

Creating Individual Education Plans and Instructional Aids

Refresher Session for Module 5



Refresher activities for teacher trainers

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

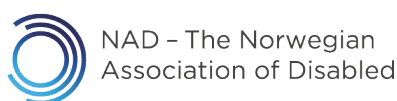
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Module 5: Creating Individual Education Plans and Instructional Aids refresher session

A teacher training resource for teacher trainers

Version 1

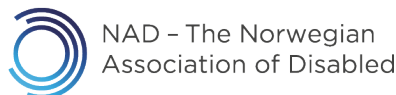
This teacher training resource was developed originally as a collaboration between Norwegian Association of Disabled (NAD) and Enabling Education Network (EENET) for the Ministry of Education in Zambia and Ministry of Education and Vocational Training in Zanzibar.



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Ministry of Education



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Introduction

This Refresher Session for Module 5 is devised to help teacher-trainers refresh their understanding of the module before training schools.

The aim of Module 5 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.

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.

Materials and facilities needed for the refresher workshop

Each participant needs a copy of Module 5 to refer to whilst undertaking this Refresher Session. Further useful reference information is also contained in the Supplementary Module on **Including Learners with Additional Needs**.

The workshop also requires a white screen/wall, laptop and projector for PowerPoint presentations, illustrated by the symbol:



Further materials needed include a flipchart stand, flipchart paper, flipchart pens, packs of felt tip markers, and Bostick/Sticky stuff/blue tac for sticking sheets of paper/flipchart paper on walls.

The room should be large and airy, and accessible to all participants, with fire exits and toilets close by. There should preferably be large circular tables, with a couple of tables for the facilitators at the front for resources, etc.

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 refresher session requires approximately **3 to 4 hours** of training.

Refresher Session for Module 5 (R5): Creating Individual Education Plans and Instructional Aids

Activity R5.1: Introduction



Welcome the participants and explain that this Refresher Session for Module 5 is devised to help teacher-trainers refresh their understanding of the module before training schools.

Remind participants that the aim of Module 5 is to support teachers and other relevant stakeholders' understanding of what an individual education plan (IEP) is, its characteristics, and the reasons why schools develop and use IEPs. Module 5 discusses some of the benefits of IEPs and discusses 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.

Module 5 also focuses on instructional aids, helping teachers 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.



PPT 5.1 – Introduction to Module 5 – slide presentation (5 slides)

Show the **PPT 5.1 slide presentation**, reminding participants of Module 5's aim, it's in-service training (INSET) itinerary and the main points to make when, at the start, recapping about **what an IEP is and what an IEP is NOT**.

Remind participants that 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 learner'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;
- a tool for helping to plan a learner's education. It may also include plans for rehabilitation activities linked to education;
- individual for that learner and fully takes into account her/his abilities and needs;
- a guide for teachers to help the learner in her/his learning;
- a guide for the inputs that will be given by other support staff, where they exist;
- setting targets and goals against which the learner's progress can be observed; and
- a process of teachers collaborating with the learner and parents/caregivers.

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.

In plenary, ask the group if there are any questions.

Activity R5.2: Warm up and recap



30 minutes

Ask everyone to stand up, move around the room and find a partner – each pair then nominate themselves as Partner A or Partner B. **They will be talking**

and listening to each other.

- Ask them to introduce themselves to each other.
- Shout out a question (see below) that Partner A has to answer first. Then after 30 seconds shout it out again for Partner B to answer. Then they do the same again with another question. The pairs are listening to one another.
- The questions start with general ones, to help the participants relax and focus; they then relate more specifically to the training they received when they undertook Module 5.
- The activity is fast-paced and the trainer needs to be strict about only allowing 30 seconds for each participant to answer the question, even if participants protest that they need more time!

Here are the questions in the order they are asked:

1. How do you feel about today's training?
2. Are you looking forward to visiting and training your school?
3. Explain what an IEP is.
4. What are some of the important components of an IEP?
5. What are the different stages of the IEP process?
6. Who should be included in the development and implementation of an IEP?
7. How have you seen instructional materials being used effectively and creatively in support of inclusive education?

Then ask each pair of participants to join the pair nearest them and form a group. It may be that, if there are large numbers of participants, three pairs join to make groups of six. Each group then sits together and will work together when undertaking any group tasks throughout this Refresher Session.



PPT 5.2 – Pictures from the ToT workshops – slides presentation (20 slides)

Show the **PPT 5.2 slides presentation**, a presentation of pictures taken during the Module 5 training undertaken by participants in Zambian Training of Trainers (ToT) workshops. This can assist participants' recollection. **The slideshow should be fast paced**, no more than a few seconds per slide/picture. While the slides/pictures are showing, participants are free to talk in their groups to recall the topics and activities that were undertaken.

Finally, in plenary, ask the whole group if there are any questions.

Activity R5.3: Stages 1-3 of the IEP Development Process

 20 minutes

Remind participants that they brainstormed the types of information that might be useful in an IEP (in Module 5's Activity 5.2a) and then evaluated two different IEP formats (in Module 5's Activity 5.2b). They compared their lists of important information with the information captured by the two different IEP formats provided. They were then asked to put the IEP process in order (in Module 5's Activity 5.3a) and then discussed the cyclical nature of the IEP development process (in Module 5's [Resource 5.5](#) and [Resource 5.6](#)).

Resource R5.1

Case studies: Is this a good example of the IEP development process and implementation?

Ask the groups to do the activity in [Resource R5.1](#). This activity involves reading short case studies and deciding together as a group whether or not they are good examples of the stages of IEP development being followed and the cyclical nature of IEP implementation. Participants discuss in their groups the reasons why the examples are OR are not good examples. Groups share their views in plenary.

Note: suggestions for the trainer to help guide discussion about the case studies are provided at the end of the resource.



PPT 5.3 – Stages 1-3 of the IEP development process – slides presentation (5 slides)



PPT 5.3 – slides 1 – 2

Refer the participants to the characteristics of the IEP process. This is found in [Resource 5.6](#) and [Resource 5.7](#) in **Module 5**.

Emphasise that the IEP development and implementation process is cyclical in nature, not linear. The process may happen more than once with a learner, to keep checking and ensuring her/his learning needs are being addressed. Developing and implementing an IEP is a process that involves collaboration among different role players. These include the school, parents/guardians, the learner, and other relevant professionals and agencies if available. The nature and quality of this collaboration process contributes to the quality and effectiveness of the IEP.



PPT 5.3 – slide 3

Review **Stage 1** using **PPT 5.3 slide 3** (**Resource 5.8** in **Module 5**). Emphasise that 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?



PPT 5.3 – slide 4

Review **Stage 2** using **PPT 5.3 slide 4** (**Resource 5.9** in **Module 5**).

Remind participants that once the information has been gathered about the learner, the IEP team should discuss, agree upon, and summarise it 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.



PPT 5.3 – slide 5

Then review **Stage 3** using **PPT 5.3 slide 5** (also **Activity 5.3e** in **Module 5**). 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 that the different functional areas are: Communication, Movement, Hearing, Seeing, Thinking, Emotional, Behaviour/Social, and Attention.

Remember also that it is important to prioritise. What would help the learner the most so that they can make progress in their learning?

Activity R5.4: Stage 4 of the IEP development process



30 minutes

Remind participants that **Module 5** emphasises setting annual learning goals and short-term objectives. This activity is taken from **Activity 5.3f** in **Module 5**.



PPT 5.4 – Stage 4 of the IEP development process – slides presentation
(13 slides)

Resource R5.2

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

Give out **Resource R5.2**. **Resource R5.2**, together with **PPT 5.4 slides 1 – 13**, provide the trainer with information to present to participants.



PPT 5.4 – slides 1 – 4

Start by presenting **PPT 5.3 slides 1-4**, which the participants can also follow in **Box 1** of **Resource R5.2**.



PPT 5.4 – slides 5 – 7

Now using **Box 2** from **Resource R5.2** and **PPT 5.4 slides 5 – 7**, present information about the importance of breaking longer-term learning goals into smaller, more achievable, short-term objectives. Two examples are provided.

Ask participants for any questions from **Resource R5.2**. Participants should continue to review **Resource R5.2** in their own time.

Resource R5.3

Stage 4 – Creating SMART goals



PPT 5.4 – slides 8 – 10

Give out Page 1 of **Resource R5.3** and show **PPT 5.4 slides 8 – 10**. Working in pairs, participants suggest how to turn these broad, vague goals into SMART annual goals and short-term objectives instead. Assess participants' understanding by walking around the room and checking their answers and then facilitate a quick plenary feedback session.

Pages 2-4 of **Resource R5.3** gives the trainer some ideas for how these vague goals might be turned into SMART annual learning goals and short-term objectives. These ideas are also presented in **PPT 5.4 slides 11 – 13**.



PPT 5.4 – slides 11 – 13

Finally give out pages 2-4 of **Resource R5.3**.

Note that these are suggestions only; participants will come up with their own unique and valuable ideas.

Activity R5.5: Stages 5-7 of the IEP development process

 15 minutes

This activity enables participants to review some of the information presented in **Module 5's Resource 5.12** and **Resource 5.13**.



PPT 5.5 – Stages 5-7 of the IEP development process – slides presentation (2 slides)



PPT 5.5 – slide 1

Show **PPT 5.5 slide 1**. Tell participants that Stage 5 of the IEP development process involves:

- 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.



PPT 5.5 – slide 2

Show **PPT 5.5 slide 2**, to recall **Stages 6 and 7** of the IEP development process.

Remind participants that once the IEP has been created it needs to be implemented. The nature of the implementation will depend on each unique plan – each IEP is **specific to the needs of one learner**. The learner's progress towards achieving the SMARTS goals in the plan 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.

Activity R5.6: IEP team members and key principles for effective collaboration



20 minutes

This activity enables participants to review some of the information presented in **Module 5's Resource 5.15** and **Resource 5.18**.



PPT 5.6 – IEP team members and effective collaboration – slides presentation (8 slides)



PPT 5.6 – slide 1

Show **PPT 5.6 slide 1**, and have participants discuss in groups and record their thoughts on flipchart paper:

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



PPT 5.6 – slides 2 – 6

Show **PPT 5.6 slides 2 – 6** to remind participants of the value of different members in the IEP development and implementation process (information taken from **Module 5's Resource 5.15**).

Regarding learner participation, **Module 5's Resource 5.22** gives many suggestions.

Regarding encouraging parent/caregiver participation, **Module 5's Resource 5.23** gives many suggestions.



PPT 5.6 – slide 7

Show **PPT 5.6 slide 7**. Remind participants that very often if team members are viewed as less important than others, they will feel excluded and their contributions in the IEP process will be minimal, if any. This group includes parents/caregivers, learners, 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 every effort to create an environment where every team member is sensitive to such differences and tries to make others feel comfortable, included, welcomed, and understood. There needs to be an environment where all team members can participate meaningfully and feel their contribution is valued.



PPT 5.6 – slide 8

Show **PPT 5.6 slide 8** and refer to **Module 5's Resource 5.18** for greater detail regarding how each of these principles might be applied in the IEP process.

Activity R5.7: Overview of IEP meetings



20 minutes



PPT 5.7 – Overview of IEP meetings – slides presentation (2 slides)



PPT 5.7 – slide 1

Show **PPT 5.7 slide 1**. In groups, participants discuss the following questions and record their ideas on flipchart paper:

- What an IEP meeting is and its purpose?
- How does one prepare for an IEP meeting?
- How might one ensure parents/guardians participate in the IEP meeting?
- How might one ensure that the learner participates in the IEP meeting?
- How is an IEP meeting facilitated?
- How is an IEP meeting concluded/ended?
- What happens after the meeting?



PPT 5.7 – slide 2

Show **PPT 5.7 slide 2**. Highlight the importance of having an effective IEP meeting. **Module 5's 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.

Refer participants to **Module 5's Resource 5.19** for additional review.

Activity R5.8: Teaching and learning aids we know and use – a review



30 minutes

When trying to enable learners with additional needs to access the curriculum and make progress toward their IEP goals, teachers and other educators often

refer to a lack of resources. For example, they say they cannot 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.



PPT 5.8 – Teaching and learning aids we know and use – slides presentation (2 slides)



PPT 5.8 – slide 1

Show **PPT 5.8 slide 1**. In groups, participants discuss 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, Physical Education, 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 a piece of flipchart paper to each pair and each pair creates a table on it with 3 columns:

SUBJECT AND 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?

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

Teaching and learning aids used by participants displayed in a Ugandan workshop

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



PPT 5.8 – slide 2

Show **PPT 5.8 slide 2**. When feeding back, the trainer challenges 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.

Now is a good time to give to each PT team the '**IEPs and Instructional Aids**' **POSTERS** provided with the materials. These are for them to leave with their pilot schools to display after they have delivered the training. They can also be displayed in the local education office and in the community.

Activity R5.9: Papering the walls with our wisdom



20 minutes

This following activity reinforces the learning from this session; it is not an activity that is in Module 5.

Prepare six pieces of flipchart paper, writing the following statements, each in the middle of a separate sheet (leaving room for comments to be written by participants around each statement):

1. Important components of an IEP are...
2. The stages of IEP development and implementation are...
3. Effective collaboration is important in the IEP process because...
4. Encouraging learners and parents/caregivers to participate in the development and implementation of an IEP is important because...
5. Ways to encourage learner and parent/caregiver participation include...

6. New ideas for using instructional materials made from local resources to support inclusive teaching and learning include...

The pieces of flipchart paper are placed on tables around the room, one on each table, or on the floor at a distance from each other. Each participant then walks around the room and writes something in response to each statement on each sheet of paper. They should try and avoid repeating anything already written on the sheet by other participants. However, they can write something that further develops or responds to another participant's point.

Participants should use felt tip pens and add their points in the style of a mind-map.

Make sure participants keep moving so they cover each sheet in time, and also allow for others to access the statements.

Ask participants to “paper the walls with their wisdom” by displaying the sheets on the walls. Participants walk around to familiarise themselves with all the points on the displays and discuss them with each other.

Emphasise how this refresher session is no substitute for participants reading **Module 5** and its accompanying training materials thoroughly before delivering their school's in-service training (INSET). However, having done this refresher session, they should find re-familiarising themselves with the content much easier.

Give out the '**Module 5 REMINDER CARDS**' pack provided with the materials, for PTs to look through and take to their pilot school provided. Trainers and teachers can carry a set of cards with them, hang a set of cards in the staffroom or office, and use the cards to stimulate chats with colleagues.

Finally, go through the materials participants need to have to prepare and deliver their school INSETs.

Resources

Refresher Session for Module 5

Resource R5.1: Case studies – Is this a good example of the IEP development process and implementation?

Only the text in the box should be given to participants.

Read these case studies. Do you think each case study is a good example of the IEP development process and implementation? Why or why not?

Case study A

Three class teachers in a small rural school sit together once per year to create a generic IEP which they then implement for all the learners in their class who they suspect have special needs or are disadvantaged in some way.

Case study B

In a large school, a team has been created to develop IEPs for 30 learners identified as having special educational needs. For each learner, they gather information about the learner, develop a statement on the learner's level of performance, and identify broad and general areas of learning needs only. The team consists of the director of studies, the deputy head teacher, 2 class teachers, and the senior woman/man teachers. The parents/caregivers and learners are not included in the IEP development meetings nor in the IEP implementation.

Case study C

The IEP team of School C has gathered information about a learner who they feel needs the support of an IEP. They've developed a statement of the learner's level of performance. They set a very general (and ambitious) annual objective that the learner will pass all end of year exams with 80% or higher. The classroom teacher is told that the team will reconvene after the final exams have been marked to see if the learner has achieved this goal. The teacher is encouraged to work very hard between now and the end of the term.

Case study D

School D has a very mixed group of learners, including learners with special educational needs and/or disabilities and learners from three different ethnic/language groups. Classroom teachers are being supported to meet

these challenges as best they can in the classroom. IEPs have been developed for the learners who are still not making progress. These IEPs were developed more than one year ago and have not been revisited or revised since their original creation. Since the learners have not met the initial goals and objectives that were set in their IEPs, the teachers have been encouraged to continue on with the plans as is for as long as it takes until the learners achieve these goals/objectives.

Notes on possible answers, to guide the trainer with facilitating this activity

Case study A: Is it a good example of the stages of IEP development?

- No... because these plans are generic. They are not individualised to the unique strengths and needs of the specific learner.
- No... because they are not being developed as part of a collaborative team.
- No... because the teachers are making assumptions about learners without seeking other sources of information about the learners' strengths and needs.

Case study B: Is it a good example of the stages of IEP development?

- No... because the team only identifies broad areas of learning needs. They should continue on to develop and set specific annual learning goals and short-term objectives.
- No... because the parents/caregivers and learner are not included in the IEP development and implementation.

Case study C: Is it a good example of the stages of IEP development?

- No... because they have only set a very broad annual goal. There are no short-term objectives that will guide the way toward achieving such an ambitious goal.
- No... because the teacher is being expected to shoulder the entire weight of success for this learner without periodic check-ins to ensure adequate progress is being made. Parents/caregivers and other IEP team members should also be supporting the success of the learner.

Case study D: Is it a good example of the stages of IEP development?

- No... because the IEPs are outdated. If learners with IEPs are not making progress toward the initial goals, then there needs to be a process of discussing what the continued challenges are and how annual goals and short-term objectives can be revised so that the learner can be successful.

Resource R5.2: 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 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 R5.3: 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 R5.3].

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 participates and completes 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</p>

	<p>teacher as observed by the teacher during P5 class time.</p> <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.</p> <p>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.)</p>
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