experiences.

[Slide 5 – Welcome to the PROGRESS Center]: Tessie Bailey: Well, I'm pleased to really introduce the PROGRESS Center, which provides information, resources, tools, technical assistance services to support local educators in developing and implementing high-quality educational programs that enable students with disabilities to make progress and meet challenging goals.

And the way we do this is we share guidance, tools, resources based on existing research, state and federal law and policies, and like today, local experiences.

Beginning in our second year, which starts in about a month, we will be partnering with local educators to really begin our local implementation of this work.

[Slide 6 – Promoting Progress for Students with Disabilities]: Tessie Bailey: Now, the center focuses on promoting progress through the development and implementation of high-quality educational programming. So, for students with disabilities, this begins generally with the development of an IEP that is reasonably calculated to enable the child to make appropriate progress in light of the child's circumstances. Or, what you've probably heard from Endrew. The IEP team, whose members are outlined in IDEA are ultimately responsible for its development.



[Slide 7 – Objectives]: Tessie Bailey: The purpose of today's session, and we can go to the next slide, is to really provide some tools and resources to help you facilitate virtual IEP meetings, and also learn how local implementers are successfully implementing virtual IEP meetings.

[Slide 8 – Did You Know?]: Tessie Bailey: Many educators may not be aware that prior to COVID, the IEP team could actually meet with alternative means of participation. And this could have been through videoconferences, conference calls. You may have used FaceTime at some point.

The use of alternative formats does not change other IDEA requirements of the IEP. The components remain the same. The expectations remain the same. And no matter the format of the meeting, all required participants, including parents, should be present and/or appropriately excused from the meeting.

[Slide 9 – Why weren't alternative approaches to participation popular?]: Tessie Bailey: Now, prior to COVID, most schools did not frequently use alternative approaches. And if they were used, they were primarily used for an individual person, right, who wasn't able to attend. Now, many viewed alternative approaches as more informal or as a last resort, so it was often not used as an option for parents or other team members unless there was just no other way for them to be there.

And it was very rare that you would see a school say, would you like to meet virtually or would you like to meet face-to-face when working with parents.

Schools noted that some of the reasons is they were just not familiar with the platforms, or the comfort level with these alternative approaches. I mean, I'm sure most of you can step back to March and April and feeling overwhelmed with learning about Zoom or Google Meet or GoToMeeting or whatever platform that you were using.

So, there's also been this preference for face-to-face meetings because there was this feeling of relationship building, which is really critical to the success of students with disabilities. And what we find sometimes is that in virtual environments, some of us worry that it's really hard to pick up on if a parent is upset or if they're unclear or if they want to say something but they don't know when to interrupt or when to chime in.

And finally, I think what we've seen, and that is really highlighted on the screen, is there was this general lack of infrastructure to support virtual meetings. Right? A lot of us sort of used our FaceTime on our iPhones because it was there, but most of us did not have access to Zoom or Google Meet prior to the spring. So, we couldn't really offer that as an option.

[Slide 10 – Current Context: Where are students learning?]: Tessie Bailey: Now, what's nice, you know, one of the things that might benefit us about the current context is that it's really required us to leverage this alternative approach. And this is something that I think in the end will benefit us both from an educational level and a parent level. If we think about right now, almost half of districts are



open to remote learning, which means kids are not coming into the schools. Other districts are using a hybrid approach, meaning maybe they're doing every other day or every other week. So, kids are not fully in one location or the other.

There is a small percentage, about 24%, who are engaging in full in-person instruction, but even in those cases, there may be parents who feel that the virtual IEP option is still a safer or better option.

Now, we know a lot of schools are moving to a face-to-face maybe after November 1 or maybe in January. But we'll still see that virtual meetings are a viable option for our families, those who feel particularly at risk for COVID or other illnesses, those who struggle with job losses or are trying to manage multiple jobs or caring for folks at home. In some cases, you may actually have team members who have COVID and are not able to attend your meetings.

[Slide 11 – Recent OSEP Guidance]: Tessie Bailey: Now, with this in mind, the PROGRESS Center in collaboration with multiple OSEP-funded centers, including parent centers, developed a suite of resources in both English and Spanish. And what was nice about these resources is it gave us some structure for how we could function within these virtual meeting platforms.

[Slide 12 – But How?]: Tessie Bailey: Now, the one on the right is a PDF and it really outlines what a potential agenda might look like. And the resource on the right side is a Word document that can be adapted, right, for your local content, your own logo, your own timings, your own meeting norms.

[Slide 13 – But How?]: Tessie Bailey: Now, this suite of resources also includes a number of educator and family tip sheets for conducting and participating in a virtual meeting. This is a new way of doing business. So we can't just expect people know how to work within the virtual setting, so these tools really outlined what you would do prior to the meeting to get ready, to try it out, make sure your hair is fixed, to making sure that you're able to connect and use the audio or share what you want to share. And then finally what happens after the meeting.

Now, in the remaining portion of this webinar, we're going to hear from local educators about how they're using these resources or various adaptations to these resources to successfully implement virtual IEPs. Now, before I introduce our speakers on the next slide, I do want to remind folks that you can place tips or questions in our question box that after Emily and Dr. Rubenstein share their tips and tricks, we will share some of those questions.

[Slide 14 – Tips and Lessons Learned from Local Implementation of IEP Meetings]: Tessie Bailey: Now Emily Surapaneni remember is our special education process coordinator for Columbia Public Schools in Missouri. She has been working with educators extensively to help them navigate this virtual IEP meeting.



[Slide 15 – Tips from the Field]: Tessie Bailey: Following her, Dr. Rubenstein from Elmhurst Community Unit School District 205 will share some of their experiences in our large suburban school. So, we're going to go back and we'll get to Emily and we'll pass the slides over to her.

Emily Surapaneni: Okay. Good afternoon. So, I'm Emily Surapaneni. I work right smack in the middle of Missouri. It's where the University of Missouri is located, just to give you some perspective.

We are a big district. We have about 20,000 students and about 2,000 of those students have IEPs. So just kind of put you in perspective there.

We are currently all virtual except for our students with our most significant needs. So, what we would call our district classrooms. We have those in seat.

However, we are one of the districts that are starting to look at getting kids more face-to-face, so we actually have a school board meeting next week and we'll find out more what that will look like. But so far we've started off virtual.

In our district, every student was provided a device to start the year. They were given iPads in elementary and middle school and a laptop for high school. So that just kind of is a little background of what we're working with.

And students could choose to be in virtual for the school year or could choose to follow whatever model the district goes to. So, when we're hybrid, face-to-face, or virtual, but there are some students who elected to be virtual for the entire school year. So, we also kind of have to always keep those students in mind.

In my particular role, I'm called a process coordinator, which I know every district is looked at as different. So I support it -- there are five of us in my district. We support elementary and middle school. We're attending difficult meetings, we're acting as LEA as needed, just lots of meetings, lots of distributed information.

Okay. And then to start the year, just to prove how much I feel like I am in this, we are amending every single IEP in our district. So, like I said, there's 2,000 of them. So every IEP is being amended to start the year to add our distance learning plan, which for us is a form G, or looking at amending for the virtual. So, lots of paperwork happening, lots of meetings happening going on there.

So, I did come up with a list of what I felt like were good practices. We're having a virtual IEP meeting. Some of mine are more related to paperwork or just the setup of the meeting, so I'm going to go through those. You can see that there's tips from the field, like a little handout there that you're welcome to click on and keep for yourself as a reminder.

Okay. So first I always recommend sending the parent a copy of the draft IEP in an email prior to the meeting. Now, sharing IEPs is always good even when we weren't in the virtual world, but what I think



is important now is our parents were used to having that paper copy of that IEP, and that's no longer an option. So if you can get them that copy of the IEP that they can print out so that they have that paper copy and they can review it, I think that helps them feel more comfortable. Not all parents need that, but some do, so I think it's a good way to get things started.

One thing that I think is a really good practice is, when whoever is setting up the IEP meeting, including a waiting room with your virtual option. So, in my district, we use Zoom. I know there are other options that other districts use. But if you have the option to include a waiting room, I find that's helpful. Similar to having your family kind of wait in the office with whoever they brought. Did they bring an advocate, an outside agency? We have them kind of wait in the office while the team is getting themselves prepared. And when we all are ready, we're like, okay, let's go ahead and let the family in. So instead of walking down the hall, it's now just having them in the waiting room and letting them in to your virtual meeting. I think that helps things go smooth and makes sure there's no awkwardness between the members who do show up earlier. So, something that I think is helpful.

One thing I highly recommend is avoiding getting into the IEP system during meetings. So, what I mean by that is, you know, in my district, we use SpedTrack. I know there's 100,000 of them that people are using. But when you are getting in and clicking things and your video is being shared, you never know what other students' names might pop up accidentally, you have tabs open at the top of your screen that might have a person's name. So, you really have to be careful for that confidentiality piece. So just having all documents that you're going to be using prepared ahead of time. The PDF of the IEP, the behavior intervention plan, the data collection information that you're going to share to show the progress. If you want to show the new rubric or probe that you plan to use for your new goal, having that already opened on your computer so all you have to do is click it and it pops open and you don't have to go find it during the meeting.

I also would advise always putting the IEP in a PDF and sharing that versus going into the system and typing it in box by box. And of course everyone has their own preference, but what I find is for those of you who work in the IEP system, you know that not all the boxes print, not all the lines print. It depends on the student's disability, their age, what they need. And so when you're doing it in the system and the parent is seeing you skip around and you're not doing anything, it feels like, are you hiding something, why are you not reviewing that with me. The PDF is what they're familiar with and what they typically would get sent home. So, having that pulled up and going through that to me makes a lot of sense and is just more familiar and comfortable for the family.

Okay. With that said, since you no longer have like that paper copy of the IEP and you're now sharing your screen, I feel like you no longer have that ability to be scribbling down notes as you're going through the meeting. When the parent is giving you their list of concerns and you're hurriedly writing them down, or oops I just saw a typo so I'm going to circle that.



One thing that I found that is helpful, and again, this probably can't happen for every meeting because it depends who will be there, but I always like to find and preassign what I'm calling a friend in the meeting. So, for that, what I think is helpful when I'm attending meetings, I'm often that friend, so I will actually be in the IEP system. And knowing that not everyone maybe has that access. Maybe they're just taking notes in a Word document or something they can send you after. But when the parent is saying all the concerns or whatever and you know as the case manager you're not able to write all that and you're feeling a little flustered and managing lots of things, it's nice to have that friend who can sit there, type it in, take the notes, and then afterward pass those along to you and say, hey, I updated the strengths, I got most of the parent concerns, read them and make sure that sounds right, and I caught the typo in the goal and updated that. That helps you make sure you have all of that ready. So, keep that in mind.

The other thing that I feel like a preassigned friend is helpful for is if you have -- if you are sharing your screen, it is difficult for you to run the chat while you are in your Zoom meeting. So you're kind of going through the IEP, you're focused on that as the presenter, as the facilitator, so you need someone that can watch that chat and can see when the OT says, hey, I have to leave and go to another meeting in 10 minutes, can I pop in after you. Or you're talking about a goal and somebody kind of is like, oh, I have an idea for that, what about this. And they maybe didn't want to interrupt you while you were speaking so they just typed it. So, you need someone who can say, I'm going to pause you real quick, I just saw that we have a comment that we need to address now. Or wait until there's a pause and say, hey, the OT needs to leave a little early today, so let's make sure the parent doesn't have any questions before they leave.

The other thing that I think is helpful is I've been in a few meetings where just like in person you have a few people who are tardy to the meeting, right? So, the mom is very adamant that the counselor is coming to the meeting, I want the counselor there. Okay, great, we are happy to have them. But we also have to watch our time. So, if the meeting is starting on time, if the counselor is late, we do have to get started.

So, what I have found that is helpful is -- and it might be making a different person the host of the Zoom or whatever you're using. And then they can watch for the meeting room alert to pop up and let them in to the meeting. It's kind of, you know, just messes with your flow and all of a sudden you're like, oh, wait, I have to stop sharing, go let in a person, get back to where I was, find where I was, and keep going. So, having someone that can be that friend to kind of help you I think is a good practice.

Another thing that I find, if you guys have been in Zoom meetings, I'm sure you'll have all seen this, but whoever created the meeting is the host, and of course somebody always wants to share who is not the host. "Can I share my screen?" So here you are, you're in your meeting, and someone wants to share their screen. Everyone's comfort level is different. Some people are like, "oh, how do you do that?" And trying to figure it out. So, my advice is, if you know during the meeting that someone is probably going to want to share their screen, go ahead and set up that security before you even get



the meeting rolling. You do have to kind of start the Zoom and go to security and let everyone share their screen, but just doing that at the beginning of the meeting so that it's not, you don't have to pause, you don't have to get flustered figuring out how to do that. I feel like that is helpful. Figuring it out on the fly never goes as smooth as you hope it will. At least my experience.

All right. So, getting people to the meeting. To me, to make it as easy as possible to get school members to your Zoom meeting, we send calendar invites. In my district, we use Outlook. Using that Outlook calendar invite, putting that link in there. Right now, we have links everywhere, right? So just your teachers are teaching and now they need to get off that and they can't run down the hall anymore with their lunch heating up and eat during the meeting. Now, they have to get out of their class and they are like, oh, my gosh, I have to go to a meeting! Where's that link? Well, when that calendar alert pops up and all they have to do is click it, guess what? Everyone is there on time and it's easy. I find that to be super helpful.

Parents. You can't send them that same calendar invite because they don't have the calendar that we share as a district. But, I do advise figuring out what is the easiest way to get them that link. Often in our notices of meeting, we put the link in there and we say, the link is there. But it's difficult for them to find that and type that in or whatever. So, knowing your families: "Should I text them the link because they'll be on their phone and they can just click it and show up? Do I need to email it?"

With that said, some families we know won't be able to attend because it's too difficult or for them to figure out how to do it. So, it's totally okay to have that family attend by phone. I've done several meetings where the parent is on speaker phone with the case manager and the rest of us are on Zoom. It's a little different and challenging because the parent can't see the paperwork. Or maybe they can if they have it pulled up. But typically we can hear each other and it's not been a big problem. That's always a way to go about it.

This of course is related to whatever your district allows, but if do you have a parent that insists on attending in person, what we have done in our district is, because our staff and administrators are allowed to be in the buildings, just not students, we have said that a parent can come in to the building and be in a room socially distanced wearing a mask with the case manager in the room, and then the rest of the team Zooms in. So, they're on the computer or on the smart board and we also are participating together but we have that family member in. Sometimes that's just a hurdle you have to do to get that person to feel comfortable. I had a family member who was like, I just need to be in. She has six foster kids, she was a little bit older. She was like, I just have to be in person; it helps me. We were like, okay, let's do it. It just kind of helped her with that.

Another thing is just when it comes to Zoom meetings, especially with a lot of people, there's always that awkwardness of how do you introduce everyone because everyone's order of people is different? So, there's lots of ways to do it. One way that I find is helpful is whoever is the facilitator, usually the case manager, they just kind of call out like, "this is our regular ed indication teacher," they introduce



themselves. “Our LEA today is our process coordinator...” So, we just have that person guide the order. And that way it makes it more smooth as opposed to everyone trying to talk over each other, like, “who should go next?” That creates awkwardness. So, that's one way to help.

Another thing that's helpful is just making sure your full name is accurately showing on the screen. So, my name is Emily Surapaneni, and so sometimes maybe it would just say Emily. Or Emily S. But a parent may not know who that is. So, I think it is helpful to see the full name so that I can actually know, “oh, that's who that person is on my notice of meeting.” So just kind of keep that in mind.

And then my final thing, as a district, we've kind of had to think about what can we do electronically when it comes to like signatures, when it comes to permissions? So, what we have done for our record of participants, which is like our sign in, we've always previously had everyone sign in with a signature. We now have that form and the case managers just type in it and we upload it and attach it.

When it comes to our prior written notices, our notices of action, an action to promote a change to the IEP, we allow (as long as it is not the initial IEP or an evaluation or reevaluation), we do allow the parent to either give written or verbal permission for us to proceed with the change. So that's really easy over Zoom. We can show it to them and ask “do we have your verbal permission?” “Yes,” and just document it.

They can also do that through email.

For our releases of information, which is another big one, our district is working on creating an electronic version with that. It's still kind of in the mix, but we plan to do that for those.

Okay. So, I'm going to pass it to my friend Kevin, and he's going to continue on these great tips and tricks for you.

[Slide 16 – Tips from the Field: Navigating Virtual IEPs]: Kevin Rubenstein: There we go!

So as I get started, just a little bit about where my journey is at with our school district. So, we actually are bringing in our last group of students this week. We started with our eighth graders, our juniors, and our seniors, capping off a journey that has lasted a little over a month now. We have equated it to a slow roll out of our plans. So, we started back on September -- actually, we started fully remote on August 24th for everybody, and then we started bringing back our students with the most significant disabilities on September 2nd. So, of our 8800 students in the district, we were probably bringing back in around 100-150 at that point on September 2nd, and we've slowly built from there.

We have of course experienced some bumps and bruises. The typical things that you would experience with COVID, I would imagine, including COVID cases and exposures and those sorts of things. And we are learning to navigate that. So, it is a part of being a new assistant superintendent in the district.

If you could move to the next slide, that would be helpful. We'll go on with our tips and tricks here.



[Slide 17 – What Do You Recommend?: Facilitated IEP Process]: Kevin Rubenstein: So what do I recommend? I would say that one of the best things that I have ever done, and it's actually a best practice related to IEPs out there, is using the facilitated IEP process. There are several companies and organizations that do training related to facilitated IEPs and using their process. But what I have found most often is that the facilitated IEP process helps to keep teams focused on what's important, which is the student. And you make sure that you have clear roles for every single group member. So, like Emily was saying before, you want to appoint somebody who is going to be a note taker and somebody who is going to watch the chat.

You're also going to want to make sure you have somebody who is going to watch the body language of people who are listening in and just participating in the meeting so that you can, just like you typically would in a regular IEP meeting, so that you are actually able to make sure that this is really going well or that you can actually sort of, quote, read the room, and make sure that you do that well.

The facilitated IEP process actually comes with a set of norms, and you can adjust those norms. But you get agreement on the norms at the beginning of the meeting, and I think that in today's age of COVID, as you are doing lots of Zoom meetings, that sometimes people just lose their manners a little bit. So, setting norms for the meeting about are we going to have our cameras on or off? Are we going to all mute ourselves? Are we going to, like, what's going to be the process if we all get booted and lose the technology? Those sorts of things. Those become some of the added norms that we use for the meeting.

So, like I said, those are not parts of the typical process for the norms. So, you may need to alter the process slightly to fit this format. But certainly, you're going to do that and use this facilitated IEP process to your advantage there.

You want to know when to share your screen. There's a part of the facilitated IEP process where the entire team sort of plots out a student's strengths and what's working for the student. And then plots out the areas for growth and what needs to be developed for that student. And so you're going to want to walk through when exactly you're going to be sharing your screen, what you're going to be sharing on your screen, is it going to be a Google Doc, is it just going to be, like Emily said, your IEP system, is that going to be confusing to people? Think that through ahead of time. And practice really makes perfect. So, you're going to want to make sure that, for instance, on this GoToWebinar platform, when I move to my left, I'm actually moving to the right on the screen here. And so you're going to want to make sure that you sort of think that through for those of you who are new to platforms. You want to think through exactly what that looks like and think through exactly how things are going to look on the screen. Do it from a participant's perspective, say things out loud, read things out loud, know how it's going to come across.

The other thing that I think that the facilitated IEP process does is that Emily talked about sending paperwork home in advance. So, in Illinois that's actually a law. So, we are required by law to send



home paperwork in advance, 3 days in advance of the meeting. And while a lot of teams started to struggle with that and were sort of caught off guard by it, people who were already using the facilitated IEP process were not because that is a good practice to have already. So, we were sending home the paperwork in advance. And this year, in my current district -- we had this in my last district -- we're adding the process of making sure that you check in with a parent with a phone call, to sort of clear the decks and make sure that the parent knows how to log in to the meeting, make sure that things are going well.

Our rule in my last district, and I'm trying to instill it in my new district here, is that if you can sense with the family that there is just something that is not right or that there's going to be a lot of conflict, we don't want to have a lot of conflict at an IEP meeting. So if we can sort of clear the decks ahead of time or if we need to delay an IEP meeting so that we can have some side meetings or some side conversations with the family to do some problem solving, then let's do that. Really checking in with families early and often as a part of this process, because families often think that things are sort of out there, and especially when if their student is virtual, they are thinking that maybe they are not seeing their case manager or if they are only in person, so our students are in person right now two days a week, so they feel like maybe they're getting less instruction. So we have to sort of pick up the slack a little bit.

[Slide 18 – What Do You Recommend? Be Intentional About Everything]: Kevin Rubenstein: So, if we want to move on to the next slide, in terms of what I would talk about here is to just be intentional about everything. So, think through exactly what those introductions look like. So, just as Emily was talking about, making sure that everybody knows to give an introduction. So, if I change my name in the chat box here to just K Rubenstein, is my name Krubenstein? Who am I and why am I in the meeting?

And we want to make sure the parent is welcomed. Just like an IEP meeting, that somebody is there who knows them and welcomes them into the room. And now in the era of COVID, gives them an elbow bump and lets them know that they're here. So, we want to say, "I'll start out the introductions here." "I'm going to pass it to the parents who are Mr. and Mrs. Wolfram...", and then you can pass it to whoever would you like to. So, you want to think through those introductions and maybe get that going just as a typical team norm that you have.

You're going to want to think about how are you going to get items signed? There are lots of companies of course that already had some DocuSigns and ways to sign items. In the spring, we did some documentation just in the IEP, there were some things that needed to be signed, so we did that virtually and sent it to the parents virtually. That takes time, but you're going to want to think through all of that in advance.

What happens if you need to take a break? Are you going to use the same meeting link? Do people close their windows? Do people turn off their cameras? What does that really look like?



All of us are becoming used to living in this space related to Zoom and Google Hangouts and GoToWebinar and that sort of thing. It may not be so typical for somebody else who is not so used to this. So, we need to make that really intentional.

I already talked about sort of when to share your screen. Again, think through that. Go through your IEP meeting agenda and think through exactly when you're going to share your screen, when you're not going to share your screen.

How is your language interpretation going to work? Is your language interpreter going to be there on the phone? Are they going to be there on the screen? Where is that going to take place? How is that going to happen? Do they have the call-in line? What does that really look like? Just be intentional about that.

And then do you have captioning available if needed. Zoom just added within the last week to a week and a half a really great captioning feature. Google and their captioning feature has already been a part of that. But you need to sort of activate some of these things, and you don't want to be scrambling in your meeting to turn it on and make sure everybody has it and that the parents can access it or that a team member can access it and have people staring at you while you are trying to run the meeting. So, do you have captioning available if needed, and how does that work? And, do you know what happens if the captioning doesn't work? And, do you have a backup?

So just be intentional about those things.

[Slide 19 – What Do You Recommend? Have Backup Plans for Everything]: Kevin Rubenstein: Next slide. Have a backup plan for everything. In a typical world, when a meeting runs over in person, your administrative assistant sitting out in the office is able to say, “wow, Dr. Rubenstein really likes to talk so this meeting must be running over.” And so the parents are just sitting out there chitchatting with your administrative assistant in the office.

Well, in the Zoom world, that is not always possible. So you need to think through what's going to happen if you have meetings back to back and one of your meetings runs over. Because the parents for that meeting that is supposed to be scheduled at 3:15 when your meeting is running over, may be thinking, “why is this person not letting me in?” “This school is always locking me out, it's causing really bad feelings,” and so you just want to, again, have a backup plan for that. So, who will go and check them in? Who will go and greet them there in the waiting room? Maybe it really is still your administrative assistant. Maybe that's another job that we have. When we were doing interviews over the summer, we still had our administrative assistant in HR greet our candidates in the waiting room while the rest of us were in another interview.

One of the things that happens of course is that Zoom goes down. Things like that happen. So, what happens if Zoom goes down? Or your power goes out? Or the internet goes out? Or something along those lines?



I have had the unfortunate experience right here in this office of having a literal tornado go right around the corner while we were negotiating with our teachers' union on Zoom about COVID. So, like what happens if Zoom goes down? And what happens if you're right up against the deadline? Think through all of those things and have a backup plan. Is there another platform that you could use? Is there a Google Hangout link that you always use? Always have a backup plan.

What happens if your parents can't access the platform? Sometimes your Zoom platforms are set up so only people in your school district can access it. Sometimes things happen so that only people from a certain area code can access a number or what have you. So what happens if the parents can't access your platform? What will you do then and how will you get them in? Or, can you patch them through somehow? So just think through that.

A lot of times in really tough IEP meetings, I really will sort of call a timeout and say, "let's just take 5 minutes and we're going to go and just talk with each other." And so I will use that as a strategy to break some tension. So, do you need breakout rooms? Is this a high pressure, high stress IEP meeting? And if so, do you have the capacity to break people into breakout rooms at a moment's notice and just make sure that you've got that going on there?

And what if the team is the only one on screen and the parents are participating on the phone? What does that really look like? Will you be making funny faces at each other? Like what does that really look like? Think that through and have a backup plan.

[What Do You Recommend? Use This to Support the Process]: Kevin Rubenstein: So next slide there. I think that I've got one more slide. So just use this to support the process. Think about how you can use the private chats to support a coaching conversation. So, I have a couple of new assistant principals working in my district. How could we support them by participating in a meeting and maybe giving them some feedback? Engaging with a quiet team member to say, hey, what are your thoughts here? I need you to speak up. Check in with others about the process. I use that at the beginning of the year to say to a principal, is your building ready to bring this student in tomorrow, when the parent was begging for that.

How could you use technology to ensure that all team members are heard or support the process of gathering feedback from the families? So, think through like maybe we have a shared Google Doc together. All of the strengths and areas for growth, where we typically are charting and doing that in front of the room. Maybe this is a collaborative process where everybody is just typing in a Google Doc. Maybe that's what that looks like here as a part of your IEP meeting now doing it this way. So just think through how we could really use this process. I think that there are some really distinct advantages that all of this technology could actually bring to parents and families and to us that are really pretty exciting.

So just think through that, because we never know. Somebody asked a question in advance like what happens if you have an attorney at your meeting and how does that work? So, I think one of your



norms could be that you as the facilitator will mute everybody, and if you would like to be called upon, then you need to raise your hand. And what a dream world that you as the facilitator get to unmute everybody. Right? Like, I would love to do that in IEP meetings in real life! So those are the sorts of things that we just, you know, if that's a norm that the team adopts, that's a possibility to sort of -- you're in a new space here. So how do we use this to support your process here? Just think through those things in advance.

So, with that, I think that we are going to take some questions.

[Slide 20 – Questions]: Tessie Bailey: Yes. So, I want to thank you, Emily and Kevin, for sharing your tips about successful virtual meetings. And it seems like a lot of those things could also transfer to your face-to-face IEP meetings.

One thing I sort of gathered is it does take some planning to really facilitate this. You can't really wing it. You have to have your norms in place and the sort of preplanning work to make sure folks have their materials to participate.

I do want to share a couple of participants actually were sharing their own strategies. I know Patricia shared making sure any documents you send home have the watermark for draft so that folks know it's not the final, but you're just giving them something tangible to hold.

And this idea of checking for understanding or stopping to see if folks are with you. I know we've found in Zoom meetings that people have to watch themselves as they talk. So, having some of those formal stops. Check to see if we're okay before we continue to move on.

And finally, and this builds on what Emily shared, is when you're putting your name, maybe also put your role. Your parent may not know that you're the school psychologist or occupational therapist, so parents understand who is at the meeting.

We did get a lot of questions actually about parent signatures. Both of you addressed this, but we want to be clear from the PROGRESS Center that IDEA does not require a parent to sign an IEP in order for it to be implemented. So, you want to be sure you're checking with your state about what are the requirements and what's the guidance coming from your state, because as you heard today, each state has different requirements.

Now, we did have some questions. And Kevin, I'm going to give this first one to you because of your current role. Have you applied these same tips and recommendations to 504 meetings?

Kevin Rubenstein: Sure. I don't get to be in a lot of 504 meetings these days, but they very easily could be applied. I think that good meeting practices and good parent collaboration practices are good across the board. And it really has to do with building relationships with parents and families, and that starts with -- I was actually talking about this with our team yesterday. That really starts with making sure that the annual review or the meeting itself is not the only time that we're having a conversation with



the family about that student. If it is, then everything is going to be riding on that meeting. And so if we can sort of spread our communication out to maybe once a month with that family about what's going on with those students and checking in with that family once a month, even if it's just an email, opening up the door to sort of say, "hey, I saw Kevin in class today, he looked really attentive, I just wanted to check in with you about how that accommodation that we put into place at the last 504 meeting was going from your perspective? Could you just send me some information?"

It's going to open a door. Or we can schedule a phone call. It's going to open a door, because the more of those little events that with we can string together, the better off we'll be in the long run. But it's really about building those parent relationships that are going to help us to have a better process.

Tessie Bailey: Excellent.

So, Emily, I'm wondering if you could share just some of your tips for when your Zoom does go out. Do you have a strategy that you use in your district?

Emily Surapaneni: That's a good question. I personally have not had that happen. Kevin maybe is the one who has. I don't know. The tornado down the street was kind of crazy.

But I would say whether you have to reschedule that meeting, I mean, your timelines are always there. So that's why you have to give yourself plenty of time. But whether you're rescheduling or just trying to get everyone on a speaker phone if that's possible. You know, trying to get the parent and seeing what they prefer. Some parents are going to say, no, I want to see it, I want to do this again. So, it's really whatever their preference is and whatever feels comfortable for them I think.

Kevin Rubenstein: Yeah.

Tessie Bailey: And then what are you all doing about cameras during your meetings? Are you requiring those? Or are you leaving it optional?

Emily Surapaneni: We are leaving it optional. We are not requiring it.

I do think for families to see us at least is helpful so that they can see our faces and who we are is nice. But we do not have like a mandatory expectation that it has to be done.

Kevin Rubenstein: Yes. Required for staff. Optional for families, obviously.

One of the things I forgot to point out is that while we are in person, the state board has really still strongly encouraged all meetings to be virtual if at all possible.

Emily Surapaneni: Same with us. We will continue to maintain I think virtual meetings even if our kids are coming back.

Kevin Rubenstein: Yep.



Tessie Bailey: So how are you all addressing student privacy or FERPA within your virtual IEP meetings?

Kevin Rubenstein: So, it is interesting. That's like a whole new realm for all of us, I think. First of all, the

Tessie Bailey: And I'll just interrupt you for a second. I did put the link from the U.S. Department of Ed around FERPA in virtual experiences in the chat box.

Kevin Rubenstein: Yeah. So the U.S. Department of Ed and the student privacy office has restrictions, but they have issued guidance around this in the spring and really just sort of said that we need to make sure that we're observing the rules and doing the best we can, but that they understand that there's going to be some challenges with that. So I think that when your tech team, when they're investigating a platform like Zoom, like Google Hangouts, like those sorts of things, that they're the ones that you're going to need to work with to make sure that your platform is FERPA compliant, that it is fairly encoded and all of those other sorts of things. So that you're able to move forward from there.

Tessie Bailey: Well, I wanted to see if there's any last-minute things that you all want to share before we formally close up.

Kevin Rubenstein: Emily?

Emily Surapaneni: Overall, it's actually gone better than I -- you know, back in March when this was like going to be a reality, you know, it's been okay. I actually think having to share your screen, especially for when you have those bigger IEP meetings, it kind of forces everyone to look at the same thing. I've loved it when creating like behavior intervention plans for families, because normally I think you just are kind of talking about it and referencing a document, but like when everybody has to see it and you're kind of walking through, I really do think it's pretty powerful. Like it forces everyone to see the same thing, and I think that's really good.

Kevin Rubenstein: Yeah.

So, I also think that it is really helpful because parents are participating in their home turf. You're participating in your home turf. I can participate from my office, which is comfortable to me. I don't have to go anywhere, move my stuff. You know, I can be wherever I need to be in order to have an IEP meeting. And it's the same thing for the families. So, I think that that is really comforting.

Emily Surapaneni: Agreed.

[Slide 21 – PROGRESS Website]: Tessie Bailey: Well, I would like to personally thank both of you for sharing your experiences and tips and tricks today for conducting virtual IEP meetings.



If you all want to learn more about conducting virtual IEP meetings, we have Emily's tip sheet that she shared, and we have a bunch of other resources available on the PROGRESS Center website at promotingprogress.org.

[Slide 22 – Making it Your Own]: Tessie Bailey: I also want to remind you that the virtual IEP resources can be adapted for your local context. So you may decide that based on needs, you want to have more time for a particular agenda item or you want to modify the meeting roles or the names of your meeting to align with your system, but you can also create new supplemental documents. If you look at the document on the right-hand side, this is an example of where a team created a notetaking resource that aligned with the agenda that the parent could type her notes or write her notes in preparation, that they were coming prepared for what they wanted to talk about in each of those items.

One of the parents said it helped her make sure her voice was heard in that meeting.

[Slide 23 – IEP Tip Sheets]: Tessie Bailey: Also, on the website, we just released yesterday IEP tip sheets to help you in the development of the actual IEP during your IEP meeting. And keep you focused on what matters most in promoting progress for kids with disabilities.

[Slide 24 – Alexa Home Learning Skill]: Tessie Bailey: And I want to share one last resource. This is something new that's coming out of two of our centers. This is a great resource for supporting families and working with their kids at home. It is a supplemental resource. It aligns with our partner in the CEEDAR Center, and it's helping with an at-home learning. So those of you working in virtual learning platforms, partnering with parents, this is something you might bring up at the IEP meeting to help build their capacity to really help implement these supports across the school and the home environment.

So, it was developed by Richard Carter at the University of Wyoming, and the way you access it is you say, "Alexa, open home learning." And it will walk you through.

[Slide 25 – Stay Connected with PROGRESS]: Tessie Bailey: And finally, we are all learning together. The best way to maximize virtual IEPs, I think it's a new learning process each time. If you have tips, tricks, keep them coming. Tag us on Twitter or Facebook, and then we'll share your tips and tricks and add them to our resources.

If you want to stay up-to-date, we also have a regular newsletter. We will be releasing new resources over the next couple of months to help you on your journey in both virtual and face-to-face supports for students with disabilities.

And I would like to thank our wonderful presenters for sharing their wisdom and our audience for sharing your thought provoking questions.



I want to remind you that please complete our survey about the webinar so that we can better meet your needs in the future. So please have a wonderful day, and thank you, Emily and Kevin.

Kevin Rubenstein: Thanks for having us.

Emily Surapaneni: Happy to be here.



1000 Thomas Jefferson Street NW | Washington, DC 20007-3835
202-403-5000 | www.air.org

www.promotingprogress.org



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