

Creating Individual Education Plans and Instructional Aids

Module
5



A manual for teacher trainers

Prepared for:
Ministry of Education, Zambia
Norwegian Association of Disabled

Developed by:
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Module 5: Creating Individual Education Plans and Instructional Aids

A teacher training resource for teacher trainers

Version 1

This teacher training resource was developed originally as a collaboration between Norwegian Association of Disabled (NAD) and Enabling Education Network (EENET) for the Ministry of Education in Zambia and Ministry of Education and Vocational Training in Zanzibar.



NAD - The Norwegian
Association of Disabled



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Ministry of Education



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Association of Disabled



Inclusive Learning
Approach



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Introduction

The overall aim of this module is to support participants' understanding of what an individual education plan (IEP) is, its characteristics, and the reasons why schools develop and use IEPs. Participants will look at some of the benefits of IEPs and discuss which learners can benefit from having an IEP. The module also provides details about the IEP development process and looks at important factors to consider when developing an effective IEP (such as collaboration and parent/caregiver and learner participation). The module offers practical suggestions for planning and facilitating IEP meetings.

Section 5.7 of this module also focuses on instructional aids, helping participants to develop teaching and learning aids from locally available resources. This supports schools to implement strategies and devise interventions that enable learners with additional needs to progress. Where there is an absence of ready-made teaching and learning aids, teachers need to be creative, innovative, and resourceful. They need to improvise.

It is assumed that participants will have already taken part in inclusive education training and have a clear understanding of: the theory and concepts of inclusive education (see **Module 1**); the roles of the school inclusion team (SIT) and the school inclusive education coordinator (IECo) (see **Module 2**); how to locate out-of-school learners and support education transitions (see **Module 3**); and how to screen learners and identify and assess their learning needs (see **Module 4**). If participants have not received this previous training, for example, if they are not aware of the twin-track approach or of effective approaches for assessing learning needs, then they may not be ready to join in this training module. Note that the Supplementary Module on **Including Learners with Additional Needs** contains further information about different additional needs. This includes advice and guidance on identifying additional needs, how additional needs can exclude learners, and practical tips and ideas for teachers on supporting learners with additional needs in the school and classroom environment. This supplementary material can support the development of IEPs and relating to specific impairments may be useful when thinking about developing different teaching and learning aids.

As with the other modules, the training outlined here focuses on using participatory methods and active learning techniques. It follows this basic principle:

We must use inclusive training methods if we are to successfully train others how to teach inclusively.

Preparation for the training

Prior to the training workshop, the trainer should ask participants to collect any waste materials and locally available resources they think will be useful for the practical activities, which will be shared at the training. For example:

- bottle tops;
- milk or food cartons / boxes;
- old newspapers or magazines;
- advertisement leaflets from your local shops;
- drinking straws;
- sandpaper;
- old pieces of string;
- tubes from toilet rolls;
- any old clean food containers like yoghurt pots;
- pasta (uncooked);
- beans (uncooked);
- rice (uncooked);
- seeds;
- small sticks and stones from outside;
- leaves of different shapes and sizes;
- old calendars, posters, or leaflets from organisations and/or businesses.

These are just some ideas. Participants will have many more if they are given enough time to collect items before the training.

Duration of training

Trainers should adapt this training to suit the local context and the time available to them for training. Trainers may decide not to use all of the activities, or to shorten some activities if time is limited, or to expand activities if participants need more support with understanding a particular topic. If all activities are used, without significant adaptation, shortening or lengthening, this module requires approximately 14-16 hours of training over 3 days, depending on the preferred length of training days, number, and length of breaks, and so on.

Session 5.1: What is an IEP and who is it for?

This session will help participants to reflect on what they already know or think they know about an individual education plan (IEP) and will give the trainer an indication of existing knowledge or misunderstandings. The session will enhance participants' understanding of what is meant by an IEP, why it is needed, and who can benefit from it.

Activity 5.1a: An IEP is what? And it is useful for what?

Main



35 minutes

Participants work in small groups. Each group is given a sheet of flipchart paper and asked to write the following statement at the top of it.

An Individual Education Plan (IEP) is _____ and it is useful for _____.

Each member in the group takes a turn to complete the statement, without discussing it. They are given one (1) minute each to write their statement on the sheet of flipchart paper. Give a signal when one minute has passed, and the participant who has been writing their answer passes the flipchart paper to the person on their right. The next participant must write their response, without repeating what has already been written, and when instructed by the trainer after one minute, passes the paper to the person on their right. This continues until everyone in the group has written a response, and/or until there are no more answers. The paper must be passed in the same direction each time.

Participants can then be given a few minutes to discuss their group's responses before sharing some of their thoughts in plenary to the whole group.

One group should be asked to present one idea, and then another group presents another idea, and so on. Groups can also feed in additional thoughts.

Write key points on a flip chart/board. Where participants disagree with each other's views of what an IEP is and why it is useful, or where they state clear misunderstandings, intervene to clarify and support.

Highlight that most learners achieve what is expected of them simply by the teacher using good teaching and learning strategies including differentiating activities for their mixed-ability classrooms. These teachers use a variety of teaching and assessment strategies and materials to teach learners who have different learning styles, different multiple intelligences, and experience different barriers to education.

However, those learners who need additional support, especially learners with additional needs, including those with special educational needs and/or disabilities, will benefit from an Individual Education Plan (IEP).

Give out **Resource 5.1** and participants can read it aloud together in their groups. Ask if there are any questions.

Resource 5.1

Individual education plans

Activity 5.1b: Additional information

Main



20 minutes

Hand out **Resource 5.2** and allocate a section of this additional information for each group to study, making sure all three sections are covered. Each group will then feedback the main points to the whole group.

Resource 5.2

Individual education plans – additional information

There are three sections:

Section 1 – What is an IEP?

Section 2 – Who needs an IEP?

Section 3 – Advantages of IEPs.

Rather than writing lists of answers, each group should record their thoughts in the form of a **mind-map** – a diagram that may have a single word or phrase in the centre, and then ideas, words and concepts associated with this word/phrase are added around it.

Remind participants about how they have devised **mind-maps** in previous workshops (for example, in Activity 2.1b in Module 2) – these are diagrams that may have a single word or phrase in the centre, and then ideas, words and concepts associated with this word/phrase are added around it.

Use one of the following feedback techniques to facilitate a plenary feedback and discussion and clarify any points of confusion that have arisen. These should be recorded on a flipchart:

- look at each section in turn and ask the group (s) who discussed that particular question to call out their main points;
- invite each group to give a presentation to share and explain their main points to the question they discussed;
- ask each group to display their mind maps around the room and then take the whole group around each display, asking the group whose display it is to explain their main points.

Session 5.2: Components of an IEP

This session will help participants to identify the key features or components of an IEP. IEP formats vary from country to country, and if a country does not have an IEP format standardised nationally, then IEPs may vary between districts, schools, and supporting partners. There should not necessarily be a nationally standardised IEP, as the plan supports individual learners and does not seek to measure them against each other. However, there are key areas of information that all IEPs should aim to cover.

Activity 5.2a: What makes up an IEP?

Main



30 minutes

Give each group a list of headings that might appear in an IEP.

The headings are:

- learner identification information;
- current level of performance in different areas;
- identification of priority needs and performance goals and indicators;
- identification of instructional and assessment strategies;
- implementation time frames;
- progress report;
- team members signing off section; and
- monitoring, evaluation and review.

Allocate one of the first four headings to each group, making sure all four headings are covered.

1. Learner identification information.
2. Current level of performance in different areas.
3. Identification of priority needs and performance goals and indicators.
4. Identification of instructional and assessment strategies.

Each group has five minutes to brainstorm the types of information that might be gathered and recorded under their heading.

Each group then feeds back their suggestions for whole-group discussion. After 10 - 15 minutes give the groups **Resource 5.3** to read and compare with their ideas. They should read through the whole document and can also refer to **Resource 5.3** when doing the next activity.

Resource 5.3

Components of an IEP

Activity 5.2b: Evaluating IEP formats

Main



50 minutes

Participants should work in pairs. Give each pair **Resource 5.4a** and **Resource 5.4b** which provide examples of different IEP formats.

Resource 5.4a

An IEP sample

Resource 5.4b

Zambian IEP example

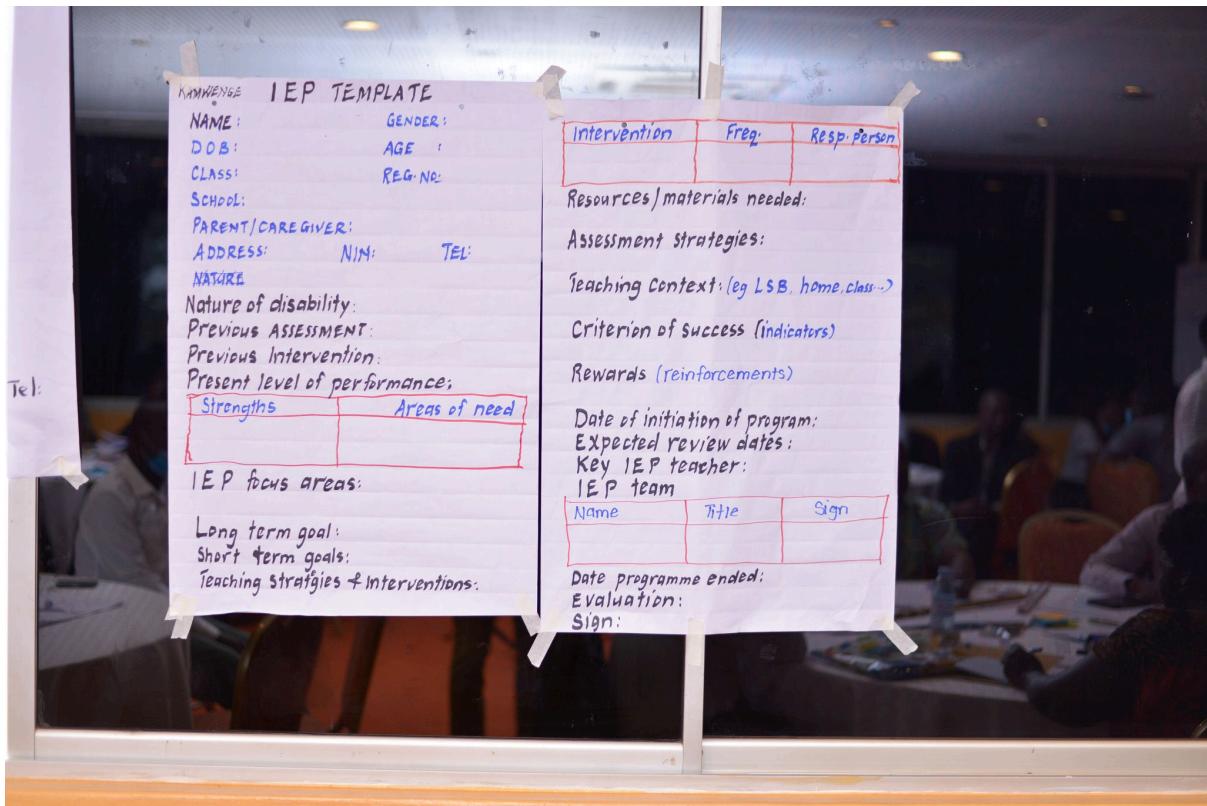
Participants should read and check if the IEP examples have all the important components that were discussed in **Activity 5.2a**. **Resource 5.4a** also contains a checklist as a reminder of the key components.

The pairs are guided to discuss:

- Is any important information missing?
- Are there any extra components needed?
- What are their overall opinions of the samples?

After 20 minutes, the pairs can then discuss their thoughts with others in their group.

Finally, facilitate a plenary discussion to share participants' opinions, and address any remaining misunderstandings.



IEP template created by one group in Uganda

[Image description: Two flipchart sheets stuck on the wall displaying the IEP template adapted by participants.]

Session 5.3: The IEP process

This session will help participants to understand what should be done in the different phases of the IEP development and implementation. It potentially involves a lot of presentation by the trainer and so activities are suggested to help make the session more interactive and reflective. The trainer may also wish to create additional activities (e.g., based on local case studies) and use energisers to break up presentation-focused activities.

Activity 5.3a: Putting the IEP process in order

Main



20 minutes

Ask participants to work in groups. Each group is given a set of cards cut out from [Resource 5.5](#).

Resource 5.5

IEP development process stages

Each group is given a sheet of flipchart paper. This is their 'mat' where they will arrange their cards, but they should not write or draw on the flipchart paper yet. On each card is written a stage of the IEP development process. The groups have to organise the cards on their 'mat' in the order that they think the stages happen.

Once all groups have completed their arrangement of the cards on their mat, observe how the different groups have arranged their cards. On their flipchart paper, participants may now draw lines/arrows between the cards to demonstrate how they think the IEP development process progresses. [Note: it is hoped that some groups may present this as a cycle rather than as a straight line, but do not guide them to do so. They will be able to adjust their thinking later.]

Present a broad overview of the phases involved in developing an IEP. At this stage this should just mention the different phases, as details of each phase will be discussed in the next session.

Resource 5.6

The cyclical nature of the IEP development process

Highlight – using the diagram in **Resource 5.6** – that the process is cyclical in nature, not linear. That is, the process may happen more than once with a learner, to keep checking and ensuring her/his learning needs are being addressed. After reviewing the cyclical stages below, participants can revise the way they have arranged their cards on the flipchart paper from Activity 5.3a, gluing the cards in place and demonstrating the cyclical nature of the IEP process with arrows. These can be displayed in the training space.

The stages are:

1. gathering information about the learner;
2. developing a statement on the learner's level of performance, including strengths and needs;
3. identifying the learner's priority learning needs;
4. setting annual objectives and performance goals for the learner;
5. identifying strategies for supporting the learner towards these goals;
6. implementing the plan;
7. reviewing and revising the plan.

Activity 5.3b: Starting the IEP development process

Main



15 minutes

Referring to **Resource 5.7**, and using any PowerPoint presentations provided, make a presentation explaining to participants how the IEP process usually starts. It is important to make the presentation brief and pacey. Participants are being given a great deal of information throughout this module, so short PowerPoint bullet points summarising **Resource 5.7** will be useful.

Invite questions and respond to any uncertainty around the division of IEP roles and responsibilities between the teacher and any specialist staff (especially if teachers feel unsure about taking on the responsibility, or if any specialist staff feel worried that empowering teachers in the IEP process means that they [the specialists] will lose power).

Resource 5.7

Starting the IEP development process

Give out **Resource 5.7** for participants to store and refer to later.

Activity 5.3c: Stage 1 – Gathering information about the learner

Main



20 minutes

Start this activity by presenting the information from Box 1 in **Resource 5.8** (this resource will be handed out to participants after undertaking the activity).

Participants are then asked to work in small groups. Each group has a sheet of flipchart paper divided into 2 columns:

Sources of information about the learner	Methods we can use to obtain information from these sources
--	---

The groups need to brainstorm the potential sources of information about the learner, and then work out any particular methods that could be used to collect this information. Give an example, for instance:

Source of information = parent/caregiver. Method = informal interview.

Source of information = learner's class work. Method = classroom observation, review learner's portfolio of work.

After 10 minutes, ask groups to feed back in plenary and develop a joint list of potential sources of information, and methods for gathering information from these sources. Also refer to the information in Box 2 of **Resource 5.8** to check that nothing vital has been missed, and to present anything that has not yet been mentioned.

Give out a copy of **Resource 5.8** to each participant.

Resource 5.8

Stage 1 – Gathering information about the learner

Key areas to cover in this brainstorm and discussion include:

- reviewing the learner's available records;
- consulting with parents/caregivers, the learner, school staff, and other professionals;
- gathering information through observing the learner;
- conducting additional assessments, if necessary; and
- summarising and recording information in a useable format.

Activity 5.3d: Stage 2 – Preparing a statement on the learner's level of current performance

Main



15 minutes

Highlight that once the information has been gathered about the learner, the IEP team (likely to be the learner, teacher, parents/caregivers and other relevant professionals – see [Resource 5.15](#) for more information) should discuss, agree upon, and summarise it so as to create, revise or update the learner's profile. They then need to determine the learner's current level of performance in the different learning areas. Both strengths and challenges should be identified and recorded. A description of all this information should be short and to the point.

Resource 5.9

Stage 2 – Form for documenting a learner's profile and performance

[Resource 5.9](#) may be useful for presenting the information about the learner and making a statement about her/his performance levels. Give out [Resource 5.9](#) and ask participants to review the form for a few minutes and then join a discussion and/or answer questions relating to it.

Activity 5.3e: Stage 3 – Identifying the learner's priority learning needs

Main



15 minutes

Say the following:

Once the IEP team has documented the learner's profile and performance, this information can be used to identify and prioritise the areas where the learner needs support most urgently. These priority areas should be grouped into different functional areas.

Remember from Module 4 that the different functional areas are Communication, Movement, Hearing, Seeing, Thinking, Emotional, Behaviour/Social, and Attention. It is important to prioritise. What would help the learner the most?

An example that the trainer can use:

- **Learner:** Thomas
- **Functional area:** Communication
- **Current achievement/functioning:** Thomas struggles to take appropriate turns in conversation with his peers. He frequently talks over them and interrupts them rather than listening to them during group conversations.

A priority learning need for Thomas is to learn skills for engaging in conversations and listening to and responding to what other people say.

For additional examples, invite participants to share examples of learners they focused on in the Module 4 Action research tasks. Discuss what participants have observed about the current achievement/functioning of each learner and what might be a priority learning need.

Activity 5.3f: Stage 4 – Setting annual learning goals and short-term objectives

Main



40 minutes

Resource 5.10, together with any PowerPoint presentation provided, provides the trainer with information for a 10-minute presentation. Start by presenting the information in Box 1.

Resource 5.10

Stage 4 – Setting annual learning goals and short-term objectives

Using Box 2 from **Resource 5.10**, and any PowerPoint presentation provided, present information about the importance of breaking longer-term learning outcomes into smaller, more achievable, shorter-term performance goals.

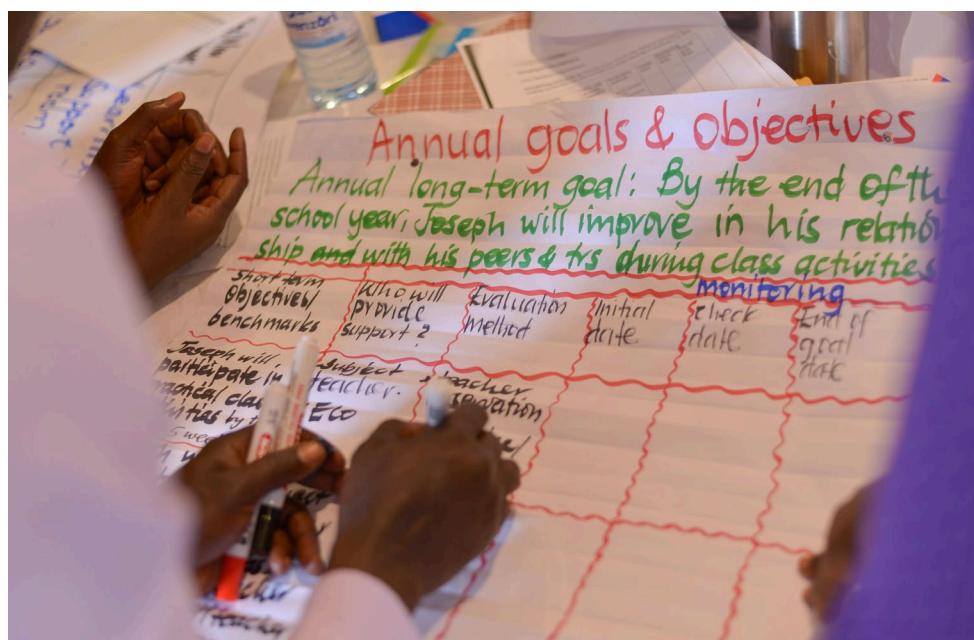
Ask participants for any questions and then give out **Resource 5.10**. After checking that participants understand the process and details, **Resource 5.11** (Page 1) can be used for the next activity.

Resource 5.11 contains a list of learning outcomes that have been set for learners in their IEPs. Note that these outcomes are too vague.

Resource 5.11

Stage 4 – Creating SMART goals

Give out page 1 of **Resource 5.11**. Working in pairs, participants suggest how to turn these broad outcomes into SMART annual goals and short-term objectives instead. Either check participants' understanding by walking around the room and checking their answers, or facilitate a plenary feedback session.



Participants create an annual long-term goal with short term objectives in Uganda

[Image description: a flipchart sheet on which is written an annual long-term goal at the top of the sheet. Underneath, short term objectives have been created, along with noting who will provide the support, and evaluation method.]

NOTE: Page 2 of **Resource 5.11** gives trainers some answer ideas for how these vague goals can be turned into SMART annual learning goals and short-term objectives.

NOTE: Trainers collect the SMART goals that groups create. These will be used later on for **Activity 5.7d**.

Activity 5.3g: Stage 5 – Identifying and selecting teaching and assessment strategies and learning materials

Main



30 minutes

Convey the following information on the stages involved in the development of the IEP process:

- identifying teaching strategies that will be used to assist the learner to achieve the learning objectives;
- identifying and selecting materials and other assistive devices that will be used to support learning;
- identifying assessment strategies that will be used to assess the learner's progress;
- determining the timeframe for reviewing the learner's progress and the reporting procedures; and
- allocating responsibilities to the various people involved.

Emphasise that the training cannot inform participants exactly which teaching and assessment strategies they will need to use for which situation, as every learner's situation and needs are unique. However, a major part of deciding on the strategies will depend on collaboration between the teacher and other people involved in the IEP development (other teachers, specialist staff, parents/caregivers, etc). One teacher on her/his own cannot be expected to have all the answers to every teaching challenge. Equally, an external expert cannot tell a teacher everything they need to do, because the expert is not in the class with the learner every day. Therefore, strategies are best developed as a combined effort, bringing expertise and suggestions from all angles.

Now give **Resource 5.12** to participants.

Resource 5.12

Stage 5 – An example of documenting performance goals, teaching strategies and learning materials

Resource 5.12 shows how learning goals and strategies for achieving these goals can be documented. The assessment strategy section at the bottom of this table is blank.

Ask participants to work in small groups to discuss what might be appropriate assessment strategies for each particular case. Facilitate a brief plenary feedback to share ideas.

Activity 5.3h: Stage 6 – Implementing the IEP. Stage 7 – reviewing, evaluating, and revising the IEP

Main



20 minutes

Hand out **Resource 5.13**, and ask participants to read it individually. They can be encouraged to initially discuss any questions or comments they have on the Resource in pairs.

After 5-10 minutes, encourage any questions to be shared with the whole group.

Resource 5.13

Stage 6 – Implementing, reviewing, evaluating. Stage 7 – Revising the IEP

Session 5.4: Developing an IEP

This session gives participants an opportunity to apply some of the training so far. It gives the trainer a chance to observe if participants have understood the input and are able to put into practice.

Activity 5.4a: Case study analysis

Main



50 minutes

Give each group of participants a copy of the case study to read – [Resource 5.14](#).

Resource 5.14

[Case study for IEP development](#)

Review this case study with the participants and, if necessary, model creating an IEP using the IEP development resources that have been shared. Together, develop a draft IEP for the learner.

NOTE: This is a story of a particular learner. Using what they have learned so far, and using the various handouts, forms, etc. so far received, the task is to create an IEP for this learner – or at least to fill in as much information as they can, based on what they know. Remember to also use the twin-track approach to learning; identifying system challenges as well as individual learner's needs.

Stress that, of course, unless they speak to everyone else involved (learner, parents/caregivers, teachers and non-teaching staff, specialists, etc) they cannot be sure they have **all** the necessary information, and their IEP will therefore be just a draft set of ideas.

Activity 5.4b: Participant-created case studies

Main



60 minutes

To make this activity relate more directly to the participants' own experiences, ask the groups to create their own case study on which to base the IEP. This can be facilitated as follows:

- In small groups the participants take it in turns to tell the story of a learner who is having challenges achieving learning goals and objectives, despite being helped with flexible and creative teaching methods.
- Within the group they then discuss and negotiate which one story to use as the basis for developing an IEP. They should probably choose the story about which there is the most background information.
- They then write down the key elements of the case, if possible, using the various forms already shared for recording the learner's profile and performance.

Once the details are documented, the group can begin creating an IEP for the learner, **although they will note that this remains only draft ideas, as the full range of stakeholders have not been consulted.**

NAME :	THANDIWE MALUMBE	
GENDER :	F	
D O B :	15/06/2001	
SCHOOL :	SHUNGU COMB. SCH.	
SRN :	1082/SH/ZM	
GRADE :	11	
P/G NAME :	MALUMBE, O.	
ADDRESS :	HOUSE 18 CHAMBA STREET MALOTA COMB.	
Phone #:	0975 8235 27.	
<u>SUMMARY OF ASSESSMENT DATA</u>		
Information	Date	Summary of Results
EDUCATION	20.11.2017	-Reading (Gr 6) - Maths (Gr 11) -Natural Science (Gr 5)
PSYCHOLOGICAL	13.11.2017	-Above average intellectual functioning -Behaviour difficulties -Indication of Autistic behaviour
Speech and Language	17.11.2017	-Some language difficulties and poor use of language in social situations
<u>Summary of Student Strength and needs</u>		
Areas of Strength	Areas of need	
- Mathematics	- learn to work on her own	
- Spelling	- Work on listening skills - To understand what she reads	
- Enjoys Reading	- Work on her temperament	

Example of an IEP flipchart sheet prepared by participants, based on Thandiwe's case study

[Image description: A flipchart sheet of paper on which is written details of Thandiwe, her assessment data, strengths and areas of need.]

After the case study analysis and IEP drafting has been completed, each group present their case study and draft IEP. Facilitate a plenary feedback session. Highlight key features of the IEPs, invite other groups to comment, and clarify any misunderstandings.

Following the IEP presentations, make sure that the participants understand how they are used in the school. Reiterate the following:

- An IEP needs to be feasible in the specific context. It does no good to put brilliant ideas on paper that are impractical or simply not feasible in the given context. (Remember to be SMART.)
- Also, once the IEP has been created it needs to be implemented – the nature of the implementation will depend on each unique plan.
- The learner's progress towards achieving the plan's goals is also monitored. The IEP can and should be reviewed and revised depending on the learner's progress.
- Sufficient time should be given to see if a particular strategy is helping the learner (i.e., don't revise the plan and change direction before there has been a fair chance to see if it is helping the learner).
- But equally, the plan should not stay unchanged for a long time if it is clearly not helping.

Session 5.5: Collaboration

The aim of this session is to introduce and discuss the concept of collaboration and highlight its importance for the effective development and implementation of an IEP. The session also should help participants enhance their understanding of some of the important principles that should guide collaborating team members.

Activity 5.5a: Understanding collaboration – who collaborates and what does it mean?

Main



25 minutes

Who collaborates?

Remind participants of the different role players in the IEP development and implementation process, as discussed previously.

In groups, participants brainstorm/discuss the following questions:

- Who are the main participants in the IEP development process?
- What roles do or could they have in this process?
- Why is it important for them to be included?

Supplement this brainstorm or discussion with information from [Resource 5.15](#). Highlight that it is important for these team members (the IEP team) to work collaboratively for the effective development and implementation of an IEP.

Resource 5.15

IEP team members

What is collaboration?

In pairs, participants discuss what they think collaboration means, in the context of education and developing an IEP. They write down some ideas. Then give out [Resource 5.16](#), which contains some different meanings and ways of interpreting the idea of collaboration.

Resource 5.16

Collaboration

After participants have read this, ask the whole group to together create a definition of collaboration that they would follow (and ask others to follow) when supporting IEP development processes. Write down on flipchart paper and display this definition.

Activity 5.5b: Key principles for an effective collaboration process

Main



15 minutes

Ask participants to work on their own. They read Activity A in [Resource 5.17](#), and then answer the questions which follow. (The trainer may choose to use a different example here.)

Resource 5.17

Key principles for collaboration

When participants have completed this task, they should discuss and compare their answers with other group members. Then they can give feedback in plenary. Note down key points, and also provide other ideas for the key principles that contribute to a successful and effective collaboration process.

Note to the trainer: The list should include, but is not limited to:

- respect for diversity;
- trust;
- accessible and transparent process;
- responsibility; and
- accountability.

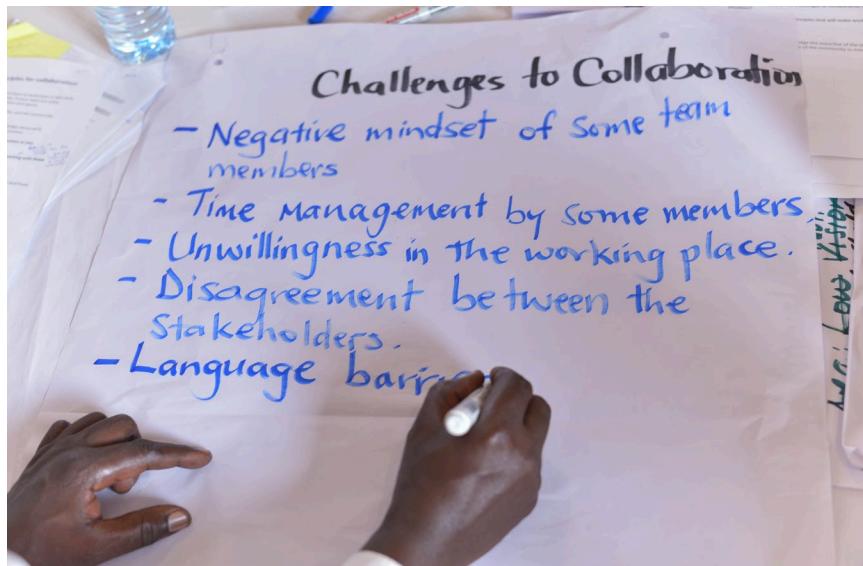
(4)

Key principles for an effective collaboration process

eg.	skillful hospitable focused objective openness	honest knowledgeable consultation coordination flexible
① <u>Trust</u>		
② Good listening	objective	consultation
	openness	coordination
	Transparency	flexible
	Team work / Cooperation	empathy
Tolerance		confidentiality
Respect	dialogical	impartiality
	determination	selflessness
Self-discipline		Mutual consent
Commitment		faithfulness
Time keeping.		hard-working
Effective communication.		reliable
Evaluation		sociable
Monitoring.		approachable
Shared responsibility.		accommodating

Example of a flipchart sheet containing a list of key principles for collaboration, created by participants

[Image description: Flipchart list of key principles for effective collaboration containing the words: trust, good listening, transparency, teamwork/collaboration, tolerance, respect, self-discipline, commitment, time-keeping, effective communication, evaluation, monitoring, shared responsibility, skilful, hospitable, focused, objective, openness, flexible, determination, honest, knowledgeable, consultation, coordination, empathy, confidentiality, impartiality, selflessness, mutual consent, faithfulness, hardworking, reliable, sociable, approachable, accommodating.]



Participants discuss challenges to collaboration in Uganda

[Image description: Flipchart list of challenges to collaboration being written by a hand, containing the phrases: negative mindset of some team members, time management by some members, unwillingness in the working place, disagreement between stakeholders, and language barriers.]

Activity 5.5c: Implementing these key principles in the IEP process

Main



20 minutes

Resource 5.17

Key principles for collaboration

Participants work in groups and read **Activity B** in **Resource 5.17**. They need to think about and discuss in more detail how each principle can be implemented during the IEP development and implementation process by IEP team members.

When the groups have finished, they should form 'super-groups' (i.e., two groups join together). Give them **Resource 5.18** and ask them to discuss how their ideas for implementing the collaboration principles compare (i.e., they compare the two groups' ideas and they compare these ideas with the ideas in **Resource 5.18**).

Resource 5.18

Key principles for effective collaboration

Session 5.6: IEP meetings

The aim of this session is to give participants some ideas on how to prepare and facilitate an effective IEP meeting. Participants will also be given an opportunity to consolidate what they have learned about collaboration and the IEP process.

Activity 5.6a: Overview of IEP meetings

Main



20 minutes

Resource 5.19

IEP meetings

First, highlight the importance of having an effective IEP meeting. **Resource 5.19** gives useful information that can be presented and discussed, covering:

- what an IEP meeting is and its purpose;
- preparing for an IEP meeting;
- parents/caregivers preparation for an effective IEP meeting;
- facilitating an IEP meeting;
- ending the meeting;
- after the meeting;
- encouraging parents'/caregivers' participation in IEP development and implementation; and
- facilitating learner participation in an IEP process.

Then give out **Resource 5.19** for participants to read, and also to refer to in greater detail during the next activity.

Activity 5.6b: Role-play an IEP meeting

Main



60 minutes

Divide participants into three groups. The groups will have different tasks:

- Group 1: Read the role-play script outline and then role-play an IEP meeting using Thandiwe's case study ([Resource 5.14](#)).
- Group 2: Check if the role players **used some of the principles that guide collaborative work**.
- Group 3: Check if role players **prepared and ran the meeting effectively**.

Group 1 instructions

Give the group the script ideas for the role-play ([Resource 5.20](#)).

Resource 5.20

Script outline for role-play

Allow them 10 minutes to read it, allocate roles and become familiar with the main tasks set for each character.

Instruct them to role-play an IEP meeting. They should use what they have learned so far about collaboration and organising meetings, unless the script outline instructs them to do something contrary to 'best practice'.

Group 2 instructions

While Group 1 is preparing, Group 2 should become familiar with their observation checklist ([Resource 5.21](#)) and discuss the kinds of things they will be looking for. Group 2 can also help the trainer set up the room for the role-play to be performed and watched.

Resource 5.21

Role-play observation checklists

Group 2 observes Group 1's role-play of the meeting proceedings. They use the checklist to check if role players are using some of the principles that guide collaborative work. They should not just tick but identify the principle and explain how it was used.

They should be ready to make suggestions for how the situation should be improved, such as focusing on the collaborative process, the meeting process and the learner and parent/caregiver participation, after the role-play.

Group 3 instructions

While Group 1 is preparing, Group 3 should become familiar with their observation checklist (**Resource 5.21**) and discuss the kinds of things they will be looking for.

Observe the meeting proceedings. Use the checklist to check if Group 1's role players are using the meeting guidelines as discussed during the presentation. They should not just tick but identify some of the guidelines and explain how they have been used.

They should make suggestions if and when necessary, such as focusing on the collaborative process, the meeting process and the learner and parent/caregiver participation.

Group 3 can also join Group 2 in helping the trainer set up the room for the role-play to be performed and watched.



A group discussing the role-play

[Image description: 3 women and 3 men are sitting around a table talking. There are lots of papers and booklets on the table. Another group is sitting around a table behind this group.]

Following the role-play, facilitate a plenary session, with a focus on the collaborative process, the meeting process and the learner and parent/caregiver participation.

NOTE: During their observations and feedback, Groups 2 and 3 should suggest improving parent/caregiver and learner participation. **If they don't make this**

suggestion, highlight it. If the groups do suggest this, build on this and present some activities that can be done to improve learner and parent/caregiver participation in IEP meetings.

Use some of the information from **Resources 5.22** and **5.23** for this presentation, and following the activity share the handouts with the participants for them to skim read and refer to in the next activity.

Resource 5.22

Encouraging learner participation in the IEP process

Resource 5.23

Improving parents'/caregivers' participation in the IEP process

Activity 5.6c: Encouraging learner and parent/caregiver participation

Main



60 minutes

Divide participants into no more than six groups.

Half of the groups discuss and come up with practical strategies for how they can improve Thandiwe's parents' participation in the IEP meeting. They can skim **Resource 5.23** for information that may be useful. The groups each then prepare a quick (no more than 4 minute) role-play to illustrate some of the ways the parents' participation can be encouraged.

The other groups read what is said about Thandiwe in **Resource 5.24** and come up with how they could use the 'feeling dice' game (explained on the second page of **Resource 5.22**) to address Thandiwe's screaming at the meeting. They should also prepare a short role-play to show this.

Resource 5.24

Thandiwe and the 'feeling dice' game

Following the role-plays, facilitate a plenary discussion and conclude the session, explaining that the rest of the training will be on developing teaching and learning aids that support the progress of learners to their learning goals.

Session 5.7: Developing teaching and learning aids from locally available resources

When identifying barriers to inclusive education, especially when trying to enable learners with additional needs to access the curriculum and progress, teachers and other educators often refer to a lack of resources. For example, they say they cannot be more inclusive and meet the needs of individual learners because they do not have appropriate or enough teaching and learning aids. However, the barrier is often a lack of flexible thinking and flexible teaching methods.

As with other modules, this module has encouraged participants to identify problems and work together to find solutions. The following activities will encourage participants to investigate reasons for using effective teaching and learning aids, how to develop and make them in context with their own educational setting, and how to adapt them to meet the needs of individual learners.

All teaching and learning aids used in the training activities are made from waste materials and cost nothing. Participants will be able to see that it is possible to have learner-centred lessons, using appropriate and interactive teaching and learning aids to enhance their lessons, even in challenging environments where schools have limited resources.

Participants will often experience a chronic lack of resources in their schools, often compounded by having to teach large class sizes. This often compels them to resort to using lecture methods where teaching aids may not always be used. The use of lecture methods means that learners remain largely passive. The following activities help participants to promote active learning in large, under-resourced, mixed-ability classes; enabling all learners to participate and improve their learning.

As encouraged in the introduction to this module above, ensure that participants have brought any waste materials and locally available resources that they have collected to use at the training.

To mark this session's shift in focus from IEPs to developing teaching and learning aids, it is recommended that an energising activity is introduced here, which allows participants to be placed, or place themselves, into new groups

so that they work with different people to those they have already worked with. This means that participants will be able to benefit from a wider range of experience and expertise. Earlier modules contain some examples of such energisers.

Activity 5.7a: Teaching and learning aids we know and use – a review

Main



30 minutes

Each group discusses some of the teaching aids they have used in the past or seen others use for teaching across the various subject areas for different learning competencies (for example, in subjects like Science, Mathematics, Social Studies, Religious Education, Physical Education, Thematic curriculum (P1-P3), etc.).

Ask each group to divide into pairs and for each pair to decide what subject/learning competence they wish to focus on. Groups should make sure each pair focuses on different subject areas or competencies.

Give out flipchart paper to each pair and each pair makes a table on flipchart paper with 3 columns:

SUBJECT & LEARNING COMPETENCE	TEACHING AND LEARNING AID USED	MADE FROM
-------------------------------	--------------------------------	-----------

They then record in the columns details of the teaching or training aids they have used in the past or seen others use. They should also indicate what each teaching and learning aid was made of. What materials were used to make it?

When feeding back, challenge the groups to try to come up with different types of teaching and learning aids and for a variety of different subject areas. If time allows, have each group share one from each pair's chart. Each group that follows should share something different from what has previously been said so that a variety of ideas and subjects/learning competences are shared. These flipcharts should be displayed in the workshop and referenced for additional ideas later one in the training.

Subjects and learning competence	T/L Aids used	Made from
Maths: Counting numbers from 1-10 Subject Competence Identifies digits from 1-10 properly	•Counters •Number Charts	•Sticks •Straws •Stone •Bottle tops •Plane sacks •Card boxes
Language Competence Pronounces the digits name clearly	Real Objects	•Clay

Teaching and learning aids used by participants displayed on the wall in Uganda

[Image description: A piece of flipchart paper stuck on the wall with 3 columns with lots of writing in the columns. The columns are labelled: 'Subjects and learning competencies', 'T/L aids used' and 'Made from'.]

Activity 5.7b: A good teaching and learning aid should be...

Main



20 minutes

The purpose of this activity is to help participants understand the qualities of a good, appropriate teaching and learning aid. Give the following introduction:

'Good teachers should develop ways in which they work more as a team that share ideas and classroom materials. Not only will their lessons be more effective, but also their roles as teachers more interesting and their skill-set broader. In order to develop teaching and learning aids that will be long lasting as well as effective in teaching any given concept they were designed for, we are going to think in more detail about the qualities that are needed in a good teaching and learning aid'.

Ask participants to make suggestions of the qualities of a good teaching and learning aid. If they need a prompt, start the list by writing and explaining one of the points below. For example:

'A good teaching and learning aid is made of strong materials and therefore durable. This is because it should be shared with others and used again and again in different lessons'.

Write the suggestions as a list on the board/flipchart – after each suggestion ask for a more in-depth explanation.

By the end of the session you should have a list similar to this:

- Something that will help a learner to find the solution to a problem.
- Can be easily adapted to meet the needs of individual learners – for example, can be made into larger print for someone who does not see very well.
- Be interactive – something the learners can touch, investigate and manipulate.
- Be clear to see and shows relevant information.
- Made of strong materials that will be durable.
- Diagrams that show only relevant information. Should not be cluttered with unnecessary information or visuals.
- Fun to use (e.g., tactile dominos and number tiles).
- Clearly demonstrate the concept they were designed for. For example, if the lesson is about sizes from small to big, the teaching and learning aid should have several different sized objects (e.g., seeds/leaves/stones) that can be arranged in sequence of size from small to big.

Stimulate discussion by raising questions and asking for examples. Participants may want to talk about teaching and learning aids that have worked well in their lessons. Encourage the quieter participants to be involved in this discussion by asking them for examples of teaching and learning aids they have used, or will use, in their lessons.

Activity 5.7c: Demonstrations and role-play – teaching and learning aids made from things we usually throw away

Main



45 minutes

Demonstrate a number of teaching and learning aids (a minimum of 6).

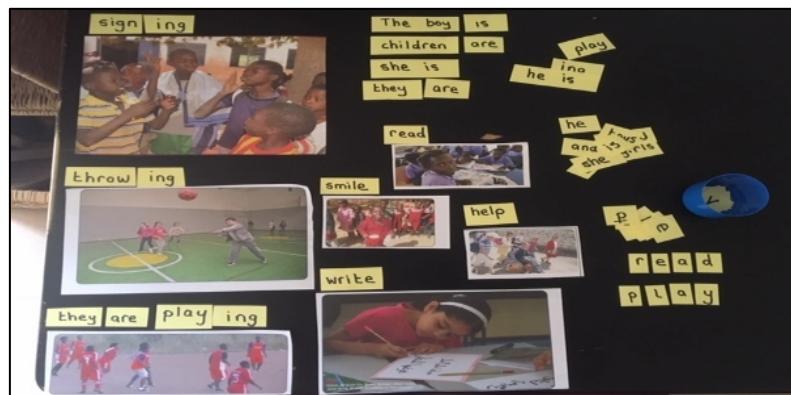
NOTE: The trainer needs to have prepared their resources prior to the training and be able to demonstrate how they will be used – she/he should also be able to clearly explain the learning objectives of the activities in which the learning and teaching aids are used. The teaching and learning aids to be demonstrated should cover a range of grade levels and subjects. They should be made from waste or locally available materials and do not cost money.

Discussion, questions and evaluations

Following the demonstrations, give participants the opportunity to evaluate each teaching and learning aid, identifying the good points of each one as well as suggesting areas for improvement. Participants should refer to **Activity 5.7b** (above) for criteria for what makes a good teaching and learning aid.

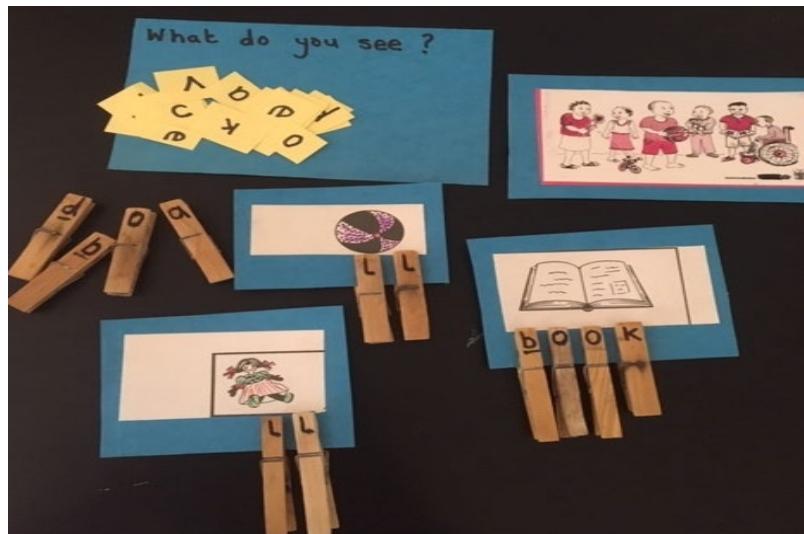
Ask for a volunteer who can lead this session and write the key points on the board/flipchart.

NOTE: The two examples below are found, together with other examples, in **Resource 5.25**. Cut them out – stick them onto strong card – and use them as training aids for demonstrations.



A teaching and learning aid for a language lesson, made from waste materials and old magazines. Used for comprehension with pictures, building words, building sentences, building action words (+ing). Easily adapted for all abilities, allowing learners to investigate and problem solve.

[Image description: There are seven photographs of learners engaged in activities such as writing, signing and playing ball games. Next to the photos are words and letters on yellow card. Some of the words and letters have been made into sentences to describe the pictures, e.g., 'they are playing'.]



Using old card, magazines and clothes pegs. Some learners may be able to identify objects, some may be able to build the words and then write them. Others may be able to write complete sentences about what they see in the picture.

[Image description: There are four pieces of blue card with pictures stuck on them. There are pieces of yellow card and clothes pegs, each with a different letter written on them. Some of the pegs have been made into words to describe the pictures, e.g., 'b.o.o.k.]

Activity 5.7d: Teaching and Learning Aids to Support SMART Goals

Main



30 minutes

Tell participants that in previous sessions about IEPs, they learned about the importance of SMART goals. Recall what a SMART goal is. Have participants share what they remember about SMART goals.

Remind participants in **Activity 5.3f: Stage 4 – Setting annual learning goals and short-term objectives**, they created different SMART goals for learners. **Resource 5.10** and **Resource 5.11** were used for this activity.

Now, they are going to have the opportunity to think about specific teaching and learning aids that could be created to support a learner in achieving these SMART goals. Before devising the learning aid, each group should decide the age of their learner and their general level of understanding/ability in relation to the task.

Participants work in groups. Give each group a SMART goal. Decide what SMART goals to allocate, for example, suggest some of the SMART goals created by participants in **Activity 5.3f**. Here are some further suggestions to use, further contextualising each goal as necessary:

- Play with others during water-play without splashing them.
- Understand the effects of water, temperature or light on plant growth.
- Understand chronological order.
- Begin to use prepositions for time, location and means.
- Able to demonstrate the concept of 'a whole' and 'a half'.
- Improve time management skills.
- Able to accurately describe their observations during a science practical experiment.
- Develop the skill to negotiate using toys and games with others.
- Able to summarise the day's events in a personal journal.

They should create a flipchart that details the information below:

SMART GOAL	IDEAS FOR TEACHING AND LEARNING AIDS	WHAT MATERIALS ARE NEEDED?	INSTRUCTIONS FOR HOW TO MAKE IT

They should generate ideas for different teaching and learning aids that could be created to support the learner to achieve this SMART goal. They should also be specific and realistic about what materials are needed. These should be low/no cost materials and emphasise reused materials. They should also indicate simple instructions for how to make it. When groups have finished, they can join with another group and share their ideas with each other.

Activity 5.7e: Adapting teaching and learning aids to include learners who have intellectual and/or developmental impairments

Main



60 minutes

Resource 5.26

Case studies for group-work

Divide the participants into 4 groups and explain that participants will remain in these groups for the following activities. Each group will be given the case study of a learner who has an intellectual and/or developmental impairment.

The aim of this activity is for the groups to read their case study and then consider each teaching and learning aid demonstrated by the trainer in **Activity 5.7c**. They must then answer the following questions:

- Is this teaching and learning aid accessible for the learner in our case study?
- If not, why not?
- How can it be adapted to be used by the learner in our case study?

During this activity, move around to guide and support each group. Ensure each group member understands the task and the details of the learner in their case study. Groups should look at each teaching and learning aid individually and make notes or a chart/diagram that answers the above questions for each teaching and learning aid.



Participants reviewing a group's findings during a gallery walk

[Image description: There are four people looking at a flipchart sheet stuck on the wall during a gallery walk, two women and two men. One man and one woman are standing up; the woman is speaking to the others, facilitating the discussion. One woman and one man are sitting down listening and looking at the flipchart sheet.]

Each group's findings should be displayed together with the case study of their learner – participants will be expected to review each display and add their own ideas for adaptations during a gallery walk. Alternatively, the participants can review the displays at the end of the training day or during breaks.

Activity 5.7f: Developing and making appropriate teaching and learning aids

Main



75 minutes

Resource 5.27

Learning outcomes and learners' profiles (case studies)

Introduce the activity by reminding participants that inclusive education is about meeting the needs of **all** learners. Teaching and learning aids can be used by all learners to enhance their learning experience and may need adapting to meet the needs of individual learners. This activity is to develop teaching and learning aids that can be used by all learners and are also adapted for learners with specific needs.

Present the four case studies from **Resources 5.27** or ask for a volunteer to read out each lesson's outcomes and details of the learners to consider. Each case study contains a basic lesson plan with clear learning outcomes and the details of individual learners who may need special consideration for inclusion. The lessons cover a range of topics such as agriculture, life-skills, languages, mathematics and science. The individual needs of the learners include visual impairment, behaviour difficulties, lack of concentration, hearing impairment, low self-esteem and shyness, learning difficulties, communication problems and physical impairments.

The participants should remain in four groups. One case study is given to each group. Each group must design and make a teaching and learning aid that fulfils all the criteria from the list in **Activity 5.7b: A good teaching and learning aid should be...**, using waste materials and locally available resources collected and brought to the workshop by the participants. The teaching and learning aid must help meet the learning outcomes, be used by all learners in the class and adapted to enable inclusion for the learners in their case studies.

EXAMPLE

Lesson plan for Grade 2 – English

Topic: Animals in Zambia

Objectives: Learners must be able to:

- Name 8 animals that are found in Zambia.
- Pronounce and spell the names of 8 animals that are found in Zambia.
- Form sentences that include the names of different Zambian animals.

Learners with additional needs

- Noah – partially-blind and is learning to type braille but can see some shapes and colours.
- Allan and Kakanda – severe reading difficulties –they have also missed a lot of school in the past and they do not speak the local language.
- Innocent – has difficulties with speech and struggles to pronounce words.

The group must develop a teaching and learning aid that helps learners identify and name 8 animals that can be found in Zambia. The aid must help learners spell and pronounce the animals' names as well as form sentences that include the names. When making the teaching and learning aid the group should consider whether it is necessary to adapt the aid to help Noah, Allan, Kakanda, and Innocent to achieve the learning outcomes. They must then also make and demonstrate the adapted teaching and learning aid.



Creating teaching and learning aids in Uganda

[Image description: Participants making letter cards with cardboard, glue, and seeds.]



Creating teaching and learning aids in Uganda

[Image description: Participants making picture-word cards with cardboard, glue, and bottle caps.]

Presenting

After 30 minutes, ask each group to present their teaching and learning aid, explaining clearly how it meets the criteria from **Activity 5.7b**, how it enhances the lesson and how it is adapted and used by the individual learners in their case study. Groups can decide the format of their presentation and may choose to use drama and role-play to show how the teaching and learning aid is used in the lesson.



Participants making teaching and learning aids out of locally available materials in Uganda

[Image description: Two male participants are sitting at a table on which there are various locally available materials for making teaching and learning aids.]

Note to the trainer: Participants can be encouraged to suggest and write their own lesson plan if they prefer, however, these must be reviewed by the trainer prior to beginning the activity. This is to ensure the learning outcomes are clear and realistic and that there is still a diverse range of lesson topics.



Letter-syllable-word-picture display charts created using locally available materials in Uganda

[Image description: A letter-picture chart shows the letter P with a picture of a parrot and a pig. An adjacent chart to the right displays the words “pig” and “parrot”. An adjacent chart to the left displays the letter P with various vowels for constructing the syllables “pa” “pe” “pi” “po” and “pu”.]

Section 5.8: Action Research

Activity 5.8a: Action Research Preparation

Main



60 -75 minutes

Give [Resource 5.28: Action research tasks](#) to participants, and explain it, in order to help prepare participants for the tasks that they will need to complete before returning for the next training of trainers/teachers.

Reiterate that the action research is a critical component of ensuring that the information and skills provided in these inclusive education modules are put into practice. It is also a way to improve our IETT competency. [Resource 5.29](#) shows the domains and competencies of the framework for additional reference if needed.

Evidence of action research completion is VERY important. Emphasise that participants should bring their evidence of having completed the action research tasks to the next training.

Resource 5.28

[Action Research tasks](#)

Resource 5.29

[IETT self-assessment framework domains and competencies](#)

Resources

Module

5

Resource 5.1: Individual education plans

An individual education plan (IEP) is a process in which learners, teachers and other relevant stakeholders, including parents/caregivers, but also sometimes other specialists where they exist, are involved in discussions about an individual's strengths, areas for development and goals for self-improvement.

An IEP:

- is used for learners who have been identified as experiencing, or likely to experience, difficulties with accessing school, participating and learning/achieving. These learners may have special educational needs and/or disabilities, but IEPs may also be used with learners who have no special educational needs and/or disabilities but who experience other additional needs,
- is a tool for helping to plan a learner's education. It may also include plans for rehabilitation activities linked to education,
- is individual for that learner and fully takes into account her/his abilities and needs,
- is a guide for teachers to help the learner in her/his learning,
- is a guide for the inputs that will be given by other support staff, where they exist,
- sets targets and goals against which the learner's progress can be observed, and
- allows teachers to collaborate with the learner and parents/caregivers.

An IEP could include:

- a summary of the learner's strengths and interests;
- a description of the difficulties faced by the learner and her/his preferred learning style;
- a plan of action to overcome the stated difficulties;
- explanations of roles and responsibilities for supporting the learner (things the teacher will do; things other staff will do, where they exist; things parents/caregivers will do, and so on);
- clear goals for the learner to achieve and a time frame for achieving them;,,
- specific activities and actions to help the learner achieve the goals;

- ideas for how the learner's teacher(s) can adapt the curriculum;
- details of 'reasonable accommodations'/adjustments that need to be made in the school environment, or with equipment and materials; and
- ways to evaluate or assess progress, and information on whether or how standard tests or exams will be adapted for the learner.

IEPs should be regularly reviewed and updated, with involvement from the learner, parents/caregivers, teachers and other relevant stakeholders. In some countries the Ministry of Education provides a standardised format and process for creating and monitoring an IEP. In some countries the IEP is a legally binding document – the school, teachers and other specialists are legally obliged to provide the support outlined in the plan. In other countries, IEPs are created differently in different areas or schools and do not have the same legal status.

Resource 5.2: Individual education plans – additional information

1. What is an IEP?

- An IEP is a planning tool specifically created for those learners who have educational needs that go beyond the regular classroom teaching and support given to ALL learners. These are learners who, despite differentiated classroom teaching and support from teachers, do not achieve the set learning competences expected for their grade and age.
- It gives direction on how these learners' educational needs will be addressed.
- It is specific to the learner for whom it is designed. It is therefore based on a thorough understanding of educational strengths and needs of that learner.
- It can be revised depending on the learner's ongoing performance and needs. It is therefore a working document and should be updated regularly.

An IEP is NOT:

- a lesson plan;
- developed for the whole class;
- to be used for learners other than the learner it was created for;
- a description of everything that will be taught to the learner;
- a list of all the teaching strategies used in regular classroom instruction; and
- just an unchanging plan that is used over and over.

2. Who needs an IEP?

An IEP is a learner-specific plan that is developed for a particular learner who has been identified¹ as requiring additional support.

Most learners achieve what is expected of them with the help of good teaching from their teachers. Good teachers use a variety of teaching and assessment strategies and materials to teach learners who have different learning styles and needs.

However, for some learners, this good instructional support is still not enough to help them achieve the learning outcomes that are expected. These learners are identified as experiencing learning challenges that require additional support, and they are likely to benefit from having an IEP.

Some countries have laws that require an IEP to be developed and implemented for every learner who has been identified as having learning challenges that require additional support, beyond general good quality classroom support.

Some countries do not have these laws yet, but their governments have nevertheless adopted international laws, agreements and other instruments that demand that *all* learners – including learners who require additional support such as those with additional needs – are included in the learning process and are supported in achieving their learning potential.

Some of the international instruments were discussed in the inclusive education concepts and theories training module (see [Module 1](#)).

They include the following:

The World Declaration on Education for All and Framework for Action to Meet Basic Learning Needs, 1990 is a global commitment to provide education to all. It outlines an agreement among participating countries to adopt an expanded vision of basic education and a renewed commitment to ensure that the basic learning needs of *all* children, youth and adults are met effectively in all countries.

¹ Identification does not necessarily mean being formally identified using specialist assessment teams, although this is the case in some countries. In many countries identification of learners' support needs is done successfully by the teacher in collaboration with education colleagues, the child's parents, etc.

The Salamanca Statement and Framework for Action 1994 arose from a world conference on special needs education. The Statement notes that inclusive education is a fundamental component of the global commitment to provide education for all. It outlines principles, policies and practices that countries should use in providing quality education for *all* learners including learners with disabilities.

The United Nations Convention on the Rights of the Child (UNCRC), 1989 has a commitment to uphold and protect rights of children in the country, including those with disabilities.

The United Nations Convention on the Rights of People with Disabilities (UNCRPD), 2006 is a landmark international treaty that impacts upon people with disabilities. Article 24 of the UNCRPD requires that signatories to the Convention ensure an inclusive education system at all levels, and lifelong learning, directed to:

- the full development of the human potential and sense of dignity and self-worth of people with disabilities;
- the development by persons with disabilities of their personality, talents and creativity to their fullest potential; and
- enabling persons with disabilities to participate effectively in a free society.

In realising this right, States Parties shall ensure:

- that persons with disabilities are not excluded from the general education system on the basis of disability;
- that persons with disabilities can access inclusive, quality, free primary and secondary education on an equal basis with others in the communities in which they live;
- reasonable accommodation of the individual's requirements; and
- that persons with disabilities receive the support required.

The Sustainable Development Goals (SDGs), 2015, are 17 global goals that were agreed in 2015. They outline vital changes that the world needs to achieve before 2030. SDG 4 focuses on education and states that stakeholders must "...ensure inclusive and quality education for all and promote lifelong learning".

Bearing all this in mind, schools have a responsibility to develop and implement IEPs for learners who require additional support or who have been identified as having special educational needs.

Very often teachers are concerned about the time and effort that is needed to develop and implement an IEP. **However, research shows that only a small percentage of learners will need an IEP.** Most learners will achieve the set learning outcomes and will not need an IEP, **if they receive good teaching from teachers who use differentiated instruction and assessment strategies.**

An IEP is a very useful tool that can help schools to achieve what every school is required to do by law – ensure that **all** learners learn. It is vital, however, that IEPs are not seen as a substitute for ongoing efforts to improve the quality and flexibility of **all** teaching for **all** learners.

3. Advantages of IEPs

The IEP provides several advantages to the national education system and the learner. IEPs are designed to address some of the exclusion practices that exist in schools. Learners who do not respond to general classroom teaching and support are often viewed as not capable of following a national curriculum. They are often given alternative curricula, which very often limits the learner from achieving their full potential. These alternative curricula may not prepare learners for adult life, as the learning outcomes are severely limited and the expectations are very low.

IEPs are one of the strategies used to give life to the concept of inclusive education and inclusion principles. They:

- promote an inclusive education system through the use of a common curriculum;
- allow all learners to be included in the same national curriculum and assessment processes;
- ensure that national governments are held accountable for learners, irrespective of who they are and their abilities;
- move away from the deficit model and make sure every learner is supported to reach their full potential;
- prepare learners for life beyond formal schooling,

- prepare learners to contribute to a country's economic and social development;
- encourage teachers and parents/caregivers to view all learners as needing support to achieve the outcomes of the general curriculum;,,
- facilitate the working together of all general education teachers and special education teachers (where they exist) to ensure that learners achieve the national curriculum outcomes;
- ensure greater consistency across schools, regions, and districts; and
- encourage higher expectations for all learners.

Resource 5.3: Components of an IEP

An IEP has the following components or characteristics:

Learner identification information

This section outlines learner identification information and some background information. These include:

- learner name;
- date of birth;
- learner number;
- parent/caregiver names and contact details;
- learner's home language and other languages that the learner uses;
- learner's school name and address;
- learner's current grade;
- schooling history (for example, What schools and classes did they attend previously? Where were these schools located? Have they missed significant periods of schooling? What was their performance in these past settings?);
- details of any previous efforts to support the learner; and
- medical history, if any.

Current level of performance in different areas

This includes:

- a list of all subjects/courses in which the learner requires support;
- the learner's current level of achievement in each subject or course that he/she needs support on (ideally this should involve more than end of term/end of year examination scores; results of regular classroom assessments FOR learning - formative assessment - are helpful);
- the strengths and challenges that relate to the learner's learning; and
- relevant assessment data supporting the decision that the learner requires support (ideally this should involve more than end of term/end of year examination scores).

Identification of priority needs and performance goals and indicators

This includes:

- prioritised learning needs;
- description of annual goals and learning expectations (including academic and functional goals) for each learning area in which learning support is required; and
- description of benchmarks or performance objectives for each annual goal; the goals should be specific, measurable and achievable.

Identification of instructional and assessment strategies

This includes:

- description of the teaching and assessment methods that will be used to teach the learner and assess her/his achievement;
- resources that will be required to implement the IEP; and
- roles and responsibilities of different IEP members.²

Implementation time frames

- This states when implementation will start and when progress will be reviewed.

Progress report

- This gives a clear indication of the way in which the learner's progress will be reported to parents/caregivers and other officials, the dates on which reports will be issued, and the frequency of reporting.

Team members' signing off section

- The names and positions of the IEP team members are given.

Monitoring, evaluation and review

This includes:

- how the IEP will be evaluated; and
- dates and times of review.

² Resource 5.15 (later in the module) give a list of possible IEP team members.

Resource 5.4a: An IEP sample

Reason for developing the IEP

Learner profile

Name _____

Gender _____

Date of birth _____ Age _____

School _____

Learner registration number _____

School year/grade _____

Parent's/caregiver's name _____

Address _____

Telephone number _____

Summary of assessment data

List relevant educational, medical/health, psychological, speech and language, and behavioural assessments

Information	Date	Summary of results

Summary of learner strengths and needs

Areas of strength	Areas of need

Support targets

Annual goals and objectives

Area: Reading comprehension

Annual long-term goal: By the end of the school year Bridget will improve reading comprehension and increase her understanding of vocabulary by 80%.

			Monitoring		
Short-term objectives/ benchmarks	Who will provide support?	Evaluation method	Initial date	Check date	End of goal date
Bridget will read a short paragraph and correctly answer 2 out of 3 questions by the end of the first 9 weeks		Work samples in her exercise book Teacher Observations			
Bridget will read and correctly identify the definition of 7 out of 10 key vocabulary terms from the local language lessons		Work samples in her exercise book Group vocabulary activities Teacher Observations			

Teaching strategies:

Resources:

Assessment strategy:

Annual goals and objectives

Area: Language/social skills

Annual long-term goal: By the end of the year Bridget will be able to maintain a conversation through at least 3 exchanges of information 75% of the time.

			Monitoring		
Short-term objectives/benchmarks	Provider	Evaluation method	Initial date	Check date	End of goal date
Bridget will maintain a conversation through 3 exchanges of information by asking questions of her peers.		Teacher Observation of group discussion/group work in class			
Bridget will contribute to a conversation through 3 exchanges of information by giving appropriate responses to questions asked by her peers.		Teacher Observation of group discussions/group work in class			

Teaching strategies:

Resources:

Assessment strategy:

Supplementary support

Related services	Provider	Hours/minutes per week	Location
Guidance/counselling	Senior Woman teacher	30 minutes per week	Learning support base

Progress report

How will progress be communicated?

Parents/caregivers will be informed of their child's progress towards annual goals using same reporting methods as other learners.

IEP team signatures

Name	Title	Signature

IEP components checklist

Component	Yes	No
Learner information		
Name		
Date of birth		
Learner number		
Parent/caregiver names and contact details		
Learner's home language		
Learner's school name, address		
Learner current grade		
Date of initial IEP meeting		
Date of IEP review		
Current level of performance in different areas		
Information organised by functioning area/domain		
Current level of performance written in a precise way to identify areas of challenge		
Learner's needs identified and prioritised		
Learner specific short-term objectives		
Objectives based on learner's current level of performance		

Objectives stated in positive language (what the learner will be able to do)		
Number of objectives are achievable and manageable in the given time frame		
Achievement indicators are included (it is clear how the progress will be measured)		
Annual long-term goal		
Annual goal linked to short-term objectives/benchmarks		
Annual goal is broken down into small achievable steps		
Time when goals and objectives will be achieved is indicated		
Instructional strategies		
Instructional strategies are outlined		
Resources to be used are stated		
Assessment process is indicated		
Strategies are achievable and realistic in the context		
Team members		
Implementing team members are indicated		
Learner is included in the process of IEP development and implementation		
Parents/caregivers are included in the process of IEP development and implementation		
Evaluation and review		
How the IEP will be evaluated is noted		
Dates and times of review are indicated		

Resource 5.4b: Zambian IEP sample

SCHOOL BASED INDIVIDUALIZED EDUCATION PLAN

1. CHILD'S BIO DATA

Name of Child: DOB: Gender:
School: Year entered school:
Grade/Level:
Place of Birth: Number in Family: Position:
Name of Father: Occupation:
Mother: Occupation:
Residential Address: Phone:

Nature of Disability:

Previous Assessments:

2. IEP FOCUS AREAS (Domains/ Subject areas):

3. IEP PERSONNEL/STAFF (Multi-Disciplinary Team):

4. PRESENT LEVEL OF PERFORMANCE

a) **Strengths (abilities):** *Child is able to:*

b) **Emerging skills/abilities:** *Child has difficulties with:*

c) **Weaknesses(deficits/needs):** *Child is not able to:*

5. OBJECTIVES

- **Long Term Objective:**
- **Short Term Objectives:**

6. Resources/Materials needed : (Equipment or materials needed are):

7. Teaching context : (where will the teaching take place):

Criterion of success: Prompts:

Rewards (*Reinforcements*):

How often to practices (*teaching*):

8. Date of initiation of programme: **Expected review dates:**

9. Key IEP Teacher: **Sign:**

10. Programme Schedule Details:

Date Initiated	Date achieved	Specific Teaching objectives (Targets to be achieved)	Activity	Evaluative comments

11. Date programme ended:

12. Evaluation:

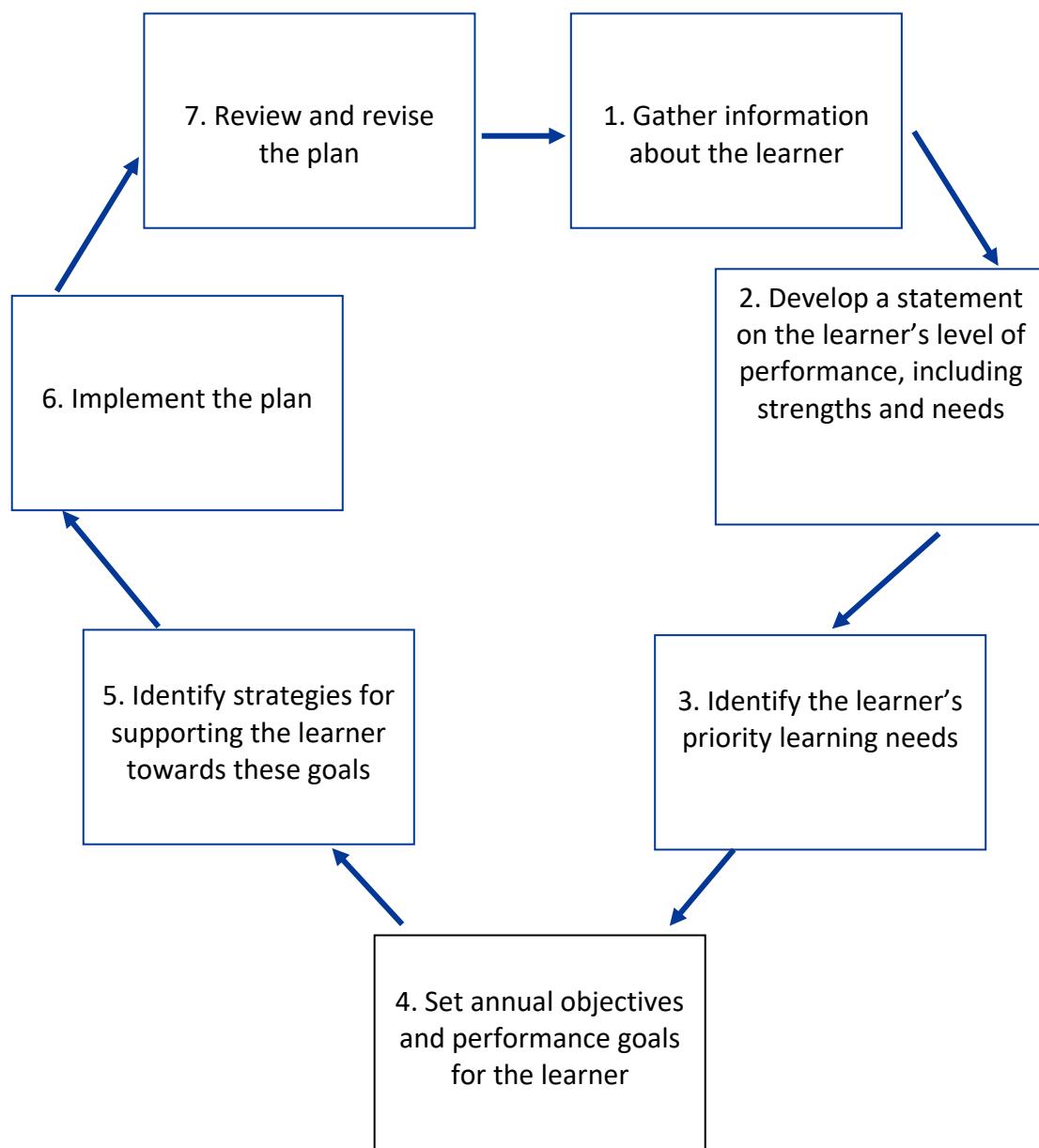
13. Signed:

Resource 5.5: IEP development process stages

The trainer should cut out these cards and mix them up before giving them to participants.

Gather information about the learner	Develop a statement on the learner's level of performance, including strengths and needs
Identify the learner's priority learning needs	Set annual objectives and performance goals for the learner
Identify strategies for supporting the learner towards these goals	Implement the plan
Review and revise the plan	Additional tasks

Resource 5.6: The cyclical nature of the IEP development process



Resource 5.7: Starting the IEP development process

Developing and implementing an IEP is a process that involves collaboration among different members. These include the school, parents/caregivers, the learner (if possible), and other relevant professionals and agencies (if available in the context). The nature and quality of this collaboration process contributes to the quality and effectiveness of the IEP.

The IEP involves a continuum of strategies used to assist the learner to achieve curriculum outcomes. The process therefore begins in the classroom. Teaching and learning should always be a collaborative process involving the teacher, the learner, and her/his parents/caregivers. A teacher uses a variety of teaching and assessment strategies to facilitate learning. Parents/caregivers play a role in supporting the teaching and learning process. Most learners will respond well to this learning support and achieve the expected curriculum outcomes. A few learners may not respond well and may require more support. The teacher may request additional help or advice from colleagues to help them teach these learners. In many cases, this will be enough to help the teacher successfully address the learner's needs.

However, a few learners will still find it difficult to achieve the learning outcomes even with skilled classroom instruction and with the teacher receiving additional support from colleagues. The class teacher, learner, parents/caregivers, and other teacher(s) may then decide it is appropriate to request the involvement and collaboration of other people to help them deal with the learner's difficulties. This might mean be a school inclusion team (SIT) (where one exists), or staff members from outside organisations, etc. These additional people can help to gather more information about the learner and offer advice for improving the support she/he receives with learning in and out of school. If the learner still experiences difficulties achieving the desired learning outcomes, the various people involved may eventually decide that the learner's support needs can best be addressed through the development and implementation of an IEP.

At this point the teacher, with the support of other people with various expertise and experience, co-ordinates the development and implementation of an IEP. It is important for the teacher to play a central role in the IEP process because it is the teacher who carries the responsibility of teaching, assessing,

and reporting on the learner's progress, so she/he needs to be informed and empowered to do that.

In some countries, the IEP process is led by specialist staff, who – in effect – dictate to the teacher what she/he should do. This often leads to resentment by teachers and a lack of 'ownership' of the plan by the teachers, even though they are the ones who need to do the work to implement it in the classroom. In Zambia, therefore, it is vital that an IEP process supports and empowers the teacher, as well as enabling other key stakeholders (especially the learner and parents/caregivers) to be involved. The role of any specialist is supportive and focused on capacity development, rather than sole expert.

Resource 5.8: Stage 1 – Gathering information about the learner

Box 1

Once the school has agreed on the development and implementation of an IEP for a particular learner, the team of people who will be working on the IEP should make sure they have a learner profile that enables them to thoroughly understand the learner.

The learner profile is an important basis for effective IEP planning and implementation – an IEP will not work well if those involved do not understand the learner and her/his strengths, weaknesses, interests, abilities, etc.

The team may already have some of the information for the learner's profile. To ensure that the information is as complete as possible, the team should ask:

- What do we need to know about the learner?
- What information do we have?
- What additional information do we need?
- How do we get this information?

Box 2

Depending on the information required, the team can get information about the learner from different sources. Some of the sources the team can use include:

- learner's school/classroom file;
- parents/caregivers and family;
- the learner themselves;
- class teachers;
- specialist staff (such as speech and language therapists, social workers, psychologists, where such support exists);

- medical staff;
- community leaders involved in the learner's life;
- IEP team members; and
- learner work samples (past examination papers, classroom assessments, exercise books, etc.).

This information can be obtained using a variety of methods including:

- Discuss on a one-to-one basis with the learner about his or her learning preferences, their thoughts about their own strengths and needs, what makes him/her happy or unhappy in school, etc.
- Use class activities to raise these issues (e.g., what we like and do not like in school), and record the learner's opinions during these activities.
- Discuss with parents/caregivers to learn their view of their child's development preferences, strengths, needs and motivations.
- Discuss with previous teachers about strategies that have been effective or ineffective with the learner.
- Review the learner's file (if the school keeps files for all learners).
- Review the learner's work samples gathered from all classes and subjects.
- Review current classroom assessments and performance records.
- Conduct focused observations that provide objective information on how the learner functions in a variety of situations.
- Use formal assessment tools.

Resource 5.9: Stage 2 – Form for documenting learner’s profile and performance

Background information

1. Early intervention: what has been done previously and by whom

(Possible sources: parents/caregivers, therapists, early childhood teachers, medical professionals, staff from outside organisations, IEP team members)

Nature of support	Name of provider	Contact details

2. Family and home situation: include information on family history, languages used in the home, daily activities, siblings, etc.

(Possible sources: family, parents/caregivers)

3. Parents’/caregivers’ understanding of the learner: how parents/caregivers understand their child’s strengths, challenges, and motivations

(Possible sources: parents/caregivers)

4. Learner’s preferences and learning styles

(Possible sources: teachers, learner, parents/caregivers, siblings, peers, observations)

5. Current levels of performance: state both strengths and challenges (e.g., Communication, Movement, Hearing, Seeing, Thinking, Emotional, Behaviour, Attention)

Area 1

Strengths	Challenges

Area 2

Strengths	Challenges

Area 3

Strengths	Challenges

6. Summary of enabling factors (that could help the learner overcome challenges) and barriers (that could hinder progress in overcoming the challenges)

Enabling factors to OVERCOME challenges	Barriers that could HINDER progress

Resource 5.10: Stage 4 – Setting annual learning goals and short-term objectives

Box 1 – setting annual learning goals

Once learning needs have been grouped and prioritised under learning areas, goals can be set for the learner, relevant to these learning needs. These goals should be short and specific and say what the learner will do at the end of a specified period of time, which is usually one school year.

An example:

- **Learner:** Thomas
- **Functional area:** Communication
- **Current achievement/functioning:** Thomas struggles to take appropriate turns in conversation with his peers. He frequently talks over them and interrupts them rather than listening to them during group conversations.
- **Annual learning goal:** By the end of the school year Thomas will be able to maintain a conversation with peers through at least 3 exchanges of information, 75% of the time.

For the plan to be effective the IEP team should not identify too many annual goals. The number should be relatively easy to manage.

Each goal should:

- address a priority learning need identified in the learner profile;
- be linked to the learner's current level of performance;
- challenge the learner, but not so much that the learner fails to achieve the goal;
- be achievable;
- focus on what the learner will learn (rather than on what teachers will teach); and
- identify what the learner will *do* (rather than what he or she will stop doing).

It is often said that effective learning goals should be written following the SMART principles:

Specific – written in clear language that is not confusing.

Measurable – can be easily described, assessed, and evaluated.

Achievable – realistic for the learner.

Relevant – meaningful for the learner.

Time-related – able to be achieved within a specific time period.

A learner's specific annual learning goal should state:

- the action that the learner will undertake;
- how the learner will accomplish the action and/or what the learner will focus the action upon;
- where the learner will accomplish this action;
- the criteria by which success of the action will be determined;
- by what date the learner will be able to accomplish said action.

SMART goal statement:

Learner X will (action) (how/what) (where) (by what criteria) (by what date).

Example of broad and vague annual goal for learning:

Caroline will improve her reading.

Example of a SMART annual goal for learning:

Caroline will read one page from a thematic P3 reader in the P3 classroom with 95% accuracy by November.

In the above SMART annual goal for Caroline, we can identify the:

- Action
- How/what
- Where
- By what criteria
- By what date

Example of broad and vague annual goal for learning:

Fanwell will improve his handwriting.

Example of a SMART annual goal for learning:

By December, Fanwell will write all 26 uppercase and lowercase letters of the English alphabet with correct formation 80% of the time in his exercise book in the P4 classroom.

Box 2 – breaking annual goals into short-term objectives

The time frame for achieving a learning goal is usually a year. It is therefore important that the IEP team breaks the annual goal into smaller steps that can be more easily managed, observed, and measured in a shorter time. These steps are sometimes called short-term objectives or benchmarks. The learner's achievement of these short-term objectives will eventually result in the achievement of the larger annual goal.

The writing of short-term objectives involves breaking down the annual goal into manageable tasks. These short-term objectives should also provide greater detail regarding the 'what', 'where', and 'how' of instruction and assessment.

The IEP team prepares the short-term objectives by:

- identifying the components or steps involved in achieving the annual goal;
- organising and ordering these component tasks into a logical sequence;
- describing how the learner will show that the short-term objective has been achieved;
- identifying the date when achievement is expected;
- specifying the conditions under which the learner will perform the task (e.g., relevant environmental factors, level of assistance required, equipment needed);
- determining the criteria (e.g., accuracy, duration, rate, standard of performance) for attainment of the short-term objective.

Because short-term objectives are small steps towards the annual goal, they should be achieved within a reasonable period of time. This could be within weeks, depending on the complexity of the objective. The learner's progress on achieving the short-term objective should be reviewed, assessed, and revised regularly. It would be helpful and be inclusive if monitoring of the

learner's progress is included in the school reporting period/learner progress reporting.

SMART annual goals and short-term objectives for learning:

Example 1: Caroline

Annual Goal: Caroline will read one page from a thematic P3 reader in the P3 classroom with 95% accuracy by November.

Short-term objective 1: Caroline will state all the letter sounds of the alphabet in the P3 classroom with 95% accuracy when assessed by the teacher using alphabet flashcards by June.

Short-term objective 2: Caroline will blend and read 3 letter words in the P3 classroom with 80% accuracy when assessed by the teacher using word flashcards by August.

Short-term objective 3: By October, Caroline will read simple sentences with fluency in the P3 classroom with 90% accuracy when assessed by the teacher using sentences written on the blackboard.

Example 2: Fanwell

Annual Goal: By December, Fanwell will write all 26 uppercase and lowercase letters of the English alphabet with correct formation 80% of the time in his exercise book in the P4 classroom.

Short-term objective 1: By June, Fanwell will demonstrate his ability to properly grasp and hold his pencil during 4 out of 5 observations conducted by the teacher in the P4 classroom.

Short-term objective 2: By August, Fanwell will write all 26 lowercase letters of the English alphabet with correct formation 50% of the time in his exercise book in the P4 classroom.

Short-term objective 3: By October, Fanwell will write all 26 uppercase letters of the English alphabet with correct formation 50% of the time in his exercise book in the P4 classroom.

Resource 5.11: Stage 4 – Creating SMART goals

Specific – written in clear language that is not confusing.

Measurable – can be easily described, assessed, and evaluated.

Achievable – realistic for the learner.

Relevant – meaningful for the learner.

Time-related – able to be achieved within a specific time period.

Broad/vague goal	Possible SMART annual goal and short-term objectives
Collins will become more sociable	Annual goal: Short-term objective 1: Short-term objective 2: Short-term objective 3:
Beverley will get better at maths	Annual goal: Short-term objective 1: Short-term objective 2: Short-term objective 3:
Limpo will stop being naughty	Annual goal: Short-term objective 1: Short-term objective 2: Short-term objective 3:

Ideas for answers are given below [this should be kept by the trainer, not given to participants as part of Resource 5.11].

Broad/vague goal	Possible SMART annual goal and short-term objectives
Collins will become more sociable	<p>Annual goal: By December, Collins will play appropriately with his peers during free-play activities in the P1 classroom for at least 15 minutes as observed by the teacher.</p> <p>Short-term objective 1: By the end of March, Collins will use his words to communicate to the teacher the activity that he wishes to engage in during Friday free-play time in the P1 classroom.</p> <p>Short-term objective 2: By the end of June, Collins will play appropriately with other learners during Friday free-play time in the P1 classroom for at least 5 minutes without becoming upset.</p> <p>Short-term objective 3: By the end of September, Collins will engage in appropriate turn-taking with the play materials during group play activities 4 out of 5 times during observations conducted by the teacher in the P1 classroom.</p>
Beverley will get better at maths	<p>Annual goal: By December, Beverley will obtain at least 70% on her end of year classroom mathematics examination in the P6 classroom.</p>

	<p>Short-term objective 1: Within 4 weeks, Beverley will demonstrate improved understanding of subtraction, by getting at least 50% of the sums correct in her exercise book during mathematics instruction in the P6 classroom.</p> <p>Short-term objective 2: Within 8 weeks, Beverley will demonstrate improved understanding of multiplication, by getting at least 50% of the products correct in her exercise book during mathematics instruction in the P6 classroom.</p> <p>Short-term objective 3: Within 12 weeks, Beverley will demonstrate improved understanding of division, by getting at least 50% of the quotients correct in her exercise book during mathematics instruction in the P6 classroom.</p>
Limpo will stop being naughty	<p>Annual goal: By the end of the school year, Limpo successfully participate and complete P5 classroom activities 9 out of 10 times as observed by the teacher during daily teaching instruction and classroom observation.</p> <p>Short-term objective 1: By the end of Term 1, Limpo will be able to do a 10-minute individual learning task without needing to be reminded or redirected by the teacher as observed by the teacher during P5 class time.</p>

Short-term objective 2:

By the end of Term 2, Limpo will be able to participate in a 20-minute group learning task without needing to be reminded or redirected by his peers and/or the teacher as observed by the teacher during P5 group work.

Short-term objective 3:

By the middle of Term 3, Limpo will demonstrate the self-monitoring strategies he has been taught for focusing and keeping on-task during classroom activities in the P5 classroom (for example, closing his eyes and taking deep breaths in order to refocus; re-reading his annual goals and short-term objectives written in the front page of his exercise book; asking his classroom buddy for support in focusing on the learning task; etc.).

Resource 5.12: Stage 5 – An example of documenting performance goals, teaching strategies and learning materials

Annual goal Caroline will read one page from a thematic P3 reader with 95% accuracy in the Primary 3 Literacy 1 class, by November.		
Short-term objective <ul style="list-style-type: none">Caroline will be able to quickly read frequently occurring words in the P3 thematic curriculum, with 90% accuracy, by the end of 8 weeks.The words are [list the words]. Short-term objective <ul style="list-style-type: none">Caroline will be able to read simple sentences that contain frequently occurring words in the P3 thematic curriculum, using various strategies, 90% of the time when reading in class, within 8 weeks.	Review date	Review comments
Teaching strategies <ul style="list-style-type: none">Frequently occurring words written on classroom charts, in learner exercise book, on flashcards for repeated practice, and practiced at home.Teacher reads aloud P3 thematic readers and other stories to the class.Teaching letter sounds and using letter sounds to decode/read simple words and short sentences.Frequent opportunities to read and write words in creative ways (sky writing, creating oral stories with words, etc.).Frequent encouragement of the specific efforts and progress that learner is making (Example, “I noticed that when you came to that word you did not know, you identified the sound of the first letter in the word, and then the second letter, then you blended the sounds together to help you read the word. That’s excellent.”		

Materials / resources / games

- P3 readers or teacher-created texts using P3 thematic curriculum themes and vocabulary words.
- Word learning/practice games.
- Flashcards using strips of manila paper or cardboard.
- Early grade literacy teaching strategies (letter sounds, vocabulary teaching, reading comprehension, etc.).

Support services

- Mrs. Mumba – class teacher.
- After school library time – reading with a reading buddy – 2 X 30 minutes per week.

Parents/caregivers

- Practice word flashcards with the child.
- Have conversations with the child about the words they are learning and use the words in sentences.
- Practice spelling the words around the compound (writing words in the sand/ground with a stick/finger, writing the words with a finger in the air (sky writing)).
- Read exercise book or other stories for 10 minutes every evening.

Assessment strategy

Write your ideas here:

Resource 5.13: Stage 6 – Implementing, reviewing, evaluating. Stage 7 – Revising the IEP

Once the IEP has been documented it needs to be implemented. The nature of the implementation will depend on each unique plan – each individual educational plan is **specific to the needs of one learner**. The learner's progress towards achieving the plan's goals is also monitored.

The IEP can and should be reviewed and revised depending on the learner's progress. Sufficient time should be given to see if a particular strategy is helping the learner (i.e., do not revise the plan and change direction before there has been a fair chance to see if it is helping the learner). But equally, the plan should not stay unchanged for a long time if it is clearly not helping.

Those involved should keep a record of any review activities and decisions, for later use. A simple record form, like the one below, can be used to record parent/caregiver–teacher interactions and review processes.

Date	Activity (indicate parent/caregiver: teacher interaction; other consultations)	Outcome	Signatures
15.04.20__	<ul style="list-style-type: none">• Learner performance review meeting	<ul style="list-style-type: none">• Learner to continue with the programme.• Teacher to give extra word reading practice to learner for completing at home.• Parent/caregiver to support at home for 15 minutes of reading and discussion each evening.	Teacher..... Parent/ Caregiver Learner..... (Others as appropriate)

		<ul style="list-style-type: none"> • Peer reading support for during after school library time to increase to 3 times per week instead of 2 	

A simple tool can be used to check or evaluate if the learner has reached the desired short-term objectives and annual goals. Information obtained from this evaluation can be used to report the learner's progress. Learning is an ongoing process so this tool should be able to report on the degree to which the learner is able to show the short-term object. Progress should not be recorded as 'all or nothing'.

For example

If the short-term objective is:

Caroline will be able to quickly read frequently occurring words in the P3 thematic curriculum, with 90% accuracy, by the end of 8 weeks.

The words are [list the words]

After 8 weeks the learner's actual performance could be recorded as:

Caroline is able to quickly read frequently occurring words in the P3 thematic curriculum with 70% accuracy.

The wording of this record is positive. This is better than recording progress from a negative perspective, such as "Caroline is not able to read frequently occurring words...."

Positive reporting is encouraging to the learner and shows progress towards reaching the annual goal.

Resource 5.14: Case study for IEP development

Thandiwe is a 16-year-old female learner. She is currently enrolled in O-Level of secondary school. Thandiwe shares her home with her mother, an older brother, and a younger sister. The family is not well off but is very loving and supportive of each other.

Thandiwe has some strengths. They include strong maths skills and spelling skills. Thandiwe enjoys reading, although very often she does not understand what she is reading.

At times she shows inappropriate behaviour. For example, other learners do not like interacting with her because she talks a lot in a group and wants everyone to listen to her. When others try to talk, she gets very upset and tries to injure herself and hit others. She also repeats questions she is asked and finds it very difficult to work on her own.

These behaviour difficulties make it hard for Thandiwe to participate in class and socially. She has recently been assessed by an agency outside of the school setting and the assessment results show the following:

Assessment date	Area	Results
20.11.2021	Educational	<ul style="list-style-type: none">Reading – Primary 6 level.Mathematics – O Level Year 2.Science – Primary 5.
13.11.2021	Psychological	<ul style="list-style-type: none">Above average intellectual functioning.Behaviour difficulties.Indications of autistic behaviour.
17.11.2021	Speech and language	<ul style="list-style-type: none">Some language difficulties and poor use of language in social situations.

Resource 5.15: IEP team members

Different countries use different names for the team that is responsible for developing and implementing the IEP. Whatever name they are given the team should be made up of people who have the knowledge and skills to identify the learner's needs and to develop and implement a plan to address those needs. Therefore, who is included in the team will largely depend on the needs of each learner and the availability of services in that particular school, community, district, and region.

The IEP team members are likely to include:

The learner

Learners as young as primary school age, can be involved in their educational planning. It is very important that older learners participate in the IEP development and implementation. Learners can play a role in providing information that will assist the teams in understanding them. They can provide information on:

- their interests;
- their preferences;
- their learning styles and needs;
- the strategies and activities that enhance their learning;
- what makes learning difficult for them; and
- things that they like and do not like, etc.

Learners are not just a source of information; they are central in the whole IEP process. They have a role of taking ownership of the IEP process and making sure they benefit from it.

Parents/caregivers

Parents/caregivers know their children more than any other team member and can therefore provide valuable information. This includes information about their children's:

- interests;
- motivations;
- strengths; and

- learning styles and needs.

They can provide other information that helps the team to avoid potential problems with their children.

Parents/caregivers can provide information that is not often observed at school. They have the role of supporting their children's attempts to reach specific learning outcomes by reinforcing at home some of the activities carried out at school. They can also give feedback on their children's progress and advocate for their children.

Teachers

Teachers have the legal responsibility of teaching all learners and helping them achieve the curricula outcomes. In the IEP process they play a role in providing information about the learner. They can provide information about the learner's:

- strengths/needs;
- interests;
- specific difficulties in different learning areas; and
- teaching and assessment strategies that the learner responds well to, etc.

Teachers also provide details about previous educational interventions and how the learner responded to these interventions. From teachers the team can get information on how the learner performs in relation to other learners of the same age/class,³ and school records on the learner's educational history. Teachers play a role in implementing and reviewing the IEP. They have a role of endorsing IEP decisions, because eventually they are the ones who have a legal responsibility of teaching, assessing, and reporting on the learner's progress.

IEP co-ordinator

The IEP co-ordinator (for example, the school inclusive education co-ordinator, IECo), or whatever the person is called in each context) oversees the work of the team. Their role includes:

- co-ordinating the development of the IEP;

³ However, it must be stressed that an IEP is **not** about making all learners do and achieve the same things at the same speeds, so comparisons of one learner with another should not be a key part of the IEP process.

- co-ordinating the ongoing IEP implementation, review, and revision;
- ensuring that a process to monitor learner progress and achievement is established;
- facilitating group decision-making;
- co-ordinating communication among team members;
- organising, chairing, and facilitating learner-specific planning meetings;
- managing the meeting process such as:
 - preparing and distributing a written and timed agenda prior to the meeting;
 - ensuring meeting minutes are kept and distributed to team members on time;
 - documenting and distributing revisions of the IEP;
 - initiating and maintaining contact with external agencies, as required.

Other professionals

Other professionals can form part of the IEP team, depending on the nature of support required by the learner and the availability of such services in the context. Other professionals might include:

<ul style="list-style-type: none"> • speech and language therapist; • psychologist; • physiotherapist; • special needs teacher; • social worker; 	<ul style="list-style-type: none"> • special educator; • medical staff; • remedial therapist; • learning support teacher; • occupational therapist.
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These professionals can play a role in assessing and making available additional information on the learner. The information provided by such professionals may include information about:

- the learner's medical needs;
- physical or sensory development;
- cognitive functioning;
- emotional and/or behavioural development;
- speech and language;

- communication; and
- hearing and/or vision.

They play a role in providing additional support to the learner to help them achieve the IEP goals and objectives.

However, a cautionary note needs to be made at this point. In some instances, there is tendency to over-rely on these professions in driving the IEP process. Very often reliance on these professionals has created a belief among teachers that, as teachers, they are not capable of facilitating the process of providing the support their learners require. Teachers often view these professional as experts and as the only people who can drive the process and provide specialised support.

When this happens, teachers become disempowered and forget that, in fact, they are the professionals who have the skills and knowledge as well as legal responsibility to teach learners the knowledge and skills required by the curriculum. The other professionals play a *supportive role* to teachers. Therefore, teachers have to take a leading role in any process that ensures learners achieve the curriculum outcomes; this includes the developing and implementing of an IEP.

As earlier noted, the way these team members interact contributes to the effectiveness of the IEP development and implementation. Hierarchies of power and decision-making, as well as cultural, educational and social differences can create some tension that can make the team less effective.

Very often the team members perceived as less important than others will feel excluded and their contributions in the IEP process will be minimal, if any. This group includes parents/caregivers, learners, teachers (perceived as lower than professionals who are the ‘experts’), and women in relation to men. Age, racial, linguistic, and cultural differences also often interfere in the IEP process if not managed properly.

Therefore, team members should make a conscious effort to create an environment where every team member is sensitive to such difference and tries to make others feel comfortable, included, welcome and understood. There needs to be an environment where all team members can participate meaningfully and feel their contribution is valued.

Resource 5.16: Collaboration

Interpretation 1

“Collaboration is a structured process where two or more people work towards a common goal by sharing the knowledge.”

(Participant in a previous workshop)

Interpretation 2

Collaborative work is a shared problem-solving strategy where collaborating partners agree to work as equals. The key characteristics of collaborating work are that the role players:

- have different expertise;
- share responsibilities;
- share outcomes of the intervention whether positive or negative;
- respect each other;
- welcome and use differences to come up with solutions; and
- consult each other for solutions.

(Taken from a South African training manual)

Interpretation 3

“Collaboration: in inclusive education we should view parents and students as important and necessary partners who need to be listened to.”

(Participant from a workshop in Swaziland)

Our interpretation of the meaning of collaboration

Resource 5.17: Key principles for collaboration

Activity A

You are a teacher who is working as part of a team to build/open a new early childhood education centre in your community. In your team are some important officials from the Ministry of Education.

You have a thorough knowledge of the community, and the community respects you.

The officials have a very high level of technical knowledge about early childhood education but are unfamiliar with the local context.

- 1) What might be some of the challenges to collaboration in this situation?**

- 2) What are some of the key principles that will make working with these important officials effective?**

Write them below and explain:

E.g., ***trust*** – each group can acknowledge the expertise of the other and trust that each group has the best interests of the community in mind.

Activity B

How can each of the principles be implemented in practice, during the IEP development and implementation process by the IEP team members?

Principle	How it can be applied in an IEP process
Respect	e.g., Using input from parents/caregivers no matter how simple it may be e.g., Listening and input from those whose cultural beliefs do not align with ours
Trusting and welcoming	
Responsibility	
Accountability	
Accessibility	
Transparency	

Add other principles on another sheet of paper if you want to!

Resource 5.18: Key principles for effective collaboration

Respect

Applied in the IEP process this could mean:

- Acknowledging, accepting, embracing, and valuing differences;
- respecting the differing opinions of others, irrespective of who they are;
- showing consideration of differences and diversity;
- respecting and accepting cultures and backgrounds different from your own;
- not judging others because of their differences; and
- team culture that shows respect and acceptance.

Trust

Applied in the IEP process this could mean:

- trusting other people's judgment and decision;
- believing in others;
- having faith in the IEP process and in all the collaborating partners;
- the IEP team creating an atmosphere and feeling of being able to rely on each other; and
- trusting and having high expectations of the process and from team members.

Accessible and transparent process

This could mean:

- creating a team culture where the reasons for everything being done are communicated clearly;
- creating a working environment that is physically and emotionally accessible;
- using communication methods that are sensitive to different cultures and are accessible to all; and

- team members creating an inviting and accessible atmosphere around them.

Responsibility and accountability

This may entail creating a working culture among team members where each team member takes her/his responsibility seriously, is reliable and diligent; a working culture where each member shows pride in their contributions.

These principles should not merely be mentioned for the sake of being mentioned. Their use can play a critical role especially in creating a welcoming environment for parents/caregivers, learners, and for people with different cultural, ethnic or linguistic backgrounds.

Resource 5.19: IEP meetings

Reasons for holding IEP meetings

There are several reasons for having an IEP meeting. An IEP meeting is held:

- for the initial development of the IEP by the IEP team;
- to review the learner's progress, and this usually happens once a year;
- when there are changes that require the team to meet (for example, if the learner is moving or transferring to a different school);
- when there are some concerns that need to be discussed by the team; and
- to discuss the learner's transition to the next level of education, training, or work.

A parent/caregiver can also request a meeting of the IEP team.

Quality leadership of IEP meetings, as well as the nature of interaction among team members, contributes to the effectiveness of an IEP. This includes the way the meeting is planned and conducted and the follow-up after the meeting.

Planning an IEP meeting

If you want a meeting or an event to be successful you have to plan and manage it accordingly. Like any other meeting or event, an IEP meeting needs time for planning.

Planning includes:

- selecting the date, location and time and checking these with all team members;
- inviting relevant team members. It will help if you include a short explanation of the IEP with the invitation for parents/caregivers. For learners, depending on their age, you may have to sit and explain to them what will happen at the meeting; and
- preparing documents for the meeting. This could include current information on the learner with current levels of performance, and an agenda.

You could put these documents in a folder.

Make sure the sitting arrangements do not create an intimidating environment or feelings of isolation. You could do this by removing barriers between team members; ***a circle seating arrangement communicates equality.***

You may pre-arrange the seating by placing document folders together with name labels where you want each team members to sit. Make sure you use name labels that everyone can see so that people can refer to others by name depending on what has been agreed on.

Prepare the meeting venue

The venue should be:

- easily accessible to all;
- large enough to accommodate all team members;
- well ventilated and comfortable;
- adequately lit;
- free of clutter;
- clean; and
- and there should be water for drinking.

Make arrangements to meet parents/caregivers and make them feel welcome. It may be advisable to wait until the parents/caregivers arrive before seating everyone, as they may feel intimidated if they walk into the room and find everyone is sitting. Make sure there is adequate stationery including paper, pens, and flipchart paper where you can write key decisions for everyone to see, to ensure a transparent process.

Leading the meeting

The IEP co-ordinator (for example, the school inclusive education co-ordinator, (IECo)), should set a positive tone and direction by welcoming everyone and thanking every member for making time for the meeting. The rest of the agenda can be:

- explaining the purpose of the meeting and the expected meeting outcomes;
- outlining the time allocated for the meeting;

- explaining the meeting rules, e.g., not taking phone calls, how to reach agreement by consensus, etc.;
- introducing and discussing each agenda item;
- encouraging collaboration and consensus;
- facilitating problem-solving;
- making sure that discussion and required follow-up are recorded;
- being open and encouraging discussion;
- remaining calm and maintaining harmony if there are disagreements between members;
- reminding team members about the shared goals and appropriate meeting behaviours;
- not using one's leadership role to dominate the meeting;
- making sure all role players especially the parents/caregivers are actively involved not just as observers but as decision-makers and information sources;
- ensuring that there is equity among team members; and
- encouraging team members to convey information in an easily understood manner.

Ending the meeting

When ending the meeting, it is important to bring proper closure to the decisions made by:

- summarising decisions and follow-ups;
- making sure that every team member understands their responsibilities;
- encouraging the parents/caregivers to look at the IEP decisions upon receiving the documents and call or visit the school at any time if they have any questions;
- identifying and recording items for the agenda of the next meeting; and
- setting the date, time, and location of the next meeting.

End the meeting by thanking the parents/caregivers and team members for making time for the meeting and for the contributions they have made.

After the meeting

The IEP co-ordinator, such as the school IECo, should:

- make sure that a record of the meeting and decisions made is prepared and distributed to all team members;
- monitor implementation of decisions;
- stay in touch with team members;
- facilitate communication between team members; and
- ensure records of the IEP process are well kept.

Resource 5.20: Script outline for role-play

Do you remember Thandiwe's case study from [Resource 5.14](#)? She is a 16-year-old female learner. The IEP team is meeting for the first time to review her progress.

Meeting venue and setting

The meeting is held in an empty storeroom next to the school's sports ground. There is a lot of noise. There are chairs arranged around a rectangular table. The place is dusty because it is hardly ever used.

IEP co-ordinator (such as the school inclusive education co-ordinator (IECo))

You are the school's identified person who coordinates the IEP process in the school. Your role in the IEP meeting is to chair and facilitate an effective IEP meeting. After the meeting you have to take your son to see a doctor as he is not well. You have about 30 minutes for the meeting. You are a bit anxious about your son and it shows in the way you facilitate the meeting, but at the same time you want the best for Thandiwe.

You do the following:

- You don't take note that the venue is very noisy and it is difficult to follow the meeting proceedings.
- You don't take note that most of the professional staff arrive early and are sitting on their own, while Thandiwe and her mother are sitting on a different side of the table.
- You begin the meeting by just getting to the point without giving everyone a copy of the IEP and getting people to introduce themselves.
- You use big/complicated words very often during the meeting.
- You state the purpose of the meeting and request feedback from the teacher and curriculum director/director of studies.
- Once the feedback is given you ask them what the way forward is.
- You ask the mother if the way forward is fine with her.
- You completely ignore Thandiwe until she cries out in anger and frustration.
- You ask the teacher to calm her and continue to end the meeting.

- The whole meeting takes about 20 minutes.

Teacher

You report that Thandiwe is doing well with the reading comprehension. She is able to read a short paragraph and correctly answers all 3 questions. You have also noted that her vocabulary is improving. You mention that Thandiwe's mother is very quiet today and looks a bit upset. You make a comment about it and acknowledge the support she and her family give to you as the teacher and to Thandiwe.

After-school activities coordinator

You report that there is a bit of improvement in Thandiwe's social interaction, as she is able to take turns when she is communicating with a peer. However, you note that during these interactions she does not ask questions, she only conveys information. You have tried hard to get her to ask questions but you are not succeeding. You are not sure how to get her to ask questions. You ask the mother if she observes the same at home and if so, how she deals with it. She shares with you some of the things that she does and you thank her and promise to include these strategies in your work with Thandiwe.

Thandiwe's mother

At the beginning of the meeting you feel completely excluded from this meeting. The sitting arrangement makes you feel physically unwelcomed. The meeting room is too noisy and you can barely hear what is being said. What is worse is that the words the principal uses are too difficult. She/he does not seem to be interested in your input. Your response to this situation is to remain quiet and just listen to what the others are saying and only respond to questions. Your mood changes a bit when the teacher and the after-school activities coordinator acknowledge your input to your child's IEP implementation process.

Thandiwe

You watch everyone talking about you. You have a lot to say about yourself and you are not given a chance. You have been holding your mother's hand while all of this is happening. You feel you cannot take it anymore and start squeezing your mother's hand and scream for attention.

Resource 5.21: Role-play observation checklists

Checklist for collaboration

Observe the role-play and check if the following principles were implemented or not implemented during the IEP meeting role-play. Comment on how it was implemented or not implemented.

Principle	Yes / no	Comment
Respect		
Trusting and welcoming		
Responsibility		
Accountability		
Accessibility		
Transparency		

IEP meeting process checklist

Meeting process	Comment
Meeting venue <ul style="list-style-type: none"> Physical appearance The setting The sitting arrangement 	
Opening of meeting <ul style="list-style-type: none"> Welcome Introduction Stating purpose of meeting Reviewing agenda and making changes as required Selecting person who will take written record of the meeting Encouraging teachers to contribute openly and respectfully 	
Move through the agenda <ul style="list-style-type: none"> Discussing each agenda item Encouraging collaboration and consensus Facilitating problem-solving Recording the discussion and required follow-up 	
Closing meeting <ul style="list-style-type: none"> Summarising decisions and follow-ups Identifying and recording items for the agenda of the next meeting Setting date, time, and location of meeting Thanking the teachers for their contribution 	

Resource 5.22: Encouraging learner participation in the IEP process

Introduction

Learners' meaningful participation does not only contribute to the success of the IEP process, but it also helps the learners develop skills that will assist them to become independent and productive adults. It helps them become adults who can communicate their needs, wants, strengths and challenges, set own goals, make choices, problem-solve and work with others. Learners' participation in the IEP process also promotes ownership of the IEP. Therefore, it is important that all learners of all grades and abilities participate in the IEP process. Participation should not only be limited to older learners and those without intellectual disabilities.

However, the nature of learner participation in the IEP process will depend on several factors, including age, previous experience, communication abilities, disability-related issues, and socialisation. For example, a 7-year-old learner who comes from a home where he is not given an opportunity to express her/his opinion and discuss with adults, a learner who has communication difficulties, and a 13-year-old learner with good communication skills who has had an IEP for the past 3 years cannot all be expected to participate in a similar manner in the IEP process. Learner participation in the IEP *is a process* and cannot just happen without some form of support.

Schools and parents/caregivers have a responsibility to help learners develop skills that they can use to participate meaningfully in the IEP process. They also have a responsibility to create an environment that encourages learner participation. This handout offers some suggestions that teachers and parents/caregivers can use to encourage learner participation in the IEP process.

Learners can be assisted in providing information about the following issues. This information is used by the team to better understand the learner's strength and challenges.

This information includes:

- how they feel about having an IEP;
- likes and dislikes;

- what makes them sad and happy;
- what they are good at and what they find challenging;
- their dreams;
- their expectations; and
- their learning preferences.

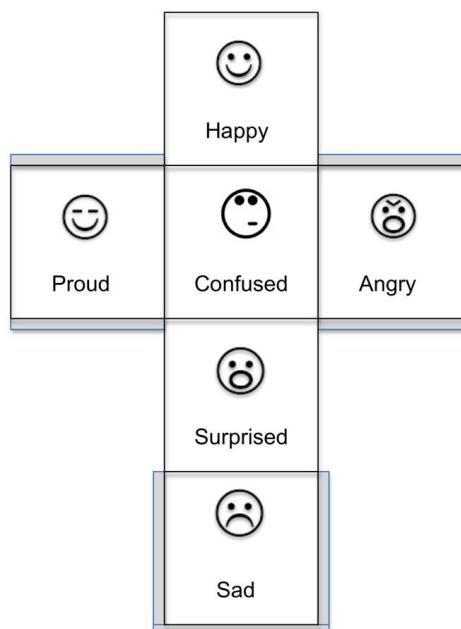
Strategies for helping learners to participate and have a voice

Learners should be assisted in helping the team set their learning goals. Various strategies can be used to help learners share this information depending on the learners' age, previous exposure, socialisation, disability, grade level and communication skills. These strategies include the use of games, pictures, verbal communication, photos, checklists, choice-making activities, drawing, writing, etc.

The 'feeling dice' game

One game that can be used is the 'feeling die'. This die can be used by learners to communicate how they feel, which actions evoke certain feelings, what makes them sad and happy, etc. It can also be used to help learners identify and communicate their learning strengths and challenges.

A six-sided die, each side representing an emotion, is created like the example below.



Any emotion can be depicted on the die. You could have several dice available with different sets of emotions depicted. However, there should be a balance between negative and positive emotions. Learners can use the various pictures on the die to indicate their feelings about different events and activities related to their learning and to the IEP process.

Images

Another strategy that can be used to help learners communicate their motivations and dreams are pictures and photographs. Different pictures showing people of different professions can be shown to the learner and discussed with them. After discussion of what the different professions do, the learner can be asked what he/she aspires to be. From this discussion learners can share their likes, dislikes, strength, and challenges through the teacher/adult asking them questions such as:

- Why do you want to be in profession X and not Y?
- What are good things that profession X does that you are also good at?
- What are some of the things that can make it difficult for you to be profession Y?
- In what ways do you think we can all help you to become a [profession X]?

Familiarity with the process

Many people find it difficult to participate productively in formal meetings and need to be helped. This is no different for learners involved in an IEP process. Learners need help with different aspects of the IEP meeting process. They need help with understanding the meeting process. This includes explaining, in a way that will help them understand, why they should be part of this meeting, the purpose of the meeting, who will attend, why they are attending, what will happen and what is expected of the learner. Again, how this information is communicated to learners depends on the various factors that have already been mentioned. Teachers can communicate this information using a variety of strategies. These include pictures, verbal communication, photos, drawing, writing, videos, etc.

Learners may need assistance in understanding the sequence of the meeting, words that will be used at the meeting and their meanings. A sequence of drawings could be used to facilitate this. In a sequence drawing, pictures of the different parts of the IEP meeting process are drawn in order to show the learner visually what will happen in such a meeting, including what they (the

learner) will do and the meeting process and etiquette. It is important that this process is discussed with the learner (i.e., do not just leave them to look at the pictures by themselves).

Chance to prepare

Learners should be helped to prepare what they want to say in the best way that suits them. They should be given an opportunity to practise. This can be done through role-play with others.

Allow flexible participation modes

Learners' participation at the IEP meeting should be seen in a continuum, as not all learners are the same. As earlier noted, their participation in the IEP meeting will vary depending on various factors. One learner can feel confident to participate verbally throughout the meeting process. Another learner may just feel comfortable introducing speakers. Another learner may feel comfortable only communicating his or her IEP goal. All learners should be encouraged to participate in the best way they can.

Direct interaction

IEP team members should make an effort to interact directly with the learner in a way that encourages her or his participation. For example, instead of talking to the learner through a parent/caregiver or teacher, team members should talk directly to the learner. For example, instead of looking at the teacher or the mother and asking, "Does [child's name] like sport?" they should interact directly with the learner and ask, "Do you like sport?"

Effective follow-up

After the meeting the teacher can meet with the learner to discuss and reflect on what happened at the meeting. The teacher can find out from the learner how they feel about the meeting process and the decisions made at the meeting, what they liked and did not like. The learner should be encouraged to monitor his/her own performance. Simple progress charts (both written and in a drawing format) with achievable performance benchmarks and created by the learner can be used to encourage them to monitor their performance.

Parental support

In addition to the role played by schools, parents/caregivers should play a role in helping their children participate in the IEP process. The way

parents/caregivers interact with their children can indirectly build their confidence, assertiveness, and collaborative approach to issues – all required for participation in the IEP process.

Parents/caregivers should help by:

- modelling willingness to consult and work with others;
- modelling self-worth and assertiveness;
- modelling respect for others, listening to opinions of others and taking responsibility and accountability for ones' actions;
- encouraging their children to have a say and opinion and to challenge opinions;
- providing opportunities at home where children can make decisions, choices and problem-solve;
- praising their children not only when they have done good work but also if they have put effort into what they are doing;
- discussing with the children their dreams and aspirations; and
- instilling in their children that weaknesses are steps toward growth and should be viewed in a positive manner, not as failures.

Parents/caregivers can also directly help their children participate in the IEP process. Some of the things that parents/caregivers can do to help their children participate actively in the IEP process include:

- discussing with their children about their school interaction in general;
- discussing with their children about their learning strengths, challenges, and how they plan to deal with the challenges;
- allowing their children to be part of meetings where their performance is discussed and modelling good meeting behaviour at these meetings. This will give them an opportunity to observe meeting processes and manners;
- helping their children prepare their learning goals;
- discussing and monitoring their performance;
- creating opportunities to reinforce what is done at school;
- helping their children prepare for the IEP meeting by helping them rehearse what they want to say at the meeting;
- helping their children develop meeting manners/etiquette; and

- discussing and reflecting on IEP meetings process and decisions.

Ideas from other places

Ontario Ministry of Education (2004) *The Individual Education Plan (IEP): A Resource Guide* makes the following recommendation to teachers about improving learner participating in the IEP process:

- “Children can be encouraged to write their targets on or attach targets to an appropriate book or folder.
- Targets can be shared with children using visual strategies such as symbols or photographs.
- Children can have pre-printed target monitoring forms attached to a subject exercise book – they can then record their responses to targets set.
- Children can have a time set to discuss their progress with staff.
- Older children can be invited to all or part of a review meeting to discuss their progress and give feedback.
- Where peer support is part of the IEP, children providing support can be invited to all or part of a review meeting.”

The New Mexico State Department of Education, *Technical Assistant Manual: Developing Quality IEPs*, proposes the following activities that can be done by educators and/or parents/caregivers to help a learner prepare for his or her IEP meeting:

- Spend time allowing the learner to think about what he or she wants from education.
- Fully explain the purpose of the IEP meeting and who will be present.
- Review the parts of the IEP and what each one means.
- Share information that others will have, such as the past IEP, and be sure the learner understands what it says.
- Share with the learner the kinds of conversations that might occur at the IEP meeting.
- Have the learner(s) role-play an IEP meeting to practice.

Some parents/caregivers may not be aware of the important role they can play in helping their children to participate in the IEP process. It is therefore the school's responsibility to bring this to parents'/caregivers' attention and help them develop the necessary knowledge and skills that they can use to assist the learners. Help provided to parents/caregivers by schools can be given indirectly, by referring them to organisations or agencies that can provide the necessary support; and directly, by sharing with parents/caregivers the required knowledge and skills they need to assist their child.

Resource 5.23: Improving parents'/caregivers' participation in the IEP process

The Manitoba Education 2010: Student Specific planning: A Handbook for Developing and Implementing Individual Education Plans, makes the following suggestions to parents/caregivers on how they can improve their participation in the IEP meeting:

“Parents are valuable members of this process. You have the right to participate in the individual education planning process for your child. As a parent, you provide a unique understanding of your child’s past experience and his or her interests, goals, and aspirations. The work you can do with your child at home is often important in meeting the outcomes identified in the individual education plan (IEP).

As a parent, you can take part in the student-specific planning process by having regular contact with the school, taking an active role in the decisions made for your child, and asking about the services and resources available.

Before going to a student-specific planning meeting:

- You may want to ask the teacher for a copy of the meeting agenda.
- Ask how your child may be a part of the process of planning the IEP.
- Reflect on and write down the thoughts and questions you want to talk about in the meeting.
- Think about your goals and hopes for your child.
- Think about the concerns you would like to see addressed.
- Consider inviting someone to assist you with this process (a friend or family member)—if you invite someone, inform the teacher.

At the IEP planning meeting:

- Feel free to make it clear how long you can stay for the meeting.
- Provide information about your child and how he or she learns and behaves outside school.
- Ask questions if anything is unclear.
- Ask how you can help work on some of the outcomes of the IEP at home.

After meetings:

- You can help by keeping in touch with the teacher(s) and working on the outcomes of the IEP at home.
- You can help by telling the teacher(s) of any change at home that may affect your child at school”.

The Manitoba Education School Programs Division also makes the following proposal to schools on how they can promote parent/caregiver participation in the IEP process:

“Parents are more likely to participate actively in student-specific planning when they understand the process and are equal team members. The in-school team can encourage the participation of parents by:

- Providing a comfortable, welcoming, non-intimidating environment.
- Establishing and maintaining communication.
- Valuing parents’ contributions and priorities.
- Arranging meetings when it is possible for parents to participate.
- Discussing the purpose of each meeting and providing an agenda.
- Avoiding confusing language and explaining all terms and data clearly”.

The Bright Futures tool for families makes the following suggestion to schools on how they can encourage parents’/caregivers’ participation in the IEP process:

(See www.brightfutures.org/mentalhealth/pdf/families/mc/iep.pdf)

“Parents have important knowledge and information to share about their child and can give vital support at home to their child in achieving their targets. It is important to establish what parents see as priorities for their child. It may be appropriate to include out of school targets that can support the achievement of outcomes. Communication is vital – it should be:

- Non-threatening and jargon-free.
- Clear about how parents can help.
- Encouraging and promising, emphasising any extra attention that will be given to their child.

Consideration needs to be given to parents who may have difficulty understanding written information, because of literacy difficulties or because English is their second language.

Parents can be supported by receiving basic information on what an IEP is prior to visiting school for a review meeting or parents' event. This will give parents more confidence and make them better able to understand the process.

Make them feel included.

Emphasise that their contribution is valued.

Parents should be invited to attend and contribute to more formal reviews.

Additionally, informal comments from parents should be recorded against targets on the IEP.

These comments may come from a variety of sources, e.g., telephone conversations, home school day, brief after school meetings.”

Below are recommendations from reviewed literature for strengthening the IEP process and promoting a positive experience for all stakeholders; taken from J.W. Reiman, L. Beck, T. Coppola, and A. Engiles (2010) *Parents' Experiences with the IEP Process Considerations for Improving Practice*, J.D. Center for Appropriate Dispute Resolution in Special Education (CADRE) Eugene, Oregon

“For Schools and Educators

Esquivel, Ryan, and Bonner (2008) recommend that professionals improve parents' experiences in school-based team meetings by sharing their knowledge of the child as an individual with unique interests, strengths, and weaknesses and avoid discussing the child in ways that suggest he/she is defined by her/his disabilities. The authors further suggest that schools apply creative solutions to problems and remain open to alternatives when current solutions aren't sufficient.

Fish (2006) asked parents what school districts could do to improve IEP meetings. Answers included:

- Making the meetings more democratic so that parents feel they are equal contributors.
- Being open to parental input regarding placement, discipline, and instruction.
- Being friendly.
- Valuing and listening to parental input.
- Being flexible and more willing to adjust to student needs; and, educating parents about the IEP process.

Fish's 2008 study were generally satisfied with their child's IEP meetings, but they still believed that educators could improve the process. Their suggestions included:

- Allowing sufficient time for the meetings.
- Creating a welcoming atmosphere.
- Encouraging parents to bring an advocate familiar with the IEP process.
- Using common terms instead of jargon to lessen confusion.
- Refraining from completing IEP forms in advance of parental input.
- Involving parents in the writing of goals and objectives.
- Providing parents with a copy of the IEP objectives a few weeks before the meeting to allow time for review and preparation of questions.

Simon (2006) suggests that educators provide parents with IEP forms in advance and ask them to think about issues to be discussed at the meeting. This can enhance parents' sense of ownership of the process as team members and foster good communication with them during and after the IEP meeting. Soliciting parents' feedback on their child's progress toward reaching her/his goals and welcoming their post-meeting feedback can help to identify points of weakness in the implementation of the IEP, which can then be addressed through professional development or in-service opportunities as needed.

Stoner et al. (2005) developed recommendations for professionals based on the findings of their study that include:

- Preparing parents for the IEP meeting by informing them about procedures, their legal rights, and related services.

- Being flexible in discussions about location and duration of IEP meetings (to equalise the roles of team members and reduce the power of educators and other professionals).
- Strengthening trust by listening to parents, welcoming their input and following through on promises.

For Parents

Fish (2006) asked teachers what parents can do to improve the IEP process. Responses included:

- Becoming knowledgeable about special education law and the parameters of the IEP process.
- Taking the initiative to educate themselves about special education issues.
- Being persistent in requesting needed services for their children.

For Culturally and Linguistically Diverse Families

Cho and Gannotti (2005) reported that all of the mothers interviewed for their study agreed that their limited English ability was not a barrier ***as long as professionals were willing to take the time to communicate with them by listening carefully and rephrasing the parent's words*** in correct English to clarify and avoid misunderstandings.

They also expressed the need for ***better translation and interpretation services*** and for more support and information from professionals.

The authors stated that disagreements with education professionals can be a major source of stress for Korean parents because ***respect for authority is highly valued in their culture and conflict with authorities is viewed negatively***. Consequently, having to make requests repeatedly is very discouraging and stressful for these mothers.

The authors also recommended connecting parents with community, service, or parent-to-parent groups that target the needs of Asian/Korean families for support and information immediately after diagnosis.

Lo (2008) identified several ways that professionals can improve the IEP process for parents, including:

- Meeting with interpreters before each IEP meeting to provide them with the terminology that will be used in the meeting.
- Speaking to parents in short sentences and pausing regularly to provide the time needed for note taking and interpretation.
- Working with local community organizations to develop training programs in the parents' native language to educate families on how best to prepare for and be involved in the IEP process.

Lo (2009) made additional recommendations for improving the IEP process for CLD parents, including:

- Providing parents with information about their child's disability in their primary language.
- Having a second reader proofread translated documents before sending them to families.
- Taking time to determine the dialects that the families speak.
- Locating qualified interpreters who speak the same dialects. It is important to find out if translators and interpreters have expertise in special education and, if not, to provide the common terms that will be used during the meeting and instruction on how to provide interpretation during the meeting.
- Educators supplement written progress reports by dedicating a portion of the IEP meeting to teaching strategies that families can use to instruct their children at home. Children's skills can be reinforced when the same methods are used by both teachers and parents.
- The need for schools to identify and collaborate with community organizations to provide parent education related to the special education process".

The National Center for Education in Maternal and Child Health and Georgetown University provides a guideline on how parents can improve their participation in the IEP meeting. (Individualized Education Program (IEP) Meeting Checklist; 2003: National Center for Education in Maternal and Child Health and Georgetown University.)

Resource 5.24: Thandiwe and the ‘feeling dice’ game

Remember Thandiwe is a 16-year-old female learner in the role-play. Remember she has social communication difficulties. She finds it difficult to take turns when communicating.

Let us pretend Thandiwe is a little bit younger, maybe 9 years old. The IEP team met for the first time to review her progress. At that meeting, although Thandiwe was prepared and wanted to contribute, she was not given a chance to make her contribution. Her reaction to the situation at the meeting was this: she squeezed her mother’s hand and screamed.

How could you use the “feeling dice game” to help Thandiwe express how she felt at the meeting and the reason why she felt like that?

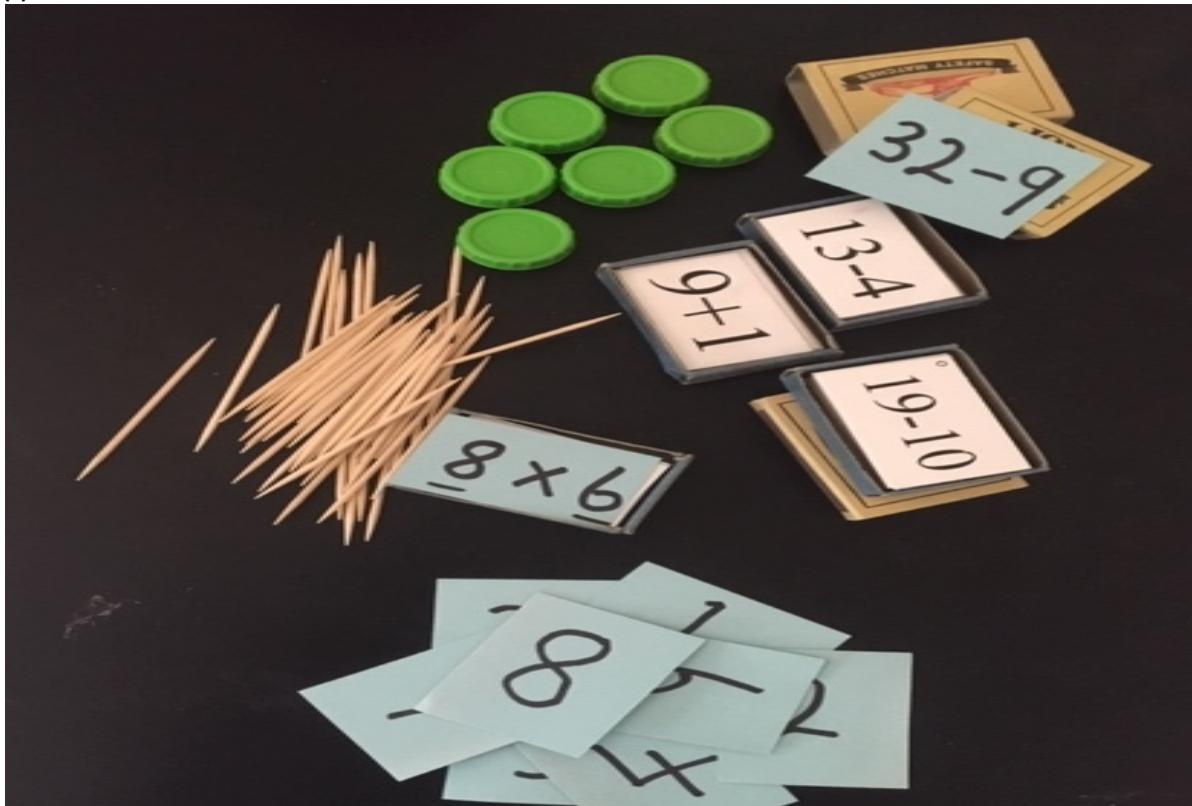
You will be asked to demonstrate how you could use the feeling dice game.

Resource 5.25: Easily adaptable teaching and learning aids – examples

Note for trainers:

Make your own sets to demonstrate in your training together with your own ideas for teaching and learning aids.

(i)



Matchbox Mathematics sets are easily made, stored and adapted. They can be used for all levels of Mathematics and are made from empty match boxes, old card, bottle tops and toothpicks for counters.

[Image description: The picture shows empty match boxes, old card cut into squares with numbers written on them, bottle tops and toothpicks.]

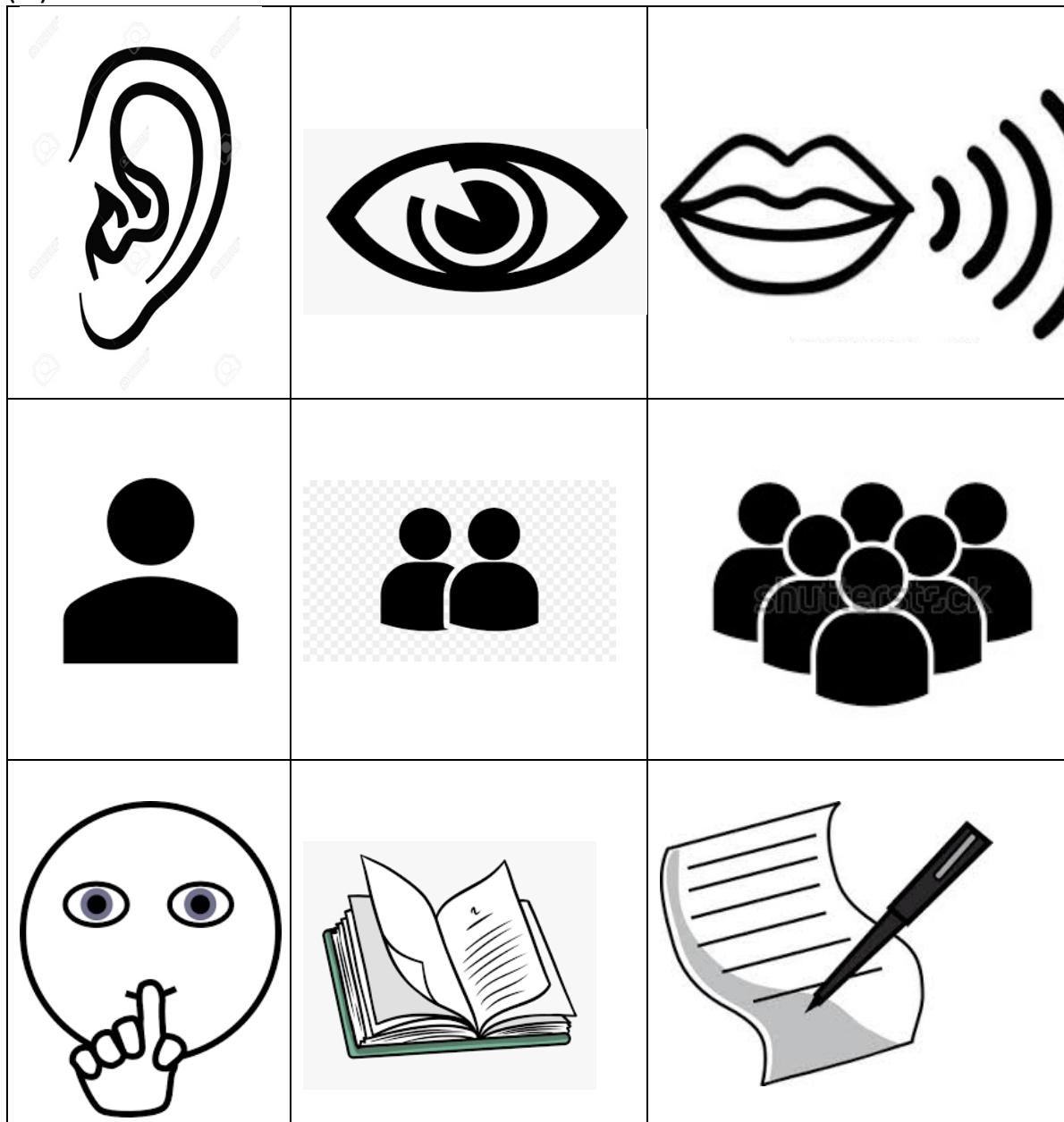
(ii)



An adapted exercise book for learners who do not see very well. Teachers can use a black marker pen to change the page to wider-spaced, easier to see lines. The space between the lines would depend on the findings from an individual learner's functional assessment.

[Image description: The picture shows an exercise book with faint ruled lines on the left-hand page, and thicker darker lines, spaced further apart, on the right-hand page.]

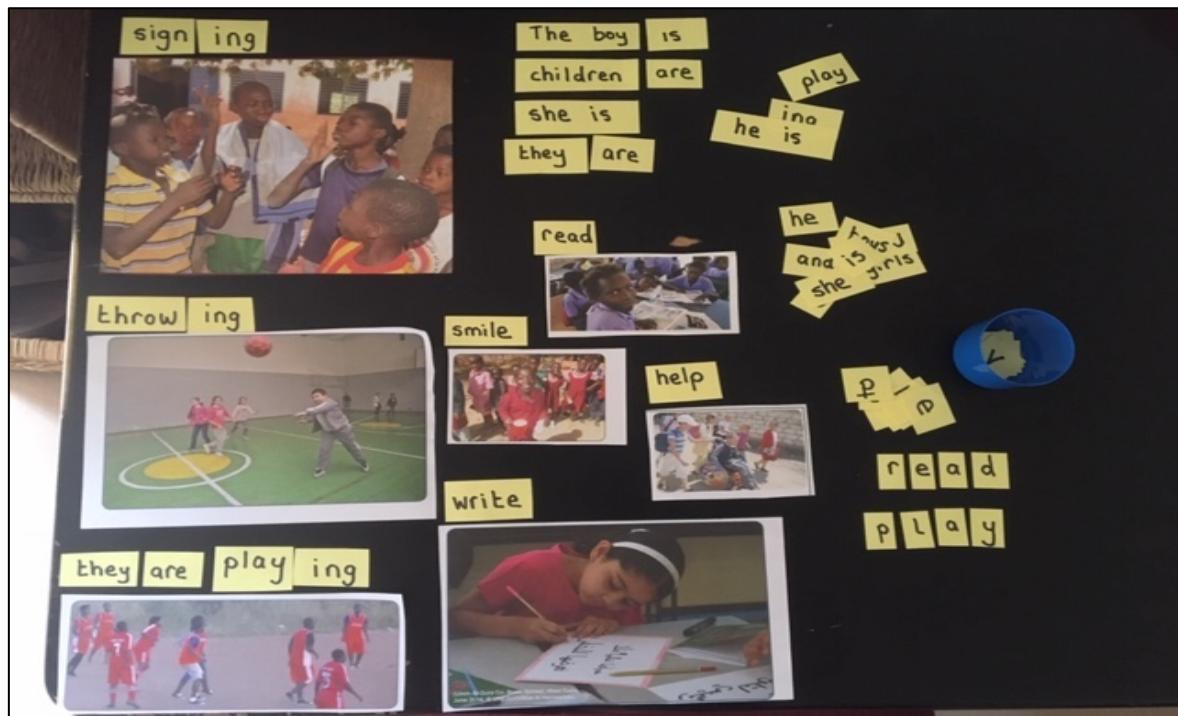
(iii)



Examples of images to use in the classroom – easy to draw or photocopy and display on the wall. The images tell learners to listen, look, speak, work individually, in pairs, in groups, to be quiet, to read or to write. Inclusive teaching and learning aids for good classroom management – for all learners and specifically for learners who do not hear well.

[Image description: The picture shows nine smaller pictures of an ear, an eye, a mouth, one person, two people, six people, a face with a finger against the mouth, an exercise book, and a ruled page of an exercise book and a pen writing on it.]

(iv)



A teaching and learning aid for a language lesson – made from waste materials and old magazines. Used for comprehension with pictures, building words, building sentences, building action words (+ing). Easily adapted for all abilities, allowing learners to investigate and problem solve.

[Image description: There are seven photographs of learners engaged in activities such as writing, signing and playing ball games. Next to the photos are words and letters on yellow card. Some of the words and letters have been made into sentences to describe the pictures, e.g., 'they are playing'.]



Using old card, magazines and clothes pegs. Some learners may be able to identify objects, some may be able to build the words and then write them. Others may be able to write complete sentences about what they see in the picture.

[Image description: The picture has four pieces of blue card with pictures stuck on them, and one piece of blue card on which is written: 'What do you see?'. There are pieces of yellow card and clothes pegs, each with a different letter written on them. Some of the pegs have been made into words to describe the pictures, e.g., 'b.o.o.k'.]

Resource 5.26: Case studies for group-work

Note for trainers:

Photocopy these case studies and stick them separately onto strong card. Use them as training aids. You can also write your own case studies. Refer to the supplementary module on **Including Learners with Additional Needs** to help you think through potential case studies.

Mulenga is 12 years old and was born with Cerebral Palsy. He has delays in speech development, has difficulty speaking, has learning difficulties and has problems with fine motor skills, such as buttoning clothes, tying shoelaces or picking up small objects.

In addition, Mulenga has difficulty sitting up straight without support (a local community-based inclusive development officer has now made him a special chair) and difficulty controlling the muscles in his hands, which means he cannot grip small objects like a pen. He does not speak clearly but makes noises.

Mulenga has a very supportive and loving family who communicate with him very well. His mother is a teacher. He has been in the 'Special Class' for the past 3 years but has made very little progress as the teacher did not know how to teach him. In line with the new education policy the Special Class will now close and Mulenga will be included in mainstream classes.

Rodgers has learning and developmental impairments. He is 11 years old and has just moved to live with relatives. He has just started to go to school for the first time having previously attended a residential institution for boys who have intellectual impairments. He cannot read or write. He is very quiet and shy with limited social skills. He appears to be very unhappy at school – some days he does not stay but goes home during the morning break. Rodgers loves animals and frequently goes to the forest to watch the birds and try to find other animals. His other interest is football although he only ever plays alone.

Tina is 9 years old and has just moved to a new area and new school – she previously attended a mainstream Primary School in another part of the country for one year. She was born with Foetal Alcohol Syndrome.

Tina is slow to process information and does not understand long, more complex instructions. She is often hyperactive and finds it difficult to concentrate for even a short amount of time. She cannot read or write but can recognise individual letters and smaller single-digit numbers. She understands a picture if it is in her own context, for example, showing something in a school, a village, or a farm. She can explain the picture content and answer simple questions verbally. Physically, Tina looks ‘different’ to other learners in her class – she is very short for her age with a smaller than usual head and very small wide-set eyes. Since her mother passed away Tina has lived with her aunt and five other children.

Misozi was noticed by an education inspector while the inspector was visiting a village school. She was living in the corral with the goats and has never been to school. She appears to have complex needs, rocking from side to side and making unclear sounds. She has a beautiful smile and can understand and look happy in response to kind words. Her grandmother provides food for her and is her only relative – she did not know that Misozi should go to school. The inspector and the local school inclusive education co-ordinator (working with the school inclusion team) will arrange for Misozi to attend the small village school where there are 39 other learners.

Resource 5.27: Learning outcomes and learners' profiles (case studies)

Note for trainers:

The competences presented in these lesson plans should be modified to the upcoming school term curriculum competences so that they are immediately relevant to what teachers will be teaching.

Photocopy these lesson plans and stick them individually onto strong card with the lesson plan on one side and the learner's details on the reverse. These will be your training aids. You can add to the resource by writing your own case studies in the contexts where you work and the schools in your area.

(i) Lesson Plan

Grade 1: English

Topic: Letters and sounds – p + a e i o u

Competences: Learners are able to:

- Recognise, pronounce, and write the letter 'P'.
- Identify objects that begin with 'P'.
- Recognise, pronounce, and write pa, pe, pi, po, pu.

Learners with additional needs

- Bupe – deaf but has some speech (not very clear).
- Felesia and Gabriel – severe learning disabilities.
- Chanda – physical disability with missing fingers (has difficulty holding a pencil).

(ii) Lesson Plan

Grade 7: Agriculture

Topic: Planning a school garden

Competences: Learners are able to:

- Identify factors to consider when choosing the site for the school garden.
- Mark the perimeter of the chosen area for the garden.
- Draw out the plan for the garden.
- Identify tools and materials needed and describe their uses.

Learners with additional needs

- Reuben – deaf and does not speak at all.
- Chisoni – learning difficulties with literacy level of Grade 2.
- Katendi – difficulty walking and uses crutches.

(iii) Lesson Plan

Grade 3: Science

Topic: Measuring liquids

Competences: Learners are able to:

- Understand the difference between millilitre and litre.
- Know how many millilitres make $\frac{1}{4}$ litre, $\frac{1}{2}$ litre and 1 litre.
- Measure the above quantities.

Learners with additional needs

- Madalitso – challenging behaviour, lack of concentration, can be disruptive and noisy.
- Joyce – visually impaired (total).
- Wilma – visually impaired with very little sight in one eye only.

(iv) Lesson Plan

Grade 6: Mathematics

Topic: Calculating surface area

Competence: Learners are able to:

- calculate how much glass would be needed if all the windows in the classroom needed replacing.

Learners with additional needs

- Sitwe – physically impaired and in a wheelchair.
- Nosiku – intellectually impaired (slow to process information).
- Mpundu – hearing impaired (50% hearing in one ear only).

Resource 5.28: Action research tasks

Task 1: Meet with your School Inclusion Team (SIT). This should include all the SIT members including teachers, perhaps the deputy head teacher or other senior teachers, four (4) learners plus the community members.

Firstly, you will remind the SIT members of **Module 4**'s screening and identification action research tasks 1, 2 and 3, which they previously completed. Look again at the completed table.

Secondly, you will remind the SIT members of the two interesting case studies which they thoroughly researched; one is a learner with intellectual disabilities and the second is another learner who does not have additional needs. Look closely at the case study of the learner with an intellectual disability.

Evidence of Task 1 completion: Documents that show evidence of having completed these case studies based on the completed table from Module 4's completed table.

Task 2: Using the information gathered during Module 4's action research, the SIT members should convene an IEP meeting to discuss the needs of this learner. Note that this IEP meeting should include the learner (if possible) and a parent/caregiver. Together, this IEP team should create an IEP for the learner with intellectual impairments. You will then bring this IEP to the next training.

Evidence of Task 2 completion: Notes from the IEP meeting; documents showing evidence of IEP creation/completion.

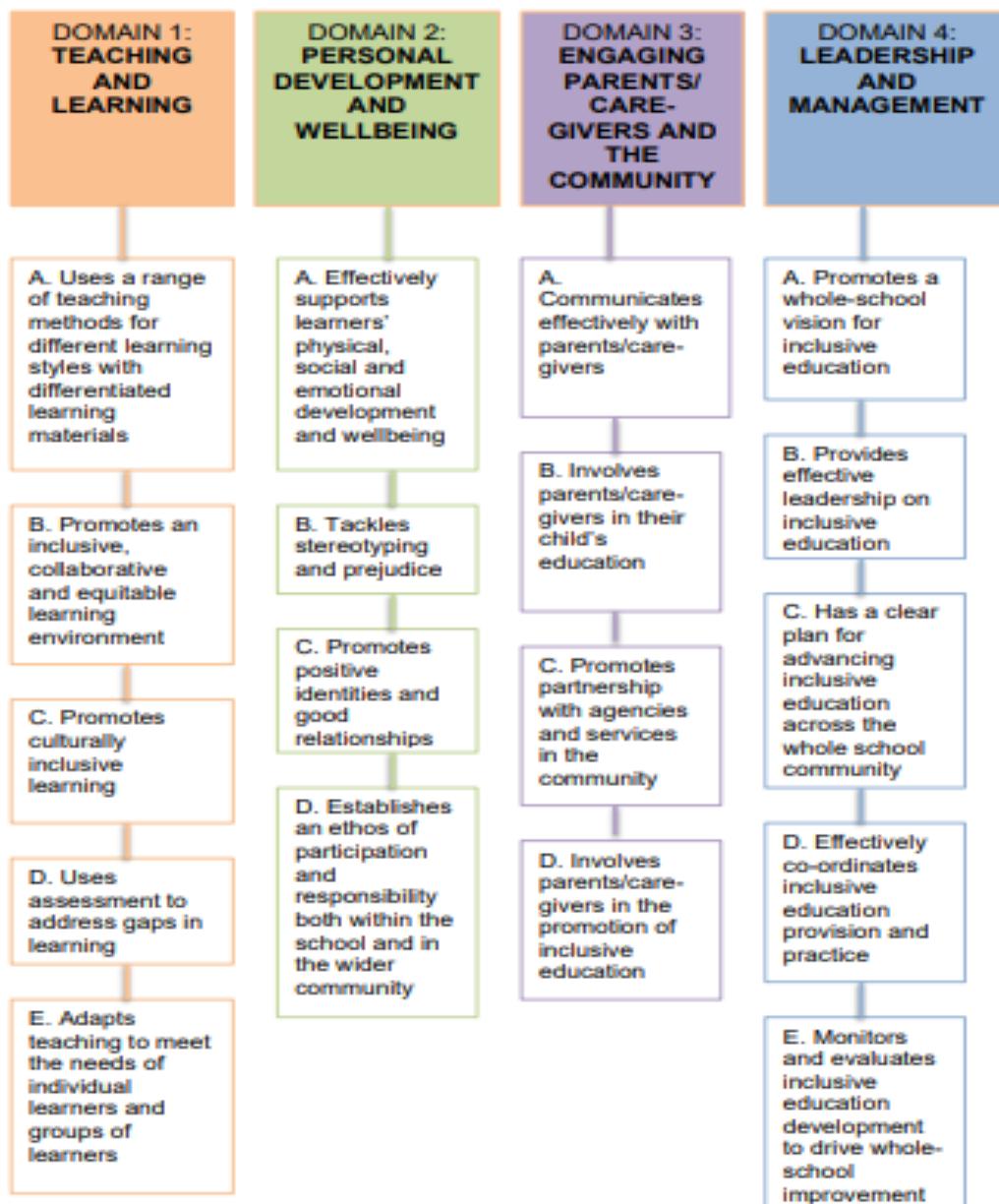
Task 3: Based on the approach that your school has taken for Module 4 Task 4, continue to monitor the general learning levels of all learners. What strategies is the school using to overcome learning losses? How are teaching and learning aids being used to support this? Together with teachers, create a plan for more effective usage of teaching and learning aids so that ALL learners can achieve. Plan for how these aids will also be adapted for learners who face additional challenges.

Evidence of Task 3 completion: Documents showing evidence of a plan for effective usage of teaching and learning aids; pictures of teaching and learning aids created; lists of strategies used to support learners to overcome learning losses.

Resource 5.29: Domains and competencies from the IETT Programme self-assessment framework

Appendix 1: Domains and competencies

Teachers, school leaders and other key stakeholders can use the framework to assess their acquisition of inclusive education competencies in the following areas or DOMAINS. The boxes below each DOMAIN give the competencies that relate to that DOMAIN.



NOTES