University of Northern Colorado

Scholarship & Creative Works @ Digital UNC

Dissertations   Student Research

5-2023

Use Them or Lose Them: Inservice Teacher Perceptions Of the Usability and Sustainability of Facilitated Individual Education Program Meeting Training and Learned Techniques

Robin O'Shea

Follow this and additional works at: https://digscholarship.unco.edu/dissertations

UNIVERSITY OF NORTHERN COLORADO

Greeley, Colorado

The Graduate School

USE THEM OR LOSE THEM: INSERVICE TEACHER PERCEPTIONS
OF THE USABILITY AND SUSTAINABILITY OF FACILITATED
INDIVIDUAL EDUCATION PROGRAM MEETING
TRAINING AND LEARNED TECHNIQUES

A Dissertation Submitted in Partial Fulfillment
of the Requirements for the Degree of
Doctor of Education

Robin O'Shea

College of Education and Behavioral Sciences
Leadership, Policy, and Development: Educational
Leadership and Policy Studies
Education Leadership

May 2023

This Dissertation by: Robin O'Shea

Entitled: *Use Them or Lose Them: Inservice Teacher Perceptions of the Usability and Sustainability of Facilitated Individual Education Program Meeting Training and Learned Techniques*

has been approved as meeting the requirement for the Degree of Doctor of Education in the College of Education and Behavioral Sciences in the School of Leadership, Policy, and Development: Educational Leadership and Policy Studies, Program of Education Leadership.

Accepted by the Doctoral Committee

_____
Tracy Gershwin, Ph.D., Research Advisor

_____
Silvia Correa-Torres, Ed.D., Committee Member

_____
Paula Conroy, Ed.D., Committee Member

_____
Robyn S. Hess, Ph.D., Faculty Representative

Date of Dissertation Defense _____

Accepted by the Graduate School

_____
Jeri-Anne Lyons, Ph.D.
Dean of the Graduate School
Associate Vice President for Research

ABSTRACT

O'Shea, Robin L. *Use Them or Lose Them: Inservice Teacher Perceptions of the Usability and Sustainability of Facilitated Individual Education Program Meeting Training and Learned Techniques*. Published Doctor of Education dissertation, University of Northern Colorado, 2023.

Effective collaboration among family professional partnerships (FPPs) and work groups such as a multidisciplinary individualized education program (IEP) team has been identified as a critical characteristic in developing a specially designed program for students with a disability. Unfortunately, educators often do not feel prepared to interact and collaborate with colleagues, parents, and community partners due to limited instruction and practice during preservice coursework or in-service professional development workshops. Thus, there continues to be the need for guidance on how to prepare preservice and licensed educators to collaborate effectively within IEP team meetings. An emerging IEP meeting practice called facilitated IEP (FIEP), utilizes a trained facilitator to guide IEP teams through a collaborative meeting framework where all team members' input is valued, heard, and considered in the creation of the student's IEP. The purpose of this study was to investigate the experiences and perceptions of educators who attended the FIEP CPR training and identify associated outcomes experienced during a meeting once the trained educators implemented tools and techniques from the training. Using qualitative interview methodology, 11 educators described their experiences with learning and then applying the FIEP strategies. Participants identified four training characteristics used to maximize the participants learning potential creating an engaging learning environment, benefitting from

experienced knowledgeable trainers, providing interactive opportunities to practice new skills, and encouraging interactive opportunities to collaborate. Additionally, the research identified effective procedural techniques used during FIEP meetings to increase team collaboration and construct a compliant IEP. Participants overwhelmingly agreed the FIEP improved the traditional IEP process through increased team preparation and participation, which in turn increased team members' understanding of the IEP process and content of the IEP, and the strengths and challenges of the student. Finally, six common tools and techniques emerged as effective structural tools used to create an organized, collaborative discussion: (a) agenda, (b) outcomes, (c) parking lot, (d) norms, (e) group memory, (f) roles, and (g) facilitative language.

The implications for practice resulting from this study fall into two main categories, training, and implementation. One strong theme that emerged from the data was the need for more structured opportunities to learn how to collaborate effectively within the school setting and in particular, during the IEP meeting. The information provided gives input to teacher preparation programs and in-service professional development leaders when planning coursework or workshops in critical need areas. To ensure the training opportunities honor the unique needs of the adult learner, suggestions for addressing these characteristics are also provided. Once the educators receive training, preservice programs and state and local district-level agencies would benefit from following a structured implementation process that ensures FIEP team members benefit from the merits of the facilitative structures and strategies and that the facilitators implement with fidelity. Specific recommendations are outlined in the Implications for Practice section.

The study adds to the growing body of literature on the effectiveness of FIEP meetings used as a proactive IEP meeting framework. However, because the FIEP process is a relatively

new practice, it is critical to explore perceptions from more diverse cultures and conditions. Additionally, gathering data from various stakeholders such as the family and the student will help to address common barriers known to limit stakeholder participation, and collaboration.

DEDICATION

To all individuals with disabilities, their families, educators, and supportive communities.

Your courage, persistence, and advocacy have transformed treatment, inclusion, and integration,

and have paved the way for the continued movement toward equal rights.

ACKNOWLEDGEMENTS

organizational context between students, families, and schools--one of the cornerstones of my research.

To my best friend and business partner, Cassie Velasquez, how can I possibly summarize my appreciation in a short paragraph? Your encouragement and support through this endeavor have been instrumental in crossing the finish line, especially while we are also blazing new trails personally and professionally. It is an honor to partner with you. There is no one else who truly understands the drive, obsession, and a little bit of crazy that we bring to this universe. EI my friend, this is happening!

To Brendan and Griffin, my beautiful sons, who have opened my eyes to the challenges and blessings of raising young men in a complicated world. Your individual gifts and perspectives inspire me to listen more and appreciate your journey. Griffin, thank you for the daily check-ins accompanied by teasing eye-rolls when I was worried about not getting it all done and understanding that I really *was* watching you play baseball, hockey, and football while typing away on my laptop. Never forget moms can do it all!

To my parents and sister who have always encouraged me to "go for it" no matter what the "it" is at the time. Thank you, mom and dad, for giving me the spark of inquiry, the compassion to serve others, and the stubbornness to never give up. Thank you, Lisa, my sister, and friend, you are the true educator in our family who has doggedly advocated for students, families, and colleagues for over three decades. It was you who inspired me to join the ranks many, many years ago, changing my life personally and professionally.

And finally, and most importantly, I cannot begin to express the gratitude I have for my wife, Peggy O'Shea. Peggy, thank you for taking every step of this journey with me and knowing exactly how to support me by encouraging, listening, and reminding me to breathe, eat,

and sleep, giving me a hug, dragging me on a walk, and nudging me to pay attention when the

home runs, goals, and touchdowns were being scored. You always listened enthusiastically every

time I had an excited "ah-ha" and supported me when I didn't think I could do it. You

understood and never complained about the 15-hour days or the need for me to read, write,

revise, and repeat…even on vacations. I love you MTL and cannot wait for our next adventure.

TABLE OF CONTENTS

CHAPTER

LIST OF TABLES

LIST OF FIGURES

Figure

CHAPTER I

INTRODUCTION

Meaningful family-professional partnerships (FPPs) are critical to developing a child's academic, social, and emotional growth and have been linked to increased student achievement, improved postsecondary outcomes, and enhanced school and community engagement (Francis et al., 2020; Oswald et al., 2018). There are myriad viewpoints on what constitutes meaningful FPPs, primarily dependent on the partnership's goal. In education, common characteristics of meaningful FPPs include reciprocal, interactive, intentional, collaborative, and trusting partnerships (Blue-Banning et al., 2004; Francis et al., 2020; Gershwin, 2020). For this dissertation study, I adopted the definition of meaningful FPPs as follows,

> A relationship in which families (not just parents) and professionals agree to build on each other's expertise and resources, as appropriate, for the purpose of making and implementing decisions that will directly benefit students and indirectly benefit other family members and professionals. (Turnbull et al., 2015, p. 161)

This quote captures the importance of families and school personnel establishing meaningful FPPs to develop a unique individual education program (IEP) for that student. Although FPPs should permeate all aspects of a child's education, for the purpose of this study, FPPs were considered within the context of the IEP team. The importance of this specialized partnership is supported through guidance from federal education laws and state regulations such as the Individuals with Disabilities Act (IDEA) (2004) and Every Student Succeeds Act (ESSA) (2015). Unfortunately, some teams face barriers to productive collaboration within the IEP

meeting. Adverse experiences stemming from negative power dynamics between families and staff, cultural, economic, or linguistic differences, discrepant views of the student, excessive paperwork, disparate goals or values, and lack of trust are notable factors prohibiting effective FPPs (Gershwin, 2020; Lake & Billingsley, 2000; Mueller & Vick, 2019).

**Meaningful Opportunities for Family Professional
Collaboration: The Individual Education
Plan Meeting**

The IDEA (2004) outlines the necessary steps to develop a unique individualized program, the IEP, for a child who has been appropriately evaluated and found eligible for special education and related services. Eligibility is contingent on a child having a disability that adversely affects educational performance (IDEA 34 CFR §300.8). The IEP is the cornerstone of IDEA as it establishes the specific services and specialized instruction required to ensure students receive a free appropriate public education (FAPE). Through careful development, the IEP becomes a written contract that describes how the student's specific and individualized academic and functional needs will be addressed to ensure growth (IDEA 34 CFR §300.320). To craft this program, a team of individuals who have knowledge or unique expertise about the student collaborates to determine the type, frequency, and quality of services to meet the student's needs (Barrio et al., 2017; Beck & DeSutter, 2020; IDEA, 2004). The IDEA specifically stipulates who shall be on the IEP team, including the child's parents, at least one general education teacher of the child, a minimum of one special education provider of the child, a public agency representation, someone who can interpret evaluation results from the instructional frame, related service providers if there is an area of concern (e.g., speech pathologist), and, when appropriate, the child with a disability. Additionally, the parent or school

agency can invite other individuals who may add expertise related to the student (IDEA 34 CFR §300.321).

Each team member adds knowledge to the discussion within their professional realm or personal experiences with the child. For example, the family members offer insight into the home and community characteristics and the child's strengths, challenges, interests, and preferences. The general education teacher provides information on the general education curriculum, recommendations on specific supplementary aids and services, as well as any supports the child may need to be successful in the general education classroom. Additionally, they are responsible for "positive behavioral interventions and supports and strategies" (IDEA 34 §300.324(a)(3)(i)).

The special education teacher/service provider shares data related to the student's present levels of performance across six areas of academic and functional skills. These domains include academics, cognitive learning, communication, independence and self-determination, physical and health, and social and emotional learning. The special education provider also recommends and assists in modifying the general education curriculum, provides necessary accommodations, and coordinates with the general education teacher to recommend supplementary aids and services. Finally, they make service proposals based on data and expertise of the child's learning process for delivering specially designed instruction to meet the student's unique needs.

The public agency representative must be knowledgeable about the availability of resources of the public agency to allocate those resources when decided appropriate by the team. An individual who can interpret the child's evaluation results is responsible for disseminating this information in a manner that is understandable to all team members to determine the presence of a disability and, subsequently, programming recommendations based on the specific results of

the evaluations. If a student has additional needs, related services providers, such as an audiologist, occupational therapist, etc., are present to provide technical information related to their area of expertise and service proposals. Finally, the student plays a vital role in communicating their strengths, weaknesses, and preferences (Harmon et al., 2020; U.S. Department of Education, 2019). The student's input is particularly important as they near transition activities to ensure their postsecondary goals are constructed in collaboration with the student (when appropriate).

When each team member understands their role in the IEP and has the knowledge, skills, and mindset to collaborate effectively, strong FPP/IEP teams are cultivated, a consensus is more likely obtained, and student outcomes are more likely achieved. Additionally, families, schools, and community agencies who collaborate and create supportive IEPs report increased student success in academics, behavior, engagement, and long-term outcomes (Cavendish & Connor, 2018; Francis et al., 2016, 2020; Gittell & Douglass, 2012; Hancock & Cheatham, 2021; Henderson & Mapp, 2002). Thus, FPPs that practice active engagement and meaningful collaboration during IEP discussions increase the potential for meaningful program development and positive student outcomes.

Effective Collaboration During the
Individual Education Program
Meeting Process

While IDEA promotes shared responsibility for developing and implementing the IEP, it says little about how to collaborate effectively. Despite the policy, educational initiatives, and best practice recommendations for strong collaborative FPPs, exclusionary practices continue to plague IEP meeting collaboration. Pre-service, licensed educators, and family members report a lack of confidence and competence in how to partner with each other (Lake & Billingsley, 2000;

Murray et al., 2008). Markow et al. (2013) conducted a national survey which found 73% of participating licensed teachers believed working with families was one of the more difficult parts of their job. This is not surprising given that pre-service educators' reported perceptions of being ill-equipped and uncertain about establishing and maintaining effective FPPs (Murray et al., 2008). During pre-intervention interviews, study participants were asked about their experiences working with families of children with special needs. Responses revealed a common deficit – they had not had the opportunity to gain professional experience in building working relationships with families. For example, one preservice student commented, "the only experience that I have had was with people who I babysat for, when I was like 15" (Murray et al., 2008, p. 94). Other participants indicated second-hand experiences such as having a sibling or family member with an IEP, a parent who is a teacher, or a parent who has a colleague with a disability.

However, after participating in coursework that integrated families and educators in structured, interactive partnership activities, the pre-service educators described being more comfortable involving parents in educational decisions and programming. One participant noted:

> I definitely now feel more confident about [partnering with parents] . . . before if a parent would come up to me with a problem or concern, like, I was always kind of nervous or hesitant to respond to it, but now I feel like confident and no matter what they may say or have a problem with like I could answer it and feel confident about myself. (Murray et al., 2008, p. 97)

The study further disclosed the pre-service educators' initial perceptions of families as uncaring were inaccurate. After the intervention, many participants amended their perceptions by naming parents as experts on the child and essential liaisons to the school.

Unfortunately, there remains a void in training opportunities for licensed educators and pre-service teacher preparation programs in addressing how to promote meaningful collaborative FPPs related to special education functions such as the IEP team. A recent study by Kyzar et al. (2019) examined the level of exposure to FPP-related content special education teacher candidates receive within their coursework. Results indicated that exposure depended greatly on the type of courses taken. Overall, there was a national trend of limited FPP content taught in university-level special education programs. Numerous research studies have highlighted the need for more training opportunities that prepare educators to work in unison with families and colleagues (Epstein & Sanders, 2006; Kyzar et al., 2019; Murray et al., 2008). For example, in their study investigating how special educators viewed their preparation for facilitating meetings, researchers Beck and DeSutter (2020) conducted a qualitative study to investigate facilitator experiences during IEP meetings. Analysis of the data revealed many of the respondents had not received specific training on how to facilitate an IEP meeting and instead reported learning through "on-the-job training" and "trial by fire" (p. 133). Some participants went on to say they had not received any pre-service or in-service structured training other than related to compliance. Training that does focus on collaboration rarely addresses interdisciplinary practices leaving novice educators ill-prepared to work with other team members (Bricker et al., 2022; Friend et al., 2010; Weiss et al., 2017). It is more difficult to find studies related to the amount or utility of specific IEP meeting preparation for the pre-service or licensed special educator. However, what is evident in the literature is that pre-service and licensed special education teachers, as well as administrators, feel they need more training and support on how to lead IEP meetings and foster meaningful FPPs during the IEP meeting (Beck & DeSutter, 2020; Elbaum et al., 2016; Mueller et al., 2019).

There is one training that has received positive participant feedback in preparing educators to conduct an organized meeting, work collaboratively with all team members, resolve conflict, and improve relationships during the IEP meetings (Mueller & Wagner, 2017). This training, Facilitated IEP Conflict Prevention and Resolution (FIEP CPR) was developed in 1998 by Doug Little and Dr. Joyce Little. As retired educators, they committed to developing a course to address the pervasive negative issues experienced in IEP meetings. Their guiding principles were to design a process for improving interaction and relationships between educators and families while streamlining requisite meetings to improve service delivery (Bellinger & Little, 2000).

The authors incorporated many sources to apply best practices to their curriculum including seminal research related to developing effective, collaborative partnerships (Fisher & Brown, 1989; Schlechty, 1997; Senge et al., 1994), viewing students and families as customers (Schlechty, 1997), communicating effectively, preventing, and resolving conflict, and gaining mutual agreement (Fisher & Brown, 1989; Fisher & Ury, 1991). Additionally, after attending a training session on Essential Facilitation provided by Interaction Associates, the Littles realized meeting facilitation processes were a necessary but lacking component in conducting organized IEP meetings. Subsequently, they partnered with a branch of Interaction Associates, called Interaction Institute for Social Change (IISC), whose primary goal was to assist educational agencies and non-profit organizations in creating collaborative meeting processes. Together, the Littles and IISC leadership developed a methodology for structuring and conducting collaborative, effective, and efficient IEP meetings and complimentary training for educators and other IEP team members (Bellinger & Little, 2000; Little et al., 2013).

In the training, participants learn the facilitated IEP meeting framework which combines strategic planning, facilitative behaviors, and collaborative attitudes. Figure 1 depicts the framework concepts as cogs working in unison, when these concepts work together, facilitation results in sharing responsibility and shared understanding for both the process of developing the student's individualized program and implementing the IEP (Little & Little, 2018). The training is organized into three compartments: (a) setting up for success, (b) conducting the meeting, and (c) ending the meeting and following through. Each is described below.

Figure 1

Facilitated IEP Meeting Framework
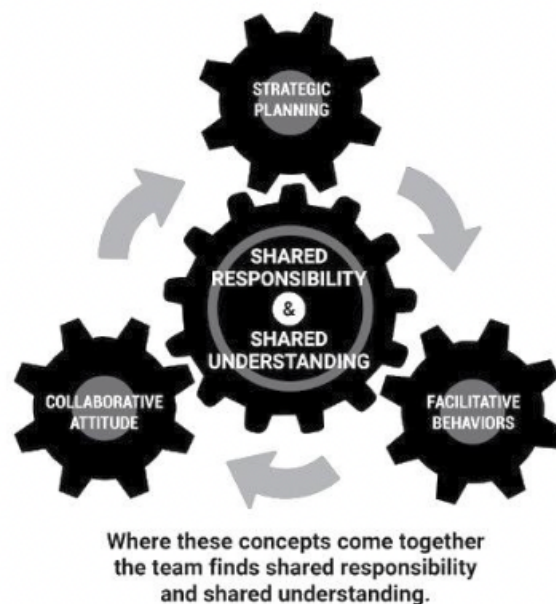
Setting Up for Success

The participant learns how to effectively plan for a meeting by considering key components that may affect the meeting outcomes. These include establishing desired outcomes, defining the meeting purpose, acknowledging unique staff and family characteristics/needs, defining participants' roles, and considering the meeting room arrangement. Additionally, the

participants learn the critical components of developing an effective agenda related to specific outcomes for each student's individual program needs.

Conducting the Meeting

In this section, the participants are introduced to specific visual tools such as graphic charting, using visual outcomes, an agenda, norms, a parking lot, and an action plan. The learners also gain communication strategies that encourage high levels of quality participation and collaboration while still moving a meeting to a successful and efficient conclusion. Participants practice employing prevention and intervention techniques to keep the IEP team members on task. Furthermore, active listening skills are reviewed and rehearsed to ensure the learner comprehends the power of listening to understand and to ensure others feel valued and heard. Finally, participants learn how to navigate conflict by focusing on how biases get in the way of listening and using the guidelines for reconciling differences.

**Ending the Meeting and Following
Through**

In this section, the participants learn how to complete the meeting in a way that increases the likelihood of successful implementation. Concepts covered include how to review and confirm the agreements made during the meeting, efficiently complete the necessary paperwork, address any action plan and parking lot items, and debrief the meeting to uncover what worked related to the process and what changes can be made for next time. Carefully planning the end of the meeting ensures that the team members leave with a full understanding of the IEP content and process by acknowledging what happened during the meeting and assisting the team in initiating actions to implement IEP decisions.

Training Activities

The structure of the training is devised based on the seminal work of Knowles and Vella's adult learning theory. These principles include providing the information in relevant, life-centered scenarios, in a safe and respectful manner where the adult can practice new skills through experiential learning activities, be actively engaged through interactive, self-directing inquiry and discussions, and be able to apply the information to their lives (Allen et al., 2022; Chen, 2014; Cox, 2015; Green & Cassani, 2020; Knowles et al., 2005). This is accomplished through a blend of direct instruction, whole- and small-group discussions, role-play scenarios, coaching, and immediate feedback, providing personal examples from the field, invitations to share difficult situations, modeling the model, etc. Each participant is provided a printed manual and contact information of the trainers to offer support after the completion of the training.

I have been in the field of special education for over 35 years, which means I have conducted and attended many IEP meetings. Unfortunately, the only instruction I received in conducting an IEP meeting was initially through observation as a student-teacher and then learning by doing. Twenty years later, as a special education administrator, I attended the FIEP CPR training and was overwhelmed with the excitement of learning a process to facilitate an IEP meeting in a way that promoted communication and collaboration, while staying focused on the child's needs. With that said, I was also in dismay that this was the first time in all those years that I had this type of formal training.

After attending the training, I implemented many of the structural tools and communication techniques in my meetings and noticed dramatic improvements in the efficiency of the meeting and an increase in the interaction and discussion of all team members. I enjoyed the success so much that I attended the training again within a few months. Although the content

and delivery of the training were the same, I was able to digest and retain even more strategies. As my confidence and ability increased, I began facilitating more difficult meetings and was encouraged by the success of aiding teams to collaboratively move through conflict with a process that enabled them to come to an agreement and regain a productive working relationship. These experiences compelled me to invest personally by becoming a national trainer for the course and later a co-owner of the company.

As a trainer, I have the privilege of interacting with educators across the nation and hearing their personal stories of angst related to working within their IEP teams. As a parent of a now-adult with a disability, I have also experienced the complicated balance of maintaining a partnership with various personalities and levels of experts while staunchly advocating for my son's needs based not only on his strengths and challenges in school but also on his unique characteristics at home and in the community. As a trained facilitator I felt the relief of learning and using a guided process to ensure the needs of the student were being met and the voices of all team members were being heard. Based on this personal and professional exposure coupled with over 40 years of research on ineffective FPP and IEP teams, I am compelled to dig deeper into the national-level frustration occurring between IEP team members and explore the perceptions of others who have attended the FIEP CPR training to identify any themes related to the typical attendee's experiences and outcomes as a result of attending the training.

Thus, through this study, I hoped to gain an understanding and insight into the perceptions and experiences of the sample attendee and any outcomes the participants experienced when implementing the FIEP tools and techniques. As a trainer and co-owner, I want to be aware of any activities that promote skill acquisition and identify and adapt any activities or content that require attention. Because I am closely related to the content, I took

measures to ensure the participants have not had personal contact with me before the interview. To maintain this neutrality, all research participants had received training from trainers other than myself and did not have any communication or interaction with me related to business operations (e.g., contract development, scheduling training).

Statement of the Problem

Due to limited training opportunities geared toward conducting meaningful and effective IEP meetings, it is imperative educators are provided with this relevant information to ensure they develop the skills to conduct IEP meetings with confidence and competence (Beck & DeSutter, 2020; Kyzar et al., 2019; Mueller et al., 2019). In their seminal report on effective teacher professional development, professor and researcher Darling-Hammond et al. (2017) linked the importance of structured learning opportunities and positive changes in educator behaviors, practices, and procedures. Additionally, any skills taught must be practical and sustainable. Mueller and Vick (2019) suggested educators participate in simulated IEP meetings to ensure their access to a valuable learning experience. Similar recommendations that promote authentic practice during training have been noted in research across education as well as in the medical, business, and technical fields (Buil et al., 2019; Dasgupta et al., 2017; Fish, 2008; Jones & Peterson-Ahmad, 2017; Zeitlin & Curcic, 2014). As mentioned previously, the FIEP CPR training has received positive feedback from participants. In a report by Mueller and Wagner (2017), 287 practicing educators (teachers and administrators) who participated in the training were surveyed to determine overall satisfaction and perceived quality of the training, the impact of training on staff and parents, and the use of techniques learned during the training. In addition, 34 of those individuals were interviewed to provide an in-depth understanding of their experiences with the FIEP training. Over 99% of the respondents rated themselves as adequately

prepared to begin utilizing their new skills after the training and felt prepared to work collaboratively with their colleagues and families during an IEP meeting. Meanwhile, over 95% of the respondents agreed that they learned effective conflict resolution skills and how to address challenging situations with families or diverse stakeholders. Finally, 70% of the respondents reported that their relationships with all team members improved after implementing the transparent, productive process.

Mueller and Vick (2019) expanded this work by investigating FIEP procedures that team members identified as meaningful. They found that educators who regularly implemented facilitation techniques were highly satisfied with the meeting process and outcomes. The researchers recommended integrating these procedures into pre-service programming with ample simulation practice and case study activities based on overwhelmingly positive feedback. More recently, an exploratory study by Beck and DeSutter (2020) mirrored these findings. For example, respondents agreed, "professional training for all IEP team members may enhance their abilities to contribute meaningfully to meeting discussions" (p. 143). There is no doubt that educators benefit from specialized training to collaborate and communicate with their IEP team members effectively and, more specifically, with family partners. While it is encouraging that adequate training has been identified as effective in the development of collaboration and communication skills, more information is needed on the perceptions and outcomes of educators who have attended the training. With this knowledge, more effective training can be devised to address the lack of competency and confidence in conducting collaborative, meaningful IEP meetings.

Significance of the Study

Collaboration among IEP team members is a guiding principle of IDEA (Bricker et al., 2022; IDEA, 2004; Weiss et al., 2017). In addition, professional organizations (such as the Council for Exceptional Children and the Council of Administrators of Special Education [CASE]), identify collaboration as a key element required for initial teacher preparation. Collaboration is named multiple times and across standards related to learning environments, instructional planning, and team collaboration. For example, Initial Special Education Preparation Standards (2012) Number 7 states,

> Beginning special education professionals collaborate with families, other educators, related service providers, individuals with exceptionalities, and personnel from community agencies in culturally responsive ways to address the needs of individuals with exceptionalities across a range of learning experiences. (Initial Preparation Standards, Collaboration, 7.0)

Collaboration is also supported through government agencies (such as, the Collaboration for Effective Educator Development, Accountability, and Reform Center [CEEDAR] and the Professional Practices and Standards Commission [PPSC]). Both identified collaboration as one of the core high-leverage practices in special education. In addition, there are over 70 Parent Training and Information Centers throughout the United States designed to provide support and information related to training and family advocacy (Rossetti & Burke, 2019). These training centers are critical in increasing parent understanding of the IEP content and process. The need to increase parent understanding is supported throughout research (Gershwin, 2020; Lake & Billingsley, 2000; Mueller & Vick, 2019; Rossetti et al., 2021). In an effort to understand parent satisfaction with IEP meetings, Fish (2008) interviewed parents and found that they identified

that greater understanding the IEP process and special education law would be a major improvement for IEP meetings. Respondents indicated that they were satisfied with their meetings when parents were included in discussions and encouraged to ask questions.

Special educators are the conduit to service coordination for students who receive special education services. Thus, the teachers must develop skills to collaborate with a range of professionals and family members. This service coordination is more likely accomplished when the special education teacher can "organize and facilitate effective meetings with professionals and families" (McLeskey et al., 2017, p. 356). Currently, FPP and IEP teams are struggling to communicate and collaborate effectively. Subsequently, when teams are ineffective, the student's academic, functional, and social needs are at risk (Gershwin, 2020; Lake & Billingsley, 2000; Mueller & Vick, 2019). As mentioned previously, decades of research identify specific issues hindering meaningful and productive collaboration including uneven power dynamics; cultural, economic, and linguistic differences; discrepant views; confusing processes and paperwork; and lack of trust (Gershwin, 2020; Lake & Billingsley, 2000; Mueller & Vick, 2019; Rossetti et al., 2021). However, there is a lack of training opportunities for licensed educators to build the necessary skills to address those barriers (Kyzar et al., 2019).

Further exploration is necessary to determine what training techniques are valuable and promote sustained implementation and generalization of tools learned in the training. This exploratory study examined the perceptions and experiences of the FIEP CPR training attendees related to their experiences during the training and subsequent outcomes when using the techniques after the training. The findings provide additional guidance to the existing literature on creating collaborative, meaningful IEPs by identifying themes related to the social validity of specific facilitation tools and training experiences.

Purpose of the Study

The purpose of this study was to investigate the experiences and perceptions of educators who attended the FIEP CPR training and identify associated outcomes experienced during a meeting once the trained educators implemented tools and techniques from the training. Eleven educators were individually interviewed. Participants were asked to describe specific aspects of the training that stood out to them as well as how IEP meeting processes or experiences have changed for them after attending the training and implementing tools and techniques learned. As a retired educator, trainer, and co-owner for the IEP CRP training company, the intent of this study was to provide information about the needs of the adult learner to maximize their learning experiences and ensure they gain the necessary skills to address relevant barriers to collaboration. Additionally, a goal of the study was to examine the educators' reported experiences pertaining to the implementation of specific tools and, in turn, highlight promising practices for facilitating IEPs and creating collaborative IEP team meetings.

Research Questions

The questions developed for this qualitative research study focused on the experiences of licensed educators who had participated in FIEP CPR between one and three years before the study. The guiding research questions for this study included:

Q1   What are the experiences of licensed educators who participated in the FIEP CPR training?

Q2   How does the experience of the training inform or shape the participant's outcomes of their IEP meetings?

Definition of Terms

It is imperative to understand specific terms related to a study. In addition, precisely defined terms assist the researcher in ensuring reliability and possible bias. Because this is a qualitative, inductive study, terms are tentative and may change as the investigation evolves. If

new terms arise, they will be defined in the procedure sections of the manuscript (Creswell &

Creswell, 2018).

Collaboration: A group of two or more people who voluntarily join, pool, or coordinate

     resources to engage in shared problem-solving and decision-making while working

     towards a common goal (Bricker et al., 2022).

Facilitation: The use of procedural and collaborative tools and strategies to increase meeting

     effectiveness and efficiency as well as ensuring all team members have an equal voice in

     making decisions (Mueller & Vick, 2019).

Family: A parent, guardian, or extended family member who represents a child at an IEP

     meeting.

Family-professional partnerships: Individuals including the student, family, and professionals

     who value each other's expertise and resources, with the intent to make and implement

     decisions that will benefit the student, their family, and the supporting community

     (Turnbull et al., 2015).

Individual education program: An educational program written for each student with

     disabilities specially designed by an IEP team, to meet the child's individual needs

     (IDEA, 2004).

Individual education program meeting: A written statement for each student with a disability

     that is developed, reviewed, and revised in a meeting in accordance with Federal

     regulations (IDEA, 2004 Sec. 300.320).

Individual education program team: A group of individuals who have an educational interest

     in a child with a disability who share the responsibility of providing information related

to their expertise and collaborating to develop an individualized education program that

addresses that child's specific needs (IDEA, 2004 Sec. 300.321).

In-service training: Training that is provided to licensed educators during their employment

with a public school district.

Licensed educator: Any person who holds a valid state-issued credential to work legally with

students in a public education setting including but not limited to a classroom teacher,

school psychologist, school administrator, etc.

Pre-service training: Training that is provided as a component of a formal educator preparation

program occurring before formal licensure.

Student with a disability: As defined by IDEA, the term is understood as follows:

A child with a disability is a child with mental retardation, hearing impairments

(including deafness), speech or language impairments, visual impairments (including

blindness), serious emotional disturbance, orthopedic impairments, autism, traumatic

brain injury, other health impairments, specific learning disabilities, deaf-blindness or

multiple disabilities, and who, by reason thereof, needs special education and related

services. (IDEA 34 Sec. 300.8(a)(1))

Conclusion

The IDEA instructs IEP team members to work collaboratively to develop a unique and

robust program for students with a disability. Unfortunately, IEP team members, including

educators and family members, report a lack of confidence and competence in how to effectively

partner with each other (Fish, 2008; Lake & Billingsley, 2000; Martin et al., 2006; Mueller &

Vick, 2019; Murray et al., 2008; Zeitlin & Curcic, 2014). To make matters worse, educators do

not believe they receive sufficient training to prepare them for this critical part of their job

(Markow et al., 2013; Murray et al., 2008). Inadequate preparation and heightened expectations contribute to teacher burnout, which can negatively affect job satisfaction, job performance, and, ultimately, teacher attrition (Carver-Thomas & Darling-Hammond, 2019; Hester et al., 2020). Multiple studies indicate that teachers who perceive a culture of collective responsibility and support from their colleagues are more satisfied and committed to their job (Carver-Thomas & Darling-Hammond, 2019; Fowler et al., 2019). Further, those who received relevant professional development opportunities during the school year were more committed to staying in their positions (Billingsley & Bettini, 2019). For these reasons, supportive, relevant in-service professional development opportunities offer a feasible solution for addressing identified stressors.

The next chapter, the literature review, focuses on providing background, purpose, and intent of IEP team collaboration and in-service pedagogy related to the IEP meeting processes. This section includes: (a) the historical foundations and development of IEP law regulations, (b) IDEA-required team members and their functions, (c) parent and teacher experiences with IEP meetings, (d) barriers to collaborative meetings, and (e) gateways to meaningful collaboration and effective IEP meetings. The review hoped to provide foundation for the current study, including gaps in the research and a rationale for exploring more robust methods to support and educate IEP team members on conducting effective, efficient, and collaborative meetings.

CHAPTER II

REVIEW OF LITERATURE

Laying the Foundation of Special Education

Historically, individuals with disabilities were considered a burden, pitied, cast aside, or

hidden (Shapiro, 1994; Spaulding & Pratt, 2015). This negative perception created fear and

ignorance-based mistreatment of individuals with disabilities. Many individuals were forcibly

institutionalized, shuttered away from mainstream society, and barred from any education and

social interaction opportunities, stemming from this negative opinion and families' lack of

resources and knowledge. Rather than providing care and therapy, the institutions focused on

controlling the residents and preserving "community peace." Local laws perpetuated this

treatment through statutes promoting the incarceration of individuals with mental illness or

physical and cognitive disabilities to protect society from contamination (Appleman, 2018;

Spaulding & Pratt, 2015).

In the early 19th century, institutionalization changed slightly with the "moral treatment"

approach, which promoted exercise, nourishment, and limited use of restraints (Appleman,

2018). Around the same time, a few residential schools based on Samuel Howe and Thomas

Gallaudet's work were created for students who were deaf or blind (Spaulding & Pratt, 2015).

Nonetheless, the desire to segregate those individuals with disabilities who were often referred to

as "undesirables" and "deviants" from society remained prominent (Appleman, 2018). As the

population increased across the nation, institutionalization increased, causing overcrowding and

a decline in treatment, ultimately resulting in human warehousing. Private asylums and public

mental hospitals changed slightly during the Industrial Revolution when institutions introduced life skills and vocational training to enable residents to work in factories as cheap labor in return for housing (Spaulding & Pratt, 2015). Unfortunately, the working conditions were no better than the institutions.

The language used to describe individuals with disabilities added to these adverse perceptions. From early on, the medical model of disability utilized dehumanizing language that often ignored the person and focused solely on the disability as a pathology, abnormality, or something to be "fixed" (e.g., cripple, mentally retarded) or deficit of the individual (Andrews et al., 2019; Bogart & Dunn, 2019; Ziegler, 2020). As mentioned previously, laws and statutes making it a crime to be disabled included monikers such as idiots, drunkards, fools, and handicapped to describe individuals with mental illness and physical or cognitive disabilities (Appleman, 2018; Ziegler, 2020). In addition, in the late 1800s, exclusionary laws were crafted to legally prohibit persons with physical disabilities from the public. These laws, referred to as "ugly laws," perpetuated fear and disgust due to negative terms such as diseased, maimed, and mutilated used to describe individuals with physical disabilities (Ziegler, 2020, p. 6).

Subsequently, these terms permeated common vernacular and devolved into labels for slang and insults. For example, mental retardation was initially used to classify those requiring specific services or aid related to their intellectual disability. Unfortunately, it was also used to describe people without disabilities as someone who was "dumb." These recusant colloquialisms reinforce negative perceptions and marginalize people with disabilities (Francis et al., 2020; Ziegler, 2020). Labeling is a sign of disrespect, as well as a dangerous practice. In the study of self and self-concept, the respected sociologist Charles Cooley developed the looking glass theory, which suggests that a person develops their self-concept through communication and

interaction with others, including family, caretakers, and close community (Francis et al., 2020; Wiley, 2011; Zhao, 2015). Using labels once meant for medical diagnosis in a derogatory manner devalues the status and self of individuals with disabilities and creates negative perceptions, social inequity, and microaggressions, ultimately creating a system of separation and a focus on differences rather than sameness (Francis et al., 2020).

Using labels is further supported by social role valorization theory, the concept that those in valued roles are respected, trusted, and provided opportunities while those in devalued roles are often mistreated, misunderstood, and marginalized (Francis et al., 2020; Wolfensberger, 2000, 2011). This theory also extends to the influence of those in influential, valued roles. Their beliefs ultimately influence the other's fate. For example, if an individual with a disability is perceived as incapable and a strain on the caretaker or society, their social value decreases, and opportunities become limited. In contrast, if the individual with disabilities is valued by family and the surrounding community, their opportunities such as care, employment, and socialization increase (Wolfensberger, 2011).

The inclusion and use of negative and dismissive terminology in legal and professional capacities devalue individuals with disabilities on a macro-societal level. Fortunately, the opposite is also true. Francis et al. (2020) outlined the effect terminology has on the value of FPPs related to appropriate care and legal decision-making for students with disabilities. Strategic use of language and labeling has been used to expose and educate, ultimately promoting better treatment, raising consciousness and expectations, and influencing behaviors of those in power (Francis et al., 2020).

Birth of Social Reform

In the late 1800s educator and social reformer, Dorthea Dix used rhetoric to expose the horrific treatment of the institutionalized and appeal to society's moral duty to halt atrocities (Michel, 1994). After visiting numerous almshouses, jails, and asylums, she appealed to legislative bodies and the general population through speeches and publications describing the abhorrent conditions in explicit detail (Dix, 1843; Michel, 1994). In her book, *Memorial: To the Legislature of Massachusetts, Protesting Against the Confinement of Insane Persons and Idiots in Almshouses and Prisons*, Dix recounts the horrors she observed while visiting these facilities. She provided vivid accounts describing "human treatment reduced to extreme degradation and misery," adding that "the insane persons were imprisoned in cages, closets, cellars, stalls, pens! Chained, naked beaten with rods, and lashed into obedience!" (Dix, 1843, p. 4).

Dix (1843) understood the power of words and their ability to promote and deter progress. Therefore, she provided case studies of patients to relate to, focusing on the upper class or prominent citizens. These case studies included direct quotations from patients resulting in increased sympathy and improved conditions (Michel, 1994; Spaulding & Pratt, 2015). However, loose commitment laws and the closure of many almshouses continued to overpopulate the institutions creating the need to expand the control of citizens with mental illness and other disabilities (Appleman, 2018). A new focus on exclusion and eugenics was formed to assure the inferior classes, including degenerates, physically and cognitively disabled, and the mentally ill were segregated, cataloged by ability, and sterilized to prevent reproduction. Children were included in this process. Some ecumenists believed the children were a "menace to society" and that "catching them early" saved money by sending them to colonies (Appleman, 2018, p. 445).

This exclusion was legitimized through the court systems. For example, the Massachusetts Supreme Judicial Court ruled children who were "weak in mind," made "unusual noises," and would not benefit from education could be removed from school (Yell, 2015). Similar rulings and state legislation continued to perpetuate school exclusion for an additional 75 years. Although compulsory attendance laws enacted in the late 1800s gave schools the right to prosecute if parents did not send their children to school, these laws did not apply to children with disabilities (Yell, 2015).

In 1909, the White House Conference on Children was organized to raise public awareness about the welfare of dependent and neglected children. Child mortality rates, child employment, and institutionalization were at an all-time high. In response, the conference focused on the harmful effects of institutions, orphanages, and almshouses and developed proposals for keeping children in their own homes, moving children from institutions to the public school system, and creating a foster family care system with state oversight (Yell, 2015). Nonetheless, children with disabilities continued to struggle from poor educational opportunities. Thirty years later, the 1931 White House Conference on Children estimated 10 million children required special education in America, but only 1 million received services due to eugenic philosophies (Spaulding & Pratt, 2015).

The Parent Movement

Exclusion and mistreatment of children with disabilities initiated a surge in what is often referred to as the Parent Movement. Parents, particularly mothers of children with disabilities, were historically dismissed or ignored when advocating for their children. When families inquired about caring for their child at home, physicians, teachers, and psychologists often admonished them for wanting to deprive their children of the care an institution could provide

(Leiter, 2004; Shapiro, 1994). Worse, some were accused of causing their child's afflictions due to their sinfulness (Shapiro, 1994).

In response, parents created local councils and groups to support each other, disseminate information, and advocate for their child's educational rights (Yell, 2015). The first group was formed in 1933 and consisted of five parents of children with cognitive disabilities from Cuyahoga County, Ohio. These parents protested the prohibition of their children from public schools in their region. As a result, the county established a special class for the students and set the stage for forming more advocacy groups (Yell, 2015). These powerful, passionate advocates paved the way for future acceptance and inclusion and is discussed below in the section on federal special education law, the IDEA.

Building from the success of groups that supported disabled WWII veterans and other individuals with physical disabilities, families joined together to voice their concerns about below-par and exclusionary educational practices. From the late 1930s to the early 1950s, these groups grew in numbers and power, eventually evolving into national movements. Over the next 10 years, groups such as the National Association for Retarded Citizens (ARC) and the Council for Exceptional Children (CEC) played a critical role in the equality movement. Strong social advocates worked to correct misperceptions, decrease institutionalization, increase educational opportunities, and develop groundbreaking legislation to increase access to public education. Strong advocacy through FPPs resulted in civil rights court cases and, ultimately, legislation and equal education policies (Yell, 2015).

From Grassroots to the Courtroom

A pivotal moment for students' civil rights resulted from the landmark case *Brown v. Board of Education* (1954) (hereinafter referred to as Brown), which established racial desegregation of all public school systems. While this case did not specifically address segregation or exclusion related to disabilities, it did set an essential precedent for applying the equal protection clause of the Fourteenth Amendment to the educational system. The article guarantees that no state can deny equal protection of the law to anyone within its jurisdiction (Yell, 2015). Unknowingly, Chief Justice Earl Warren foreshadowed a movement with his statement,

> These days, it is doubtful that any child may be reasonably expected to succeed in life if he is denied the opportunity of an education. Such an opportunity, where the state has undertaken to provide it, is a right that must be made available to all on equal terms. (Brown v. Board of Education, 1954, p. 493)

Progress was slow, but continuous. Two landmark cases again brought forth by concerned families built upon the Brown decision and continued balancing and shaping equal access to education. Both cases ultimately succeeded in creating a change for children with disabilities. *Pennsylvania Association for Retarded Citizens (PARC) v. Commonwealth of Pennsylvania* (1972) (hereinafter referred to as PARC) was a seminal case challenging Pennsylvania's state law denying education to children who had not attained the mental age of 5 years by first grade or 8 years old. In response, 13 families organized and formed the Pennsylvania chapter of ARC, the Association for Retarded Citizens, and brought the first right-to-education suit in the country (Danforth & Connor, 2020; Gilad & Rimmerman, 2014; Yell, 2015). The class-action lawsuit argued three main points: all children with "mental retardation"

could benefit from education, education for children can include programming other than academics (i.e., self-care), and finally, students who received education early in life benefited from better educational outcomes. The case was resolved with a consent agreement ensuring FAPE for all children with mental retardation between 6 and 21 years old (Gilad & Rimmerman, 2014; Yell, 2015).

Subsequently, *Mills v. Board of Education of the District of Columbia* (1972) (hereinafter referred to as Mills) expanded the PARC ruling to include all children with disabilities, including those with mental, behavioral, physical, or emotional disabilities (Mead & Paige, 2008; Yell, 2015). In addition, it dealt with the issue of the cost of providing education for students with disabilities. The Washington DC public school system argued that providing specialized instruction to certain children with special needs was impossible due to high associated costs. Judge Waddy did not find this argument reasonable, and instead, the Court ruled,

> The District of Columbia shall provide to each child of school age a free and suitable publicly supported education regardless of the degree of the child's mental, physical, or emotional disability or impairment. Furthermore, defendants shall not exclude any child resident in the District of Columbia from such publicly supported education on the basis of a claim of insufficient resources. (Mills, 1972, p. 881)

Additionally, the judge addressed the need for procedural notification to families before making any educational programming decisions about the related child. This ruling was the first acknowledgment of the parents as partners in developing educational programming for their child. Both the PARC and Mills cases opened the door for similar federal court cases and inspired a Congressional investigation into the status of children with disabilities. After reviewing statistics from the Bureau of Education for the Handicapped, it was estimated that

approximately one-half of the 8 million children "with handicapping conditions" were receiving educational services (Danforth & Connor, 2020; Mead & Paige, 2008; Yell, 2015). Through lawsuits and conscience-raising advocacy and activities, parents, Congress, and other allies developed legislation ensuring public education for all students with disabilities.

Families and Community Stakeholders as Allies for Social Justice

During the 1960s civil rights movement, the Elementary and Secondary Education Act (ESEA) was crafted and signed into law to provide state funding to improve educational opportunities for impoverished children. As a result, schools across the nation benefited from improved library systems, new technology (e.g., audio-visual aids), professional development and research, the creation of additional supports for at-risk students, and parental involvement programming (Conrad, 2020; Yell, 2015). The ESEA led the legislative journey for focusing efforts on how to meet marginalized students' needs. In 1975, the Education of the Handicapped Act (EHA) replaced Title VI of the ESEA to encourage state agencies to improve educational programs for students with disabilities. This law mandated all students with disabilities receive specialized services and provided colleagues and universities funding to train teachers in special education strategies (Yell, 2015).

In 1975 Congress members, parents, children with disabilities, educational professionals, medical doctors, and other concerned professionals collaborated to create the seminal legislation Public Law 94-142, The Education for all Handicapped Children Act (EAHCA), later renamed and hereafter referred to as IDEA. Co-authors of the legislation, Senators John Brandemas, and Bob Stafford recount this coalition's importance and the impactful lessons gained from expert testimony (U.S. Senate Report, 1985). In the 1985 Hearing before the Subcommittee on the Handicapped, Senator Brandemas stated,

We listened to horror stories from educators, state officials, parents, and representatives

of handicapped groups who told us of handicapped children placed in schools but left to

languish without help; of children allowed to stagnate in large, impersonal state

institutions; of children simply left at home with no chance of education at all. (U.S.

Senate Report, 1985, p. 19)

This law helped bridge the gap for children still excluded from the public education

system. This law was considered a fiscal policy for many due to the administrative funding

provisions awarded to states that developed education policies for students with disabilities

(Rodriguez & Murawski, 2020). However, it was also an influential civil rights act that promoted

the development of a unique and individualized program for each student, ages 3 to 21, who

qualified for specialized instruction and services through nondiscriminatory testing and

placement procedures. Additionally, it guaranteed students a FAPE in the least restrictive

environment (LRE). The law also protected student and family rights through due process

procedures and intensified parent involvement in developing the IEP (Rodriguez & Murawski,

2020; Yell, 2015).

Since the passage of IDEA, the law has evolved through reauthorizations in 1983, 1986,

1990, 1997, and 2004, largely due to advocacy by parents at the local level as well as testimony

from parent and companion stakeholders (e.g., close relatives, community members, educators,

etc.) at Congressional hearings (Rossetti et al., 2021; U.S. Commission on Civil Rights, 2002).

For example, in 1990, individual transition plans were added and specified that the student aid in

the plan's construction to help the student transition to post-secondary activities. Additionally,

the law was renamed the Individuals with Disabilities Education Act which marked the initiation

of using "person-first" language (e.g., changing the label of "handicapped" to "individual with a

disability") (Yell, 2015). The failed reauthorization punctuated the power of parental advocacy in 1995. Parental protests of specific components related to discipline and the recoupment of attorney's fees delayed the process until 1997 (Turnbull et al., 2011).

In a briefing on the reauthorization of IDEA in 2004, advocates ranging from family members, public attorneys, research institutes, federal agencies, and local special education teachers came together to provide their input and experiences related to students' civil rights with disabilities (U.S. Senate Report, 2003). Specifically, these experts testified to the lack of compliance to educate students in the least restrictive environment, the over-representation of students of color in special education, disciplinary exclusions of students in special education, limited parent training, and overwhelming paperwork. The presentation of their views and recommendations resulted in significant changes in better meeting the needs of their children, valuing the input from the students in their programming, and promoting respectful language when describing individuals with disabilities. In 2004, the Senate Committee on Health, Education, Labor, and Pensions heard and heeded input and complaints from parents, educators, health providers, and others that IDEA required numerous amendments to improve the quality of education for students with disabilities. The U.S. Senate Report found and reinforced this concept through specific language related to the parent/family role in the student's education. The findings proclaimed,

> Over 30 years of research and experience have demonstrated that the education of
> children with disabilities can be made more effective by strengthening the role of parents
> and ensuring that families of such children have meaningful opportunities to participate
> in the education of their children at school and home. (U.S. Senate Report, 2003, p. 105)

The commitment of these strong, unified voices promoted progress and positive change in the education of children with disabilities (Rossetti et al., 2021). Also, they demonstrated the importance of public advocacy as both relevant and powerful at the federal and local level.

Individuals with Disabilities Education Act and the
Intended Family-Professional Partnership

The cornerstone of IDEA (2004) is the rigorous development and proper implementation of the IEP, a document that explicitly describes and directs how a child with a disability receives FAPE (Yell, 2015). Free and appropriate education is defined as special education and related services that: (a) are provided at public expense; (b) meet the standards of the state public education agency; (c) include appropriate preschool, elementary, or secondary school education; and (d) are provided in conformity with the IEP (20 USC §1400 (8) (2105)). Many components make up the IEP. However, in essence, the document outlines the student's current academic and functional performance, annual goals, and the specific service plan that ensures reasonable progress on the goals (Yell, 2015). To develop such a program, IDEA (2004) describes the mandatory IEP team members and their role in working together to design the child's unique program. These members must associate effectively as an FPP to create a robust and appropriately ambitious IEP (Turnbull et al., 2017).

There are various relationships to consider when thinking of effective FPPs, particularly related to the members of an IEP team. For example, interactions between student-parent, student-educators, student-community members, parent-educators, educators-educators, parent-community members, and educator-community members are essential in pairs and as a team. While all IEP team members are equally important, IDEA emphasizes the importance of parental involvement in the development of their child's IEP as one of the six principles of the law (Jung, 2011; Yell, 2015). The IDEA distinctly promotes parent involvement by outlining how to

address parent concerns and disagreement (IDEA § 1414(d)(3)(A) (ii), IDEA § 1416 (b)(6)) as

well as how to include parent input on critical factors such as the student's present levels of

performance and placement (IDEA § 1414 (d)(4)(A), IDEA § 1414 (e)). Congress also

punctuates the parent-professional partnership by asserting the student's success depends on

"strengthening the role of parents" in conjunction with "highly qualified teachers" who have

"high expectations" (20 USC §1400(c)(5)(B). Finally, parent involvement is explicitly supported

by seminal court cases providing precedence for IEP teams. For example, an Illinois court held,

> [T]he failure to receive and consider parental information, including evaluations they
>
> may obtain, directly denies parents the pivotal role they should enjoy in the development
>
> of their child's placement. This role includes not only providing evaluations or other
>
> information, but discussing such information. Consideration of such outside information
>
> also ensures that a program is individualized and provides a check on the judgments
>
> being made by school officials regarding the child. (Community Consolidated Sch. Dist.
>
> No. 180, 27 IDELR 1004, 1005-06)

Thus, lawmakers and the court systems accept and promote the importance of having

diverse team members work together to develop the student's program. Diverse teams are

supported in the literature as extant studies indicate the positive link between family and

professional engagement and collaboration (Blue-Banning et al., 2004; Epstein, 2018; Francis et

al., 2020; Haines et al., 2017). Therefore, all team members within the IEP team must create

solid and productive partnerships that value each other's expertise and input (Mueller & Vick,

2019). Characteristics of cooperative teams include individuals who engage in reciprocal,

interactive communication, demonstrate trust and respect for each team member's expertise, and

share responsibility for the student's well-being (Francis et al., 2020; Gershwin, 2020). Families,

schools, and neighboring communities that collaborate and create supportive, individualized

programming observe students who stay in school longer, have better attendance, earn higher

grades, demonstrate increased social skills, and increase involvement in post-secondary

academics and obtaining jobs (Barton, 2003; Francis et al., 2020; Henderson & Mapp, 2002).

Another beneficial outcome of strong FPPs is the creation of high-performing school systems

with corresponding characteristics, including effective leadership, research-based curriculum,

high-leverage practices, explicit instruction, increased professional development, and increased

community involvement (Henderson & Mapp, 2002; Riccomini et al., 2017). Interestingly,

although a myriad of positive outcomes are associated with developing and maintaining strong,

productive FPPs in IEP meetings, research indicates multiple barriers exist that restrict

collaboration and active participation during IEP meetings (Gershwin, 2020; Mueller, 2009).

Consequently, poor partnerships relate to higher rates of conflict resulting in mediation and due

process (Goldman & Burke, 2017). Understanding these barriers may aid teams in creating more

inclusive meeting environments.

<div align="center">**Barriers to Meaningful Collaboration**</div>

Extant research indicates common obstacles impeding family-professional interactions,

including limited voice, power imbalance, lack of cultural responsiveness, and mistrust (Francis

et al., 2020; Mueller, 2009; Mueller & Vick, 2019; Rossetti et al., 2017). Each of these barriers is

described in detail to provide context on how they might affect the FPP within the IEP meeting.

Limited Voice

Limited parent "voice" is one concept that appears consistently in research. In a survey

examining parent experiences and perceptions of attended IEP meetings, parents described the

IEP meetings as frustrating, overwhelming, disappointing, and anxiety-inducing (Zeitlin &

Curcic, 2014, p. 385). Ultimately, these obstacles created depersonalized meetings focused on paperwork and compliance rather than collaborative programming. Parents from multiple studies reported feeling lost due to a focus on confusing paperwork and team members' overuse of jargon (Rossetti et al., 2017; Zeitlin & Curcic, 2014). These results are consistent with other studies in which parents reported feeling school professionals view their role as passive and unimportant. In a study about fathers' unique experiences during IEP meetings, researchers Mueller and Buckley (2014) interviewed 20 fathers and found every one of the respondents reported feeling like outsiders even when they were active partners. One father noted,

> I absolutely feel like I'm the odd man out, and I'm talking a different language coming from a guy's point of view. . . . It's both in general and obviously it's more difficult because I'm not the one on the front lines. I think if I were the one that had the day-to-day relationship with the teachers, it might be different, but my wife has that . . . and so, I just kind of feel like a wart. (p. 43)

Team members may engage in behaviors that contribute to these feelings through their actions before and during meetings. Examples include coming to meetings with predetermined goals, completed (finalized) paperwork, and reading paperwork to families rather than having a discussion (Cavendish & Connor, 2018; Childre & Chambers, 2005). These claims are supported by findings that school staff dominates discussions during IEP meetings (Martin et al., 2006; Ruppar & Gaffney, 2011). Specifically, a study conducted by Martin et al. (2006) concluded that after observing 109 IEP meetings, special education teachers spoke 51% of the time compared to family members speaking only 15% of the time. Another study examining the content and notes from 66 students' IEPs and IEP meetings revealed that when parents provided their input, concerns, and programming priorities, this information was rarely translated into IEP paperwork

in a way that affected changes to the programming (Kurth et al., 2019). It is easy to see why parents report feeling excluded from the discussion and decision-making process during the IEP meeting (Gershwin, 2020).

Parent participation, voice, and engagement are deemed so critical that it is also identified and monitored through statutory guidance. Indicator 8: Parent Involvement of the State Performance Plan (SPP) is "the percent of parents with a child receiving special education services who report that schools facilitated parent involvement as a means of improving services and results for children with disabilities" (Office of Special Education Programs, 2018, p. 80). Unfortunately, the accountability metrics have been static, remaining between 58% to 65% from 2016 to 2018, indicating minimal changes in promoting parent involvement (Office of Special Education Programs, 2016, 2017, 2018). Readers should consider these statistics cautiously as states use a variety of methodologies and measures to determine performances. Thus, results may not be comparable. However, the range of percentages seems to suggest that by whatever metric being used, only slightly more than half of parents view schools as facilitating their involvement. In a study geared toward understanding dimensions that contribute to parents' perception of their involvement in the IEP process, Elbaum et al.(2016) found many respondents reported minimal instances where school personnel asked for parent input, were responsive to parent initiations, or considered parent suggestions to IEP services or accommodations. Powerful themes included "the school is rigid about choices provided," "teachers are not accessible," and "school does not involve parents about placement decisions" (p. 7).

Power Imbalance

The perception of exclusion significantly affects the feeling of power within a conversation. Over 20 years of research reveals parents feel significant power imbalances with

other IEP team members stemming from a lack of special education knowledge, opportunity for input, and invitations to communicate during IEP meetings (Deardorff & Yeager, 2021; Francis et al., 2020; Lake & Billingsley, 2000; Mueller & Buckley, 2014; Mueller & Vick, 2019). As mentioned, IDEA directs the IEP team to engage in an equal partnership with families; however, this has not always been translated to the actual experiences of family members during IEP meetings. In a study identifying perception of power, 929 mothers of students with disabilities responded to a question asking who they identified as holding the most power during IEP meetings. Their responses overwhelmingly indicated that they viewed the school administrator (49%) as holding the most power, followed by the teacher (17%), and the parent (16.5%) (Deardorff & Yeager, 2021).

Many parents reported feeling judged, accused, and intruded upon due to personal questions related to home and health. These perceptions are likely exacerbated by feelings of failure and devaluation based on the American social context of being a parent of a child with a disability as a deficit (Valle, 2018). In a narrative study by Valle (2018), one parent crystalized these feelings when she described her experience hearing her child's diagnosis,

> The first stages, as a mother, you're trying to take care of yourself emotionally in trying
>
> to deal with a child that maybe reflects on you not being as *good* as you should be to
>
> society. It's not that you *feel* that way but that's how society looks at you. You did
>
> something wrong. You're grieving and dealing with *all* these labels and all of these *guilt*
>
> feelings—right or wrong—that you have inside. (p 11)

Additionally, families reported feeling they must advocate for services causing a rift in school-family relationships (Deardorff & Yeager, 2021; Rossetti et al., 2017). Further, because the special education process is steeped in policy and procedure, staff may consider a successful

IEP meeting to be the competent completion of paperwork and the dissemination of information.

At the same time, the outcome for a parent is understanding and accessing support for their child.

While both are important, the family may leave having to deal with lingering emotions (Valle,

2018).

Lack of Cultural Responsiveness

Significant barriers to collaboration seem to be compounded when families are from

historically marginalized groups such as race, culture, language, and social class resulting in

parents feeling overwhelmed and unequal compared to educators (Harry, 2008). This is

intensified when families face additional barriers due to being refugee or immigrant families as

they may have additional challenges associated with trauma or cultural differences (Rossetti et

al., 2017). For the current project, the definition of people who are culturally and linguistically

diverse (CLD), used by Rossetti et al. (2017), was adopted and framed as "individuals whose

primary language is not English and /or who are not European American (Rossetti et al., 2017 p.

173). This category is not intended to be simple, as the population of students with disabilities

from CLD families is diverse and growing. Tran et al. (2018) reported that the number of

students from CLD families has grown by more than 300,000 over the past 10 years. Extant

studies bring to light the unique experiences CLD families encounter and navigate, spanning

from identifying a disability through adulthood. For example, Lovelace et al. (2018) reported that

African American children were more likely to be misdiagnosed or diagnosed late due to

families reporting symptoms such as late speech or behavior concerns rather than symptoms

related to an overarching disability such as autism spectrum disorder.

Staff actions that escalate negative experiences include stereotyping, being culturally and

religiously insensitive, using educational jargon, offering inappropriate accommodations related

to language, providing limited information about meetings, and demonstrating minimal respect

for family expertise (Harry, 2008; Jung, 2011; Rossetti et al., 2017). Various research studies

reported that negative perceptions held by educators created a chasm between parents and staff.

For example, Lo (2012) noted an underlying assumption that families should actively (and

vocally) participate in IEP discussions and when making educational decisions. However, these

value-laden practices were not always shared with families from other cultures. This expectation

may not be comfortable or be understood as a role on the team by all team members, thus

creating an unforeseen misunderstanding (Lo, 2012).

Rossetti et al. (2021) discussed differences in treatment and communication between staff

and families. For example, families from high socioeconomic systems are more likely to

communicate with IEP teams using jargon and referencing research related to the student's

disability. Furthermore, staff is more likely to share insider information with White families

related to the student's programming and disability than with Latinx, Black, and Native

American families. A study exploring Spanish-speaking and English-speaking parents

experiences with the IEP process during the COVID-19 pandemic identified linguistic barriers as

an obstacle to parent involvement and to their child receiving appropriate services. In essence,

non-English-speaking families were less likely to report a lapse in services (Alba et al., 2022).

Other marginalized families, such as those who are economically disadvantaged or live in rural

communities, reported challenges with limited internet connectivity and, thus, fewer

opportunities to attend virtual IEP meetings (Glessner & Johnson, 2020).

Mistrust

Trust between families and professionals has been defined as an essential, foundational

interaction found in mutually beneficial, reciprocal partnerships that share responsibility for a

common goal (Francis et al., 2016; Gershwin, 2020). In education, that goal is positive student outcomes. Common factors that erode trust among team members include communication breakdowns; misunderstandings due to complicated paperwork, procedures, and jargon; and the lack of perceived (or real) competence (Kyzar et al., 2019; Mueller & Buckley, 2014; Zeitlin & Curcic, 2014). If parents feel they have been coerced into a decision or not taken seriously, trust is eventually broken (Valle, 2011).

Exclusionary practices such as those previously described directly contribute to a lack of trust among team members, particularly between staff and parents. This, in turn, creates conflict (Gershwin, 2020; Lake & Billingsley, 2000). For example, in a recent case, *MC v. Antelope Valley Union High School District*, a procedural violation came to questioning parental participation. In this case, the IEP team, including the parent, met and agreed upon the IEP. However, a week after the team met, a staff member noted an error related to the service provisions and, rather than notifying the parent, unilaterally changed the service minutes without sending the parent notification of the change. As a result, the parent filed a due process complaint, and, subsequently, the case progressed to the Ninth Circuit Court, where the Court found the procedural error was likely to have caused a loss of educational benefit as the parent did not have the opportunity to participate in the formulation of the student's program (Yell et al., 2022). Experiences such as this and the barriers discussed create mistrust, which may result in conflict.

Special Education Conflict and Dispute Resolution

To ensure school districts follow appropriate and inclusive procedures when identifying, evaluating, and making educational decisions for a child with a suspected disability, Congress established a means for families and students to monitor and dispute decisions made by school

districts (Simon, 2018). If families do not believe the district has followed the procedures or if they disagree with the identification, evaluation, or placement of their child, formal dispute-resolution mechanisms can be accessed (Yell, 2015). These procedural safeguards provide guidance on how to formally disagree with a district's offer of FAPE. Families may pursue any of the three following formal dispute resolution options: (a) mediation (IDEA 34 CF R. § 300.506), (b) due process (IDEA 34 CF R. § 300.511), and (c) state complaint procedures (IDEA 34 CF R. § 300.151-153). Once a written complaint is filed, the parties must attend a resolution session within 15 days of the formal request unless both parties decline (in writing) to waive the meeting. This session is a meeting among all party members to work out a solution before filing the formal request for mediation or due process hearing (IDEA 34 CF R. §. 300.510).

Mediation

Mediation is a voluntary process where parents and districts meet with the assistance of a trained, impartial third-party party mediator to resolve disagreements. The state is responsible for any costs associated with the mediation and maintains and randomly assigns a mediator upon request. If an agreement is reached, both parties sign a binding written agreement (IDEA 34 CF R. § 300.506). Mediation can be requested at any time by either party. Still, it is often associated with the first step in resolution to avoid proceeding to a more formal method such as due process. In the 1997 reauthorization of IDEA, mediation was established as a choice when a due process hearing is requested to resolve before more formal procedures (Simon, 2018). Mediators do not decide on the outcome, but instead offer strategies and support to help parties work towards agreement; thus, they must be knowledgeable in laws and regulations relating to special education and trained in effective mediation techniques. This process is often considered less adversarial as the IEP team's goal is to work together to come to a resolution (Blackwell &

Blackwell, 2015; Mueller, 2009; Yell, 2015). National data indicate that mediation sessions averaged between 4,000 and 6,000 per year between 2009 and 2020 (CADRE, 2019b).

There are advantages associated with using mediation as a method for dispute resolution, particularly because of the focus on parties communicating effectively. To promote cooperation, some states discourage the use of attorneys in mediation sessions. However, having attorneys present can help even the playing field related to expertise in special education terms and processes (McMurtrey, 2016).

Due Process Hearing

Once a written complaint is filed and the parties have attended or waived a resolution meeting, the parties involved in the dispute have an opportunity to proceed to a due process hearing. The state or local agency is responsible for conducting this hearing. Mandatory components of this process include using a qualified hearing officer, and all issues must have been previously raised in the written complaint. The team has 30 days from the day the complaint is filed to reach an agreement and a 45-day timeline for the hearing officer's final decision. Also, a hearing must be requested within two years of the alleged action (IDEA 34 CF R. § 300.511).

A due process hearing is the most formal, legalistic, and adversarial of the dispute resolution options. Congress intentionally designed the process to be adversarial as they wanted to ensure both the parents and the school had the same opportunity to present their arguments (Cope-Kasten, 2013; Yell, 2015). As mentioned, an impartial third-party hearing officer hears both sides; considers the issues, testimony, and evidence presented by both sides; and then settles the dispute (Yell, 2015). Both parties are usually represented by an attorney and, thus, can become quite costly. According to Mueller et al. (2008), due process hearings are often unfair,

costly, time-consuming, emotionally draining, and typically cause more strain on the school-

parent partnership. Still, the use of due process to lodge and resolve complaints continues to be

the most widely used option, despite its adversarial nature, high cost, and tendency to decide in

favor of districts (Blackwell & Blackwell, 2015; Center for Appropriate Dispute Resolution in

Special Education [CADRE], 2019a; Karanxha & Zirkel, 2014). Karanxha and Zirkel (2014)

examined the frequency and outcomes of 809 published court decisions between 1998 and 2012.

Findings indicated districts prevailed in 59% of the cases. Mueller and Carranza (2011) reported

parents are more likely to initiate a due process hearing than districts. In the 2017-18 reporting

period, there were 20,014 due process hearing requests (nationally) (CADRE, 2019b). However,

fully adjudicated hearings resulted in 1,933 cases. Hearing officers can grant extensions beyond

the 45-day timeline, which can increase financial costs related to expert and attorney fees as well

as emotional costs to the family and educators. Most importantly, the student may experience

educational costs while the outcome is being decided (Cope-Kasten, 2013; Mueller & Carranza,

2011; Scanlon et al., 2018). Because this process has been reported as complex, emotional,

costly, and disproportionately in favor districts, it is recommended to be accessed only as a last

resort (Cope-Kasten, 2013; Karanxha & Zirkel, 2014; Mueller, 2017).

If possible, utilizing alternate dispute resolution (ADR) methods that promote

collaboration can aid in accomplishing two desired results, an agreement on the IEP and

bolstering or even repairing the team's working relationship (Scanlon et al., 2018). Research on

ADR processes has shown that participants are more satisfied with informal processes, such as

IEP facilitation, that help to repair relationships and encourage collaborative problem-solving.

(Cope-Kasten, 2013; Mueller, 2015). The CADRE, a nationally-funded technical assistance

center promoting the use of collaborative dispute resolution methods for resolving disagreements

between families and schools (About Us, 2015), acknowledges the need for a more cost-effective and less adversarial process and names FIEP as a promising method (CADRE, 2004; Mason & Goldman, 2017).

Alternate Dispute Resolution: The Facilitated Individualized Education Plan

As mentioned, the FIEP was created to address barriers present in conducting an IEP meeting where all members share equal responsibility for engaging in a collaborative, productive process to develop a student's IEP (Bellinger & Little, 2000; Little et al., 2013). By definition, the FIEP is a meeting guided by a trained facilitator who uses visual tools (e.g., agenda, outcomes, norms, parking lot, and graphic recording) and specific techniques (e.g., active listening, strategic questioning, refocusing on outcomes, enforcing process agreements, etc.) to enable teams to build and improve relationships, increase effective communication consistent with respect and understanding, focus the conversation on the needs of the student, resolve conflict, and ultimately reach consensus (Little & Little, 2018).

The facilitator promotes collective input from all team members to develop an IEP based on student strengths and weaknesses (CADRE, 2019a). Currently, 41 states are offering FIEP as an option to reduce the need for more formalized dispute resolution mechanisms (CADRE, 2019b; Mason & Goldman, 2017). A FIEP at the state level is provided at no cost to the family or district. While there are a variety of methods to request a state-level FIEP, most states have a request form requiring both parties (district and family) to agree to the meeting (CADRE, 2004; Mason & Goldman, 2017). When a FIEP is used as an ADR method, the meeting is conducted by a neutral facilitator who utilizes organizational tools to guide the discussion and collaboration strategies to promote full participation by all team members. The facilitator does not provide any content suggestions or recommendations related to the student's program. Rather, their role is to

guide the group through the agenda to reach agreed-upon outcomes for the meeting.

Additionally, the neutral facilitator employs specific conflict resolution techniques to help the

team reconcile their differences (CADRE, 2019a; Little et al., 2013; Mueller & Vick, 2019).

To date, research related to outcomes of state-level FIEP meetings is promising. In a

study conducted by Mason and Goldman (2017), findings indicated that all states who

participated in the study were satisfied with the FIEP process and outcomes of the meeting. In

another study by Goldman and Mason (2018), FIEP participant feedback was gathered related to

successful meeting outcomes and the perceived need for a more formal dispute resolution

process after attending the FIEP. Findings indicated that 94% of the meetings ended in either a

complete agreement or partial agreement, 44% indicated that the facilitation process reduced the

probability of other more formal processes needed, and 43% of the respondents agreed that the

relationship between the IEP team members was improved by the end of the meeting. Another

significant result of the study linked meeting participants' perception of the facilitator's skill level

to the success of the meeting. The facilitator's positive skill traits provided in the feedback

included remaining neutral, keeping the discussion focused on the student's strengths and

conversations centered on the purpose of the meeting, and creating a safe environment to share

information (Goldman & Mason, 2018). Acknowledging the role and impact of a trained

facilitator is essential when making decisions about implementing FIEP meetings, either at the

state or local level (Beck & DeSutter, 2020; Goldman & Mason, 2018; Mueller, 2009; Mueller &

Vick, 2019).

Facilitated Individualized Education
Plan: A Promising and
Preventative Practice

While FIEP meetings have gained attention as a valuable and effective ADR method, the concept is gaining popularity at the local level as an improved way to conduct collaborative IEP meetings (Beck & DeSutter, 2020; Mueller, 2009). In a study by Mueller and Vick (2019) investigating the experiences of 32 IEP team members who attended a FIEP meeting at the local level, respondents indicated overwhelmingly positive feedback related to the FIEP procedures and collaborative activities. Study participants shared that "these procedures transformed their FIEP meetings by creating a collaborative opportunity to talk through the IEP so that goals could be mutually designed, and any disagreements could be addressed, as needed" (p. 77). However, unlike the ADR FIEP meeting, in meetings where conflict was not present, the facilitator was a member of the IEP team and, thus, not neutral. Input from these dual-role facilitators (i.e., the special education teacher and facilitator) indicated that the specialized facilitator training applied to all IEP meetings and enhanced the typical meeting (Mueller & Vick, 2019). This is critical when considering the numerous barriers and negative experiences reported in typical IEP meetings as outlined in the previous section. Another outcome of the study by Mueller and Vick (2019) was the identification of five key procedural FIEP practices. These are: (a) premeeting with team members, (b) using an agenda, (c) using meeting norms, (d) using a parking lot, and (e) using visual charting tools. Additional studies support using these and similar FIEP tools and techniques to strengthen the FPP and ultimately affect positive outcomes for the student (Beck & DeSutter, 2020; Epstein, 2018; Mueller, 2009, 2019; Mueller & Vick, 2019).

Learning to Collaborate

When team members function collaboratively in a reciprocal relationship, positive outcomes are more likely achieved. For example, Mueller and Vick (2019) noted when IEP team members contribute equally to discussions about the student, conflict is reduced, and relationships are strengthened. In addition, other studies confirm effective IEP teams functioning as meaningful FPPs increase trust, efficacy, shared responsibility for student learning, and ultimately student achievement (Blue-Banning et al., 2004; Epstein, 2018; Francis et al., 2016; Haines et al., 2017; Mueller & Vick, 2019). Furthermore, when teams collaborate effectively, student success increases, attendance improves, and negative behaviors are reduced (Mereoiu et al., 2016). Therefore, it is crucial to foster teams that value each other's expertise and understand the value of working with one another.

Epstein (2018) supported this concept through the definition of the professional teacher as one "who understands that education is the shared responsibility of home, school and community" (p. 401) and community members as "professionals across departments and outside school walls" (p. 403). In addition, Lindsay et al. (2018) reported an increase in successful transitions from school to post-secondary activities because of increased family-school communication and engagement. The importance of team interconnectedness is emphasized by promoting the need for coordinated services and time to connect with other professionals to "make sure everyone has the most helpful, accurate, and up-to-date information about opportunities" (Lindsay et al., 2018, p. 282).

Basham et al.(2010) focused on collaborating effectively to develop accessible and authentic curricular experiences that enhanced and ensured student transition to other environments. Additionally, the IEP team's focus on designing individualized, appropriate, and

valuable instructional as well as physical accommodations is an example of how productive, reciprocal interactions within the IEP team provide essential insights to the FPP in developing a program that addresses the student needs (Basham et al., 2010).

Research conducted during the COVID-19 pandemic punctuates the need for effective collaboration. Because communities were forced to shift methods of communication and collaboration, some communication methods improved for family professional relationships. These included establishing, training, and supporting new and unique communication methods (teleconferencing, learning platforms, etc.), increasing opportunities to communicate (educational check-in, support with home learning, and virtual IEP meetings), and developing flexible meeting times and locations (IEP meetings conducted from home or work via teleconferencing platforms) (Glessner & Johnson, 2020; Steed et al., 2021).

Conclusion

As mentioned in the introduction, there is limited pre-service and licensed teacher training that explicitly instructs how to conduct productive, collaborative IEP meetings, even though numerous studies indicate the need for this guidance (Beck & DeSutter, 2020; Mueller & Vick, 2019). This chapter provided evidence of the need for strong FPPs as they function in the IEP team capacity. In addition, the information suggested the need for future research focusing on implementing FIEP meetings to combat barriers found in IEP meetings and promote focused productive team collaboration. Many educators need specialized instruction on conducting effective IEP meetings (Beck & DeSutter, 2020; Mueller & Vick, 2019). Therefore, it is critical to identify programs that address this deficit.

One study identified a specific FIEP training as quality training that successfully prepares educators to work collaboratively with their colleagues and families, implement conflict

resolution techniques, and follow a productive process (Mueller & Wagner, 2017). However, a limitation of the study was the lack of identifying the specific activities that promoted educator competence and confidence in the skills acquired. In addition, it would be beneficial to know if the tools and techniques remained valuable and practical to implement over time. To gather this information, I sought to capture participants' lived experiences who attended this FIEP training and implemented techniques learned. A deep understanding of the participants' experiences adds to productive IEP meeting practice and policy. This study adds to this very limited research.

CHAPTER III

METHODOLOGY

Purpose of Study

The purpose of this study was to investigate the experiences and perceptions of educators who attended the FIEP CPR training and identify associated outcomes experienced during a meeting once the trained educators implemented tools and techniques from the training. As noted in various studies, it is critical that training is devised to provide educators with the necessary knowledge and skills to foster meaningful FPPs and conduct collaborative IEP meetings (Beck & DeSutter, 2020; Kyzar et al., 2019; Mueller & Vick, 2019). Therefore, through this qualitative, phenomenological research study, I gathered data specific to the participants' experiences with the FIEP training, how they transferred their knowledge into practice, and what specific techniques they found most useful upon application. This information deepened my understanding of the training techniques educators believed were most effective in their learning and the specific techniques and tools educators found to be successful in improving the IEP process.

Exploratory Research Questions

The research questions for this study focused on exploring how a group of licensed educators viewed their learning experience and, ultimately, their confidence in utilizing facilitative behaviors to conduct IEP meetings after participating in the FIEP CPR training.

Q1   What are the experiences of licensed educators who participated in the FIEP CPR training?

Q2   How does the experience of the training inform or shape the participants' outcomes of the IEP meetings?

Research Question 1

This question addressed the participants' experiences and perceptions of the FIEP CPR training. This question provided insight into participants' perceptions of the training activity's strengths and weaknesses. The participants had specific examples of what furthered or hindered their growth. In addition, any improvements could be made to address issues they are faced with when running an IEP meeting. Using strategic, semi-structured open-ended interview questions, I probed for instances that provided effective instruction and practice as well as specific activities that aided them in feeling confident and competent in conducting a collaborative FIEP meeting. This question helped attain the larger goal of this study to have a deeper understanding of effective training activities used in FIEP training to promote educator ability, confidence, and competence in FIEP implementation and collaboration with FPPs.

Research Question 2

Question 2 provided an opportunity to explore the participants' experiences implementing the facilitation strategies, tools, and techniques after the training. The semi-structured open-ended interview questions elicited rich descriptions of how certain tools or techniques increased collaborative problem-solving, meeting structures, participation, and understanding of the IEP process and student strengths and challenges as well as the student's individualized programming. This question helped to identify and confirm common effective facilitative tools found in this and similar studies.

<div align="center">

Research Design

</div>

Qualitative research concentrates on understanding participants' experiences, attitudes, opinions, and beliefs, constructing their knowledge, and the meaning they assign to these

experiences (Brantlinger et al., 2005; Merriam & Tisdell, 2016). For this study, the approach focused on the experiences of licensed educators during and after attending the FIEP CPR training. Creswell and Creswell (2018) described qualitative research as a design to explain behavior and attitudes through an inquiry process of understanding a social or human problem. Furthermore, qualitative design is recommended for studies that seek to discover variables and relationships to generate theories and models to uncover causes and pathways to possible outcomes (Remler & Van Ryzin, 2011). Merriam and Tisdell (2016) stated that "research focused on discovery, insight and understanding from the perspectives of those being studied offers the greatest promise of making a difference in people's lives" (p. 134). Thus, using a qualitative research design allowed me to uncover and understand the perspectives and phenomena experienced by licensed educators to obtain critical information related to preparing educators to conduct effective IEP meetings. This approach also shaped many aspects of the research design process, such as the research questions, the data collection, and data analysis (Creswell & Creswell, 2018).

When constructing a qualitative design, the researcher must be aware of critical characteristics including collecting data within the natural setting, utilizing the researcher as a key instrument, employing multiple methods, organizing data inductively, reflecting diverse perspectives and meanings, acknowledging context, having an emergent design, and maintaining reflexivity (Creswell & Creswell, 2018). Qualitative researchers commit to collecting data in a natural setting. Rather than using instruments such as a survey or contriving the setting, the researcher seeks to interact with the participant within their environment using multiple data collection methods such as interview, observation, and document examination.

When collecting the data, the researcher becomes the key instrument in data collection. Because the researcher is closely involved with the process, it is essential that they disclose their background and how it informs the study. The researcher organizes the data inductively through this process, shaping themes as they emerge from the data. This relies heavily on the researcher's deductive thinking and logic. While interacting with the participants, multiple perspectives and meanings emerge. The researcher must acknowledge these viewpoints as an essential part of the study.

Similarly, the context or setting in which the participant lives or works shall be appreciated for its unique influence on the participant's experiences. This includes social, political, cultural, and historical elements. Finally, because the design is emergent, the researcher must be flexible, allowing for shifts once data collection begins. This is one of the reasons the use of semi-structured research questions was essential. For example, interview questions may gradually develop as the conversation occurs and information is presented (Creswell & Creswell, 2018). Researchers bring certain philosophical assumptions to their research that inform the direction of the research goals and outcomes. Once the researcher identifies their philosophy, formulating the research problem, research questions, and inquiry process becomes more evident.

Phenomenology: Constructivism

The theoretical framework for this study was phenomenological which focuses on the lived experiences of participants (Neubauer et al., 2019). This is in line with constructivist John Dewy who proclaimed that learning occurs through linking experiences and situations. He felt so strongly about this learning theory that he recommended students' interests and experiences inform educational lessons and classroom design (Nathan & Sawyer, 2014). Crotty (1998)

described the constructivist philosophy as the belief that meaning emerges from humans' conscious engagement with the world and that this meaning is useful, liberating, meaningful, and rewarding. Turnbull et al. (2022) added social constructivists intend to understand why actions occur when individuals interact.

Philosophically, I believe that we learn best through our interactions with others or the world in general, developing understanding through lived experiences. Creswell and Creswell (2018) described philosophical assumptions as a worldview or "a basic set of beliefs that guide action" (p. 28). In planning this study, I pondered the philosophical worldview I brought to the study based on my professional experiences, interest in specific areas of study, and my reading of the research literature.

As a researcher, I sought to better understand the world in which I live and work. Creswell and Poth (2018) recommended conducting a phenomenological study when the researcher intends to develop a composite description of a lived experience and interpret its meaning through the development of common themes. Therefore, to develop a true understanding of the phenomenon, it was critical to acknowledge and consider the complexities of multiple perspectives and experiences and to consider including the historical and cultural characteristics of the study participants (Creswell & Creswell, 2018). Using a phenomenological approach and social constructivist framework, I conducted in-depth, semi-structured interviews to delve into the lived experiences of team members who participated in the FIEP CPR training over the past three years. The interview questions posed to participants remained broad and open-ended to enable the researcher to listen to the participant's views and construct meaning from their lived experiences. Creating broad questions allowed me to develop a theory inductively, building and shaping patterns and themes through the research process.

Interview Methodology

Interview methodology is one form of data collection used in qualitative research design that provides rich, relevant insights into the study's purpose (DeMarrais & Lapan, 2004). In phenomenological studies, in-depth interviews are the primary form of data collection. The interaction between the researcher and study participants is the principal method for acquiring information, particularly when interested in understanding the lived experiences of the research participants (Creswell & Creswell, 2018; Creswell & Poth, 2018; Merriam & Tisdell, 2016). Interview methodology can be categorized into three distinct categories--highly structured, semi-structured, and unstructured interviews. Highly structured interviews contain predetermined wording and the order of the research questions. This type of interview can be likened to an oral survey requiring the interviewer to deliver questions to each respondent in the same order and manner, allowing for no flexibility or probing questions. Semi-structured interviews are more flexible. While they contain predetermined questions, the interviewer probes the participant with open-ended questions and encourages a natural flow to the conversation. The unstructured interview does not use established questions. Instead, the interviewer asks open-ended questions based on the topic, promoting a conversational tone (Merriam & Tisdell, 2016).

Because this study was based on a constructivist phenomenological approach, I selected the semi-structured interview format. Creswell and Poth (2018) recommended the interview questions remain broad and open-ended to enable the researcher to listen attentively to the participant, constructing meaning from their accounts and probing further when appropriate. This flexibility within the interview allowed the respondents to share their thoughts informally and expand their responses (Lochmiller, 2019). Once the purpose of the study was determined and research questions were constructed, a thorough interview process was constructed using the

following steps: (1) identify the participants, (2) determine the suitable type of interview (structured, semi-structured, or unstructured), (3) consider any ethical issues, (4) plan logistical aspects (location or method, appropriate and reliable recording device, etc.), (5) design the interview protocol, and (6) pilot the questions (Castillo-Montoya, 2016; Creswell & Poth, 2018; DeJonckheere & Vaughn, 2019).

Using a semi-structured interview method enabled me to gather rich, thick descriptions of the educator's perspectives and perceptions related to their thoughts, beliefs, and experiences about the FIEP CPR training activities, and the usability of the tools and outcomes related to the educator's new practices (Creswell & Poth, 2018; DeJonckheere & Vaughn, 2019). This was integral in genuinely understanding their lived experiences and, in turn, using that information to develop relevant themes.

Researcher's Stance

Researcher reflexivity is the qualitative practice where the researcher considers their biases, values and personal background related to the study. Because the researcher is regarded as the key instrument in the collection of data, they must identify these beliefs and experiences up front so that the researcher can think reflexively and honestly about their ownership in shaping the study and interpretation of the phenomena (Creswell & Creswell, 2018; Merriam & Tisdell, 2016). Creswell and Poth (2018) compelled the writer to ensure "all writing is 'positioned' and within a stance" (p. 366), meaning the researcher must describe, in detail, their biases, and experiences or lack of experiences they may bring to the study, particularly when using a methodology that involves close contact with the participants.

Merriam and Tisdell (2016) emphasized the importance of using reflexivity and stance to better understand the relationships between the researcher or "self" and the participants/audience

or "others." The authors expand these concepts by describing the value of the insider/outsider stance in developing trust with the participants. For example, because I have been a special educator, the study participants may have considered me an insider and felt compelled to share more details with me due to our common careers. On the other hand, because I am a parent of a child with disabilities, some educators may have felt I was an outsider and answered interview questions more conservatively. Groenewald (2018) stated, "Phenomenologists . . . believe that the researcher cannot be detached from his/her own presuppositions and that the researcher should not pretend otherwise" (p. 45). Mortari (2015) ensured that taking the time to outline any possible relationships and power dynamics enables the researcher to legitimize and validate the research procedures. Neubauer et al. (2019) made another important point practiced in hermeneutic phenomenology which acknowledges the role of the researcher in the inquiry. Rather than bracketing the researcher's expertise, this knowledge guides the study in investigating the lived experiences, reflecting on emerging themes and simultaneously reflecting on their own experiences. Below I have described my stance related to the intertwining of the researcher, parent, educator, participant, trainer, and now, the owner.

Parent

Having a child with a disability provides many unique insights into the special education experience. My son is now an adult with a disability which means I attended over 20 years of IEP meetings as a parent. During this time, I experienced meetings that were organized and conducted with varied approaches. Some were conversational, some were organized, and others were disorganized. There were times that I noticed team members who did not seem to know my son, who did not participate in the discussion, and who visibly did not want to be there but attended due to legal obligations. In contrast, there were meetings where every member was

active in the discussion, focused on developing a complete program, and excited to learn about my son's unique needs related to their role on his special education team.

As a parent who is also a trained special educator, I experienced differing levels of respect and inclusion from different team members. I felt fortunate to understand the intent of the IEP meeting and, at times, the respect of team members in valuing my suggestions for programming. However, there were also meetings where I was told to let my son's school team make the decisions, leaving me feeling shut out and unwelcome. With these examples in mind, it is clear that I brought strong memories, beliefs, and values based on my experiences attending IEP meetings as a parent to this study.

Licensed Special Education Teacher

For over 30 years, I conducted and attended copious IEP meetings as a special education teacher. Unfortunately, I received no formal training until very late in my career, thus developing my craft through observation, trial, and error. Due to my close relationship with all team members, including the student's parents, most IEP meetings were pleasant and resulted in positive outcomes. However, because I did not truly understand the process for conducting a collaborative and compliant meeting, I remorsefully acknowledge the numerous programs that we, as a team, developed that may not have genuinely met all the needs of the students. After receiving the formal training, I was elated and took multiple measures to implement and practice the skills, tools, and techniques that would create a conversational, collaborative, and compliant meeting. However, I acknowledge this was my experience, not necessarily the experience, attitude, or behaviors of all training participants.

Licensed Special Education
Administrator

I attended the training selected for this study when I was a special education

administrator. As the local education agency representative and the district special education

administrator, I regularly attended or ran high-profile meetings when the teams were

experiencing conflict. Before the training, these meetings were commonly riddled with negative

practices such as disrespectful or devaluing behaviors, long meeting durations or multiple

sessions for the same meeting, lack of preparation, use of jargon, off-topic conversations, chaotic

processes (e.g., team members entering and leaving the meeting at different times),

disproportionate participation, decisions based on the needs of the team members rather than the

student needs, etc. However, after learning and implementing the tools and techniques from the

training, I experienced an immediate and positive change in many of the mentioned issues. Based

on this, I formulated a strategic professional development plan to have every case manager,

school psychologist, speech pathologist, and site administrator trained to facilitate meetings.

Additionally, I offered stakeholder training for parents and auxiliary team members (e.g.,

additional related service providers, advocates, attorneys, community members, etc.) to ensure

all IEP meetings were facilitated with an organized, collaborative, and guided process. This

change took three years but resulted in less conflict, a marked decrease in due process filings,

and an increase in collaboration.

Trainer and Co-owner of the
Company that Provides
the Training

A year after my initial training experience, I contacted the company owners and became a

part-time trainer while continuing my position as an administrator. This opportunity increased

my proficiency and punctuated my enthusiasm. It also allowed me to connect with special

educators across the nation, hear their experiences, and provide them with support, coaching, and training in the facilitation process. Ten years later, I acquired the business from the original owners allowing me to update any content or activities to ensure the training continues to meet the needs of present-day IEP teams.

I was fortunate that I could attend multiple trainings and foster my skills through teaching the content and repetition of the content. However, that is not the typical professional development opportunity for licensed educators. Thus, through this study, I gained an understanding and insight into the perceptions and experiences of the typical attendee. As a co-owner, the information gained from the data analysis helped to promote skill acquisition and identify and adapt any activities or content that required change. These experiences, coupled with my beliefs and values related to special education, are closely enmeshed with the research process and the participants' perceptions. As intended, in phenomenological studies, the inevitable integration between researcher and subject helped to evolve an understanding of the phenomenon and foster a rich study. I also kept a reflexive journal throughout the study which promoted reflection related to interactions with participants and the development of the theories (Creswell & Poth, 2018).

Participants

After approval from the Institutional Review Board (Appendix A), purposeful, snowball sampling was used to identify licensed special education personnel who met the inclusion criteria. Alase (2017) identified this method as one that provides the researcher the opportunity to gather information-rich data related to the phenomena. The author noted, "Eliciting a homogenous sample group aided in understanding the overall perceptions among the participant's lived experiences" (p. 13). Merriam and Tisdell (2016) deemed purposeful sampling

appropriate when the researchers want to "discover, understand and gain insight and therefore must select a sample from which the most can be learned" (p. 96). In this study, purposeful, sampling increased the probability for obtaining a homogenous sample group. Snowball sampling occurred as a method to address the limited response return upon initial recruitment.

Inclusionary and Exclusionary Criteria

In order to ensure the inclusion and exclusion criteria directly related to the purpose of the study, attendance in the training and implementation of the methods after the training, were part of the inclusion and exclusion criteria. The definition of special education personnel for this study included special education teachers, related service providers, school psychologists, and site or district-level administrators. To be included in this study, all special education personnel were over 18 years of age and met the following criteria: (a) were current, active educators in public or charter school districts; (b) had received training from trainers other than myself and have not had communicated with me related to business operations (e.g., contract development or scheduling training); (c) had completed the in-person or online IEP facilitation course between one and three year prior to the study; (d) had facilitated a minimum of two meetings using facilitation techniques learned from the training); and (e) had provided consent to participate in the study.

Participant Recruitment

Following Institutional Review Board (IRB) approval, the process for gathering participants included first identifying a list of possible candidates based on the listed criteria. The information was collected from training registration sheets maintained on the Customer Relationship Management (CRM) software, which captures the name and emails of all trainings. Because I am a co-owner of the business, I had full access to this list. Clients were not surprised

by the email contacting them as all training participants were informed before and during the training that we maintain client records and will intermittently contact them to check on their implementation status and offer them updated training information. Within the CRM program, I was able to sort training candidates by training completion date, and trainer's names to control for two inclusion criteria: (a) participants had received training from trainers other than myself and (b) participants completed the in-person or online IEP facilitation course between one and three year prior to the study.

When determining the number of candidates to recruit, I relied on recommendations from qualitative research literature for achieving the "gold standard" for saturation or collecting data until no new concepts or themes emerge (Mthuli et al., 2021; van Rijnsoever, 2017). Many researchers and guides in qualitative research recommend a study to include anywhere between 3 to 20 participants explaining that flexibility in the sampling number is crucial for collecting more participants if needed to reach saturation (Alase, 2017; Creswell & Creswell, 2018; Merriam & Tisdell, 2016; van Rijnsoever, 2017). Thus, factoring in the probability of non-responses and potential exclusion, I emailed 35 candidates the initial recruitment email. The correspondence described the study's purpose, and procedures and clarified that the research project was voluntary, and that the participant could withdraw at any point without explanation (see Appendix B). Interested participants were prompted to click on an embedded link to answer demographic information and the rest of the inclusionary questions described above. The questionnaire ensured respondents fit the criteria to participate in the study. If the participant answered "no" to any of the inclusion criteria, the survey automatically skipped to the end where participants were thanked for their time. If the participant answered "yes" to all the survey questions, they were automatically forwarded to the demographic section and informed consent

checkbox. The survey then notified the respondent that they would receive an email to set up a day and time for the interview (see Appendix D). All candidates who answered the survey fit the criteria, thus no respondents were eliminated from the study. If there was no response to the email, the candidate was emailed a follow-up email (see Appendix C).

Because I started the recruitment procedure during the summer, I found that many educators were not accessible. Therefore, two follow-up emails were sent after the start of the school year (see Appendix C). In addition, I contacted the director or other participants to ask for additional names and contact information to increase my pool of potential candidates. This snowball sampling strategy resulted in an increased response rate. All email exchanges were stored on a password-protected computer device. Of the 35 individuals contacted, 11 responded, indicating interest in the study. All 11 fit the criteria for participation and were included in the study sample. Demographics were gathered from their completed surveys.

All respondents received the face to face training prior to COVID. Six participants completed the training one year ago, three completed it two years ago and the final three completed it three years ago. While there was a variability in trainers, the content and process of the training remained the same. All trainers attend a trainer-for- trainer course that provides systematic instruction to ensure content mastery, required presentation and activity procedures, and the required learning space design. Trainers receive certification after demonstrating mastery in setting up the training environment and conducting the training with integrity and fidelity. All were female and had between 8 and 35 years of experience in the educational field. Eight of the 11 participants identified as being Caucasian, with one identifying as being Caucasian/Latina. One participant identified her race as Asian and another as "other." Participants varied in current positions including four special education teachers, two administrators, two school

psychologists, a program specialist, a speech pathologist, and a social worker. Nine of the

participants had graduate-level degrees, and two had bachelor's degrees.

The number of meetings facilitated varied greatly; participants reported having facilitated

as few as 5 meetings and as many as 600. The respondent who answered 600 noted that her

district had committed to her facilitating all meetings for the last three years and that as a school

psychologist, she facilitated meetings across multiple campuses. The majority of respondents

estimated facilitating between 25 and 50 meetings between their training experience and the time

of the interview. Eight of the 11 participants identified their school district as suburban, and two

indicated that their district was rural. Only one identified as teaching in an urban district. Table

one provides demographic information for each participant including the participant's unique

identification number, role in the district, years of experience, meetings facilitated, highest level

of education, race/ethnicity, district setting, and geographic location.

Table 1

Demographic Information

Participant	Role in District	Years of Experience	Meetings Facilitated	Highest Level of Education	Race/ Ethnicity	District Setting	Geographic Location
1	Special education teacher	13	8	Masters	Caucasian	Suburban	Midwestern state
2	Speech pathologist	18	50+	Masters	Caucasian	Suburban	Midwestern state
3	Special education teacher	22	5	Bachelors	Caucasian	Rural	Midwestern state
4	Special education teacher	22?	5	Masters	Caucasian	Rural	Midwestern state
5	Social worker	14	30+	Masters	Other	Suburban	Midwestern state
6	Special education teacher	8	15	Bachelors	Caucasian	Suburban	Midwestern state
7	Special education teacher/HS	23	30-40	Bachelors	Caucasian	Suburban	Midwestern state
8	School psychologist	10	600	Masters	Caucasian	Suburban	Southwestern state
9	School psychologist	17	25	Doctorate	Caucasian/ Latina	Urban	Southwestern state
10	Director of special education	35	50	Masters	Caucasian	Suburban	Southwestern state
11	Program specialist	8	5	Masters	Asian	Suburban	Southwestern state

Ethical Assurances for Participants

As a researcher, it was my responsibility is to consider ethical components when designing and conducting the study; therefore, a descriptive consent form was attached to the initial recruitment email to ensure participants understood the potential risks and benefits associated with the study (see Appendix C) (Creswell & Creswell, 2018; Merriam & Tisdell, 2016). In addition, before constructing research documents (e.g., research descriptions, recruitment emails, demographic questions, and the interview protocol), it was important to anticipate possible ethical issues. To do this, I prepared all research instruments keeping in mind three main principles: respect, beneficence, and justice (Remler & Van Ryzin, 2011).

To ensure respectful recruitment, the study description and informed consent included details about the researcher, the participant's role in the study, the right to withdraw from the study, the data collection process, and confidentiality protection (Creswell & Poth, 2018). Providing written information to the participant ensured they understood the context of the study, what the study entailed, and that their participation was voluntary without coercion or penalty (Alase, 2017). Confidentiality, protecting the identity of the participants, and ensuring the security of information were critical ethical factors to address and monitor throughout the study (Merriam & Tisdell, 2016). In this study, pseudonyms were assigned to conceal the identity of participants. In addition, all other identifying information such as the name of the school, district, county, town, or city was removed. To ensure the adequate safekeeping of the data, all collected information was stored in a locked password-protected computer program accessible by the researcher and second coder. Raw data, including audiotapes and transcription text, will be kept for three years after the completion of the study, and then will be permanently deleted for the protection of the participants (Alase, 2017).

Beneficence ensures that the participants are not harmed during or as a result of the study and that they should gain some benefit from the research (Remler & Van Ryzin, 2011). Because the study was voluntary and used pseudonyms, there were no foreseeable risks for participants. Multiple participants reported that they were glad to have participated in the study as it reminded them of tools and techniques that they had forgotten or wanted to brush up on. Thus, a direct benefit to the participants regarding this study was the opportunity to reflect on the training activities and skills learned. The findings benefit special education practitioners and researchers as a whole by better understanding the experiences of the participants who attended the IEP CPR training and their perception of useful facilitation tools and techniques. Further, this study

contributes to an expansion of the literature about this emerging practice. Finally, to address

justice through equity and fairness in the recruitment and treatment of subjects, participants were

recruited based on the purpose of the study rather than from convenience (Remler & Van Ryzin,

2011). Specific inclusion and exclusion criteria outlined in this study were followed in the

enlistment of the subjects (Creswell & Poth, 2018). Additionally, it was essential to ensure no

one group, or participant benefited or was more burdened than another. Receiving approval of all

study documents from the University's IRB ensured these ethical considerations were met

(Appendices A-G).

Data Collection Procedures

Interview Data

Ten of the eleven interviews were conducted by zoom and one via phone based on

participant request. The interview sessions lasted between 22.37 and 49.47 minutes. The average

interview was approximately 30 minutes. Interviews were audio taped with an external recording

device for transcription purposes. Qualitative research promotes an in-depth understanding of a

phenomenon (Brantlinger et al., 2005; Creswell & Poth, 2018). A well-constructed interview

delivers rich, focused, meaningful data permitting deep exploration into the meanings of the

lived experiences (Castillo-Montoya, 2016). Therefore, it was important to develop a sound

semi-structured interview protocol that enabled me to thoroughly examine the phenomenon and

remain focused on the purpose and desired outcomes of the study. Research guides on

conducting effective interviews suggested steps to consider, such as how to best: (a) select

participants; (b) establish the time; (c) gain trust and build rapport; (d) finalize the order, quality,

and clarity of the interview questions; and (e) establish the process of conducting the interview

(Creswell & Poth, 2018). Not only did I use these suggestions when developing the protocol, but

I also used Castillo-Montoya's (2016) Interview Protocol Refinement framework (IPR) to develop an interview protocol that gathered strong, reliable data. The four-phase process of the IPR framework included: (a) aligning interview questions with the research questions, (b) constructing inquiry-based questions, (c) eliciting feedback on protocols, and (d) piloting the protocol.

The interview protocol for this study was developed using recommendations from Creswell and Poth's (2018) research text, Castillo-Montoya's (2016) IPR, and the researcher's previous experiences developing and conducting interview protocols. The final interview protocol provided a flexible guide and addressed the following concepts: (a) overall perceptions and experiences related to the IEP CPR training; (b) IEP meeting processes before the training; (c) IEP meeting processes after the training; and (d) reflections on facilitative strategies, tools, or techniques they use from the training (see Appendix F).

**Aligning Interview Questions with
the Research Question**

The interview questions for this study consisted of semi-structured, open-ended questions. The questions were structured to probe and explore the participant's feelings, experiences, and perceptions of the IEP CPR facilitation training activities as well as associated outcomes experienced during meetings, where the trained educators implemented tools and techniques from the training. The interview questions evolved from foundational questions to inquiry-based questions probing to better understand participants' perspectives and experiences (Castillo-Montoya, 2016; Patton, 2015).

**Constructing an Inquiry-Based
Conversation**

Because the interview questions acted as the conduit to achieve understanding, they were

constructed in a common, clear format avoiding complex structure or jargon. Additionally, the

questions contained specific probes to avoid overwhelming the participant with broad topics and

to encourage detailed descriptions (Castillo-Montoya, 2016; Creswell & Poth, 2018). To ensure

the questions were inquiry-based, I infused social rules of conversation into the questions,

meaning asking questions relevant to the interviewee based on their experiences. For example,

the first question asked about their overall impression of the training including any examples of

aspects of the training that stood out to them. Because the inclusion criteria required participants

to attend the training in the past three years, the question was bounded by a period they could

recall. Other strategies to ensure the interview was conversational and informative included

describing the interview process, asking one question at a time, allowing time for the interviewee

to answer without interruption, and being aware of the participant's tone to alert any need for

clarification or reframing (Castillo-Montoya, 2016). Thus, the protocol included four types of

questions: introductory questions (general, non-threatening questions to start the conversation),

transition questions (linking the introductory question to key questions), key questions (related to

the purpose of the study), and closing questions (signaling an end to the interview and

stimulating final thoughts) (Castillo-Montoya, 2016).

To ensure my protocol was thoughtful and organized, I scripted the introduction,

transitions between questions, and potential follow-up questions. Based on previous experiences

interviewing study participants, scripting aided with keeping focused while also planning for

deeper conversations. In addition, having possible probes allowed for intentional flexibility.

Once the protocol was developed, I asked for input from my dissertation committee and individuals who had a deep understanding of the purpose of the study (i.e., trainers, other participants, etc.) but were not participating in the study. In addition, I asked for feedback on protocol structure, length, comprehension, and style. This process, including feedback from the committee, helped me to reevaluate interview questions and revise them to increase clarity and illicit richer responses. In turn, this increased the reliability and trustworthiness of the data (Castillo-Montoya, 2016).

Piloting the Interview Protocol

The final phase of the IPR was to pilot the interview protocol. In previous studies, I skipped this step and regretted it immediately. The first interview set the foundation for all future interviews (Castillo-Montoya, 2016). Piloting the first interview, provided insight into the subtle nuances of interviewing, such as pacing, phrasing, need for clarification, managing data collection materials (audiotape, teleconferencing system, field notes, etc.), and estimating the length of the interview sessions. I piloted my interview with a colleague who did not join the study but who had specific knowledge of the content and was able to provide me with helpful feedback. For example, during the pilot, when the participant did not provide clarity in the answer, I found it critical to restate the question to elicit more information in their own words. When reviewing the transcript from the pilot interview, I noticed that I paraphrased the participant's words to ensure I understood their meaning. However, upon reflection, this did not provide me with rich, descriptive data in the participants' own words. Therefore, in subsequent interviews I made sure to ask open ended questions starting with phrases such as "tell me more about" or "can you describe".

Data Analysis

According to Creswell and Poth (2018), data analysis involves "organizing the data, conducting a preliminary read-through of the database, coding and organizing themes, representing the data, and forming an interpretation of them" (p. 302). Additionally, quality data analysis includes results backed with rationale and documentation of methods and evidence substantiated through participant quotes (Brantlinger et al., 2005). In this study, I used three sources of data interview transcripts, journaling, and field notes each will be described below.

The interview transcript analyses followed three overarching steps: data preparation, data identification, and data manipulation. This was a cyclical and iterative process. Data preparation involved transcribing each audio-taped interview verbatim using a well-known transcription company. Once transcriptions were finalized, I listened to each interview while reading the transcripts to correct any inaccurate wording and redact identifying information. This step was critical in ensuring accuracy. For example, Participant six's transcript was very choppy with multiple interruptions. Being able to re-listen to the recorded interview while comparing it to the transcript provided an opportunity for clarity and as a result more accurate coding. In addition, listening to and reviewing the transcripts also helped to gain a feeling of the data and frame overarching findings. When ideas or themes emerged, I added my thoughts to the bottom of each corresponding interview field note as well as in the document margin.

The data identification phase occurred simultaneously as well as after the data preparation phase. As I read through each transcript, when an important concept, word, or theme was found, I assigned "open code" within the margins of the document using the "comment" feature of Microsoft Word. This process enabled me to break the data into discrete parts. In

qualitative research, this is considered open coding which is a fluid process "opening" the researcher up to developing theories (Merriam & Tisdell, 2016; Oliveria et al., 2015).

Simultaneously, peer debriefing was conducted by my research advisor who is an expert in the field of special education, teacher preparation, and implementing IEP facilitation techniques. She read all transcripts and created an independent coding list. After that, we met on zoom, shared the screen, and thoroughly reviewed and discussed the thought process and meaning of each open code. After rigorous discussion, we agreed upon an initial list of categories and themes.

Next, I began axial coding to further explore and refine the themes. Axial coding occurred by reviewing the open codes, identifying relationships, and grouping them into categories (Merriam & Tisdell, 2016; Oliveria et al., 2015). By grouping open codes into categories with repetitive concepts, I began to make connections between the open codes and organize the data into similar themes. A code list was developed on a word document to help organize and keep track of the categories and codes. When a new code emerged that didn't fit into the initial category or themes, the code was added and highlighted as a reminder that this was an iteration to discuss with my peer debriefer/advisor and to consider during the ongoing review. As the categories and themes became more constant, a column was added to the code list for quotes that supported or emphasized each category and theme to the list. The codebook was reviewed periodically to build interpretation and understanding of the phenomenon (Saldaña, 2013). Once the axial codes were determined, I met again with my peer debriefer to review and reorganize the existing categories and themes. This occurred one more time to flush out any overlapping themes.

Field Notes

Field notes were created to capture audible and physical observations, interviewer reflections on meanings and impressions, as well as the research process. Deggs and Hernandez (2018) described various types of field notes including direct observations, inference notes relating to social relationships or emotions, analytic notes reflecting theory, interview notes about the interview and interviewee, and personal journal notes reflecting personal feelings, emotions, and reactions related to all research processes. Each type of field note was also applied to this study to develop a rich data source derived from open, transparent, reflexive observations (Deggs & Hernandez, 2018). All field notes were completed during or immediately after the interview to ensure the memory of the impressions was fresh. In addition, field notes were reviewed periodically to triangulate the data.

During the interview, repetitive or emphasized concepts including the participants' strongest thoughts, experiences, and perceptions, were captured in note form. In addition, if the participant used a particular inflection or demonstrated emotion, descriptors were jotted down to provide context. Immediately after the interview, field notes were reviewed and additional comments or clarified thoughts were added to clarify when coding and analyzing. Before starting Chapter IV, each participant's field notes were again reviewed and coded line-by-line. This process was beneficial as it supported initial thoughts and assisted in combining or collapsing themes. Table 2 describes the use of each field note type including direct observations, inference notes, interview notes, analytic notes, and personal journaling. The purpose of the field note, such as gathering impressions of emotions through body language or verbal intonation, research process experiences, and content application (see Table 2).

Table 2

Field Notes

Field Notes	Purpose	Example
Interview notes Direct observation	Interview and interviewee	Sat up, smiled Shook head in dismay
Inference notes	Emotions	Voice change: excitement/enthusiasm Laughed when recalling a meeting
Analytic notes	Application	Visual tools: increases understanding Facilitative language: increases participation
Researcher's personal journal	Personal feelings Emotions and reactions Research process experiences	1st interview felt awkward Excited: respondents are experiencing successful FIEP meetings Research process Develop interviewee spreadsheet Timeline

Trustworthiness and Credibility in Qualitative Research

Trustworthiness refers to the rigor and confidence of the study as it relates to data collection, interpretation, and methodology. There are many methods to establish the trustworthiness of a study. In a qualitative study, the researcher focuses on the credibility, transferability, reliability, and confirmability of the project. Figure 2 describes the processes used to achieve each (see Figure 2).

Figure 2

Quality Frameworks in Qualitative Research
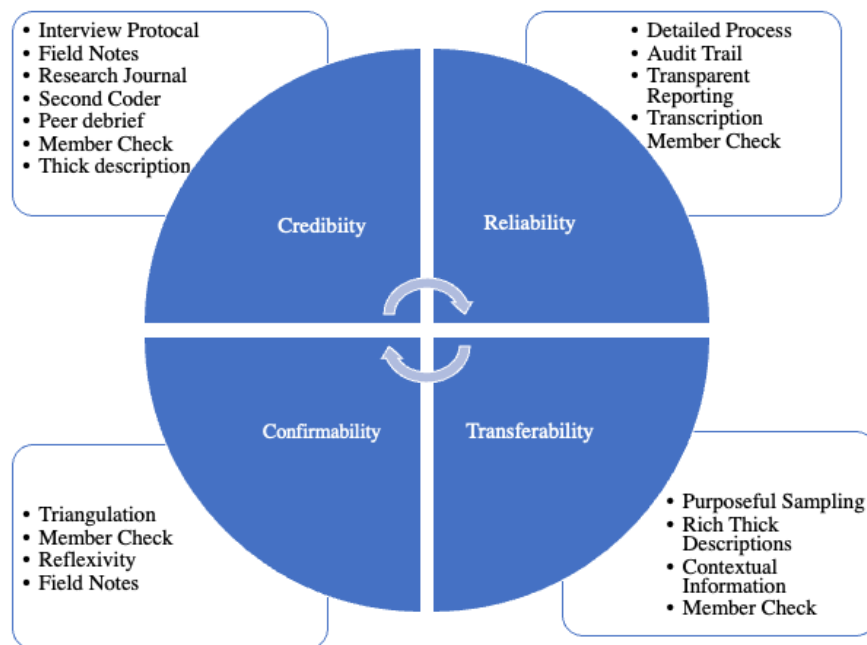
Credibility and Reliability

Credibility refers to confidence in the truth of the study. To address the credibility of this study, I maintained analytic and personal field notes as well as a research journal throughout the process with accurate, transparent, and reflective descriptions. Phillippi and Lauderdale (2018) recommend using field notes to provide rich content for analysis. For the field notes, I created individual interview protocols on a word document and used them to record contextual information noted during the interview. After each interview, I immediately reviewed the field notes to add impressions that were not captured in real-time. Then, I continued to refine these notes while listening to and preparing the transcripts for accuracy. The field notes were hand coded with the same line-by-line process as the transcripts. In addition, I reviewed my findings

with peers to reveal any alternative interpretations and check for unproductive bias (Creswell &
Poth, 2018; Phillippi & Lauderdale, 2018).

Another strategy I used to ensure credibility was engaging a second coder to check
interpretations against the data. This second coder was also my research advisor who is an expert
in qualitative research methodology, special education, and IEP facilitation. Additionally, she
has attended the CPR IEP training which added a layer of expertise in interpreting the training
experiences of participants. We decided that as an expert in the field, the independent coder
would review, and code all interview data for this study. Creswell and Poth (2018) recommended
following specific procedures to assure intercoder agreement. These included becoming familiar
with the coding process. Following this recommendation, we each developed a list of
preliminary codes after reading 5 of the 11 transcripts; then we met to discuss and develop a
shared codebook. Next, we applied the codebook to an agreed-upon unit of text and code and
compared coding. In the final stage, we had a rigorous discussion about how to use categories to
sort similar data points so that they described the characteristics of that specific category. This
process allowed us to collapse the many parts into whole concepts and then identify specific
themes within the categories (Morse, 2008). After completing the reliability coding, we
discussed the codes and determined and negotiated any disagreements until a new code was
established. There was no need for a third independent coder as we were able to agree on final
categories and themes (Creswell & Poth, 2018; Remler & Van Ryzin, 2011). To ensure
credibility, I also implemented reliability measures by maintaining a detailed audit process and
conducting "member checks."

Member Checking

Merriam and Tisdell (2016) recommended returning the final report (not raw data) or descriptions of themes to respondents to check for accuracy and congruency with their experiences (Merriam & Tisdell, 2016). After coding the interviews, I emailed all 11 participants a summary of interpreted data arranged into common themes (Birt et al., 2016). This encouraged the participants to confirm or contest my interpretation of findings and add any additional thoughts about the themes if so desired. In addition, the member checks ensured the data was translated into authentic and supportive evidence throughout the study. To receive this useful information promptly the email provided clear instructions for how to complete the member check activity and set a due date for remittance. The time parameter was critical in makings sure I had ample time to address any inconsistencies, consider relevant additions, and add additional information gained from the member checks to the manuscript. Specifically, participants were asked to follow two steps:

(1) Review the attached theme summaries and indicate *Agree* or *Disagree* when responding to the email.

(2) Add any additional thoughts or experiences below each theme that you think would add to the strength of the study.

Six of the eleven participants responded. Of those who responded, all agreed to the summarized findings and only one provided additional comments related to the value of using a visual tool called group memory. I added this information to the theme, *organized, consistent process*. There were no overt risks associated with the member checking for this study. Research cautions against potential harm to participants by "looking at experiences of marginalized populations or populations who have experienced trauma" (Candela, 2019 p. 620). However, this

type of trauma was not a part of this study topic. Some research experts warn against the risk of participant distress when seeing their spoken words in type. To address this, I did not add any direct quotes to the summaries and the themes were conceptualized. None of the participants indicated any hesitation with the process (Candela, 2019). Because the participants were asked to respond via email, there was no need for transcription of the member checks. All returned member checks were cataloged on the demographic spreadsheet. The member check with feedback was hand-coded and added to the data spreadsheet.

Transferability

Transferability is the ability to generalize research findings to other settings or groups (Connelly, 2016; Palinkas et al., 2015). Transferability was established by providing evidence that could apply to other IEP teams. I used purposeful sampling to ensure the participants met the criteria for reasonable transferability and "rich thick description" to provide readers the opportunity to "transfer the conclusions of the study to other settings or populations (Palinkas et al., 2015, p. 10). For example, participants' inclusionary criteria included practicing licensed educators who implemented facilitation tools and techniques. This maxim ensured transferability to any special education practitioner who is currently in practice and who conducts or participates in IEP meetings. This can be difficult in qualitative research due to the researcher's intention to study a specific issue that may only generalize to a small group. However, as Merriam and Tisdell (2016) noted, "The researcher has an obligation to provide enough detailed description of the study's context to enable the readers to compare the 'fit' with their situations" (p. 256). This was accomplished through thick, rich descriptions of the experiences, perceptions, settings, and population so that readers were able to determine the transferability as it relates to them.

Confirmability

It is imperative to ensure the findings of the study reflect the experiences and perceptions of the participants and not of the researcher. The researcher must be able to demonstrate that the findings are consistent with the data collected (Merriam & Tisdell, 2016). To assure confirmability, member checking, and continuous reflection were conducted to ensure conclusions reflected the participants' experiences and views. As an expert in IEP facilitation, a parent of a person with a disability, and a retired educator, it is important to acknowledge my role of "researcher as an instrument." Through the interview and analysis process, I used my expertise to observe details and participants' comments, evolve interview questions based on those concepts, and apply meaning to construct themes. With that said, I was careful to limit my voice and self-disclosure during the interview to not persuade the participant or negatively affect the discussion if the event the respondent might perceive me as being more knowledgeable about the topic and subsequently hinder their responses (Pezalla et al., 2012).

Triangulation

Triangulation uses multiple sources of data methods to build justifications for themes and increase understanding of the phenomena (Creswell & Creswell, 2018). In this study, I used multiple distinct datasets including the interview transcripts, a second coder as well as journaling, descriptive field notes, and member checking to address each research question and provide corroborating evidence which validated the accuracy and credibility of the study (Creswell & Poth, 2018). All artifacts were coded following the same line-by-line procedure, analyzed for emergent themes, meaningfulness, and relevance to the study, and agreement or contradiction of participants' perspectives. These triangulation strategies contributed to the relevance and context of the study as well as the validity and credibility of the findings.

Peer Feedback: The Researcher's
Doctoral Committee

To assess the process and product of the study, it is advised that an external audit is conducted by a committee or personnel not related to the study. This can also be conducted by a peer familiar with the phenomenon (Creswell & Poth, 2018; Merriam & Tisdell, 2016). Because this study was a component of the doctoral process, my doctoral committee provided peer feedback for this study during the proposal and analysis phases. Four committee members served on my doctoral committee. Each brought expertise in specific areas of research, providing critical input. The committee chair, as an expert in qualitative research, facilitated IEP meetings, family professional partnerships, and special education law, and provided additional insight into the topic of IEP facilitation. The three remaining members were also experts in qualitative research as well as educational research, consultation, family support and advocacy, and personal preparation and, thus, provided me with recommendations on how to expand the literature review and interview protocols to devise, conduct, and analyze the study.

Conclusion

Through qualitative inquiry, I sought to explore the experiences and perceptions of educators who attended a structured FIEP training and their reported experiences when using specific FIEP tools and techniques to facilitate meetings after completing the training. Based on previous research, IEP team members report the need for processes that create unified, collaborative, and equitable meetings. Thus, this study is critical in understanding and implementing practices that forge meaningful collaboration among FPPs and specifically between IEP team members.

To ensure the study was conducted with integrity, I used a variety of methods. First, I provided a rationale for using a qualitative approach to address the research questions. Then, I

followed an outline of the principles of phenomenological interviewing which included offering

a description of the sampling procedures used to select and recruit the study participants. Finally,

I discussed, in detail, my data collection and data analysis procedures and described how I

addressed credibility and trustworthiness as they impact qualitative research. The results of the

study provided beneficial information related to developing collaborative IEP meeting processes.

CHAPTER IV

RESULTS

This study explored the perceptions of educators regarding their experiences with attending IEP facilitation training and implementing their learned facilitative tools and techniques for subsequent IEP meetings. Findings from the study indicated the participants had an overwhelmingly positive and meaningful experience with the training that included adult learning preferences and best practices for preparing for and facilitating collaborative IEP meetings. Detailed thematic analysis revealed three major categories in response to the research questions. Q1 posed, "What are the experiences of in-service educators who participated in the FIEP CPR training?" This resulted in forming the category that *provided valuable training experiences* which were divided across four major themes: (a) engaging learning environment; (b) experienced knowledgeable trainers; (c) interactive opportunities to practice new skills; and (c) interactive opportunities to collaborate.

Q2 queried, "How does the experience of the training inform or shape the participant's outcomes of the IEP meetings?" Two categories evolved from this question. The first, *improved the IEP process*, was divided across two major themes: (a) increased team preparation; and (b) increased participation and understanding. The second category, *organized consistent process through strategic tools and techniques* was divided into six themes: (a) agenda; (b) outcomes; (c) parking lot; (d) norms; (e) group memory; (f) roles; and (g) facilitative language (see Table 3). Data obtained from the interviews in support of each category and corresponding themes are presented here.

Table 3

Categories and Themes

Category	Themes
Provided a valuable training experience	Engaging learning environment Experienced knowledgeable trainers Opportunities to practice new skills Opportunities to collaborate
Improved the IEP process	Increased team preparation Increased team participation and understanding
Organized consistent process through strategic tools and techniques	Agenda Outcomes Parking lot Norms Group memory Roles Facilitative language

Valuable Training Experience

Engaging Learning Environment

All participants appreciated the engaging learning environment that was provided throughout the training. Specifically, participants described an engaging learning environment that included a combination of direct instruction, modeling, discussion, and practice. Participants mentioned each of these activities as a successful way to learn new skills, refresh and reframe existing skills, and interact with the content. For example, one participant spoke about the delivery of information as it related to her learning style, "It hit all the areas, the hear, see, say, do . . . so, I felt like they hit everything. We heard it. We saw the material, with the visual. We had to say it, and then we had to do it in an application."

Along the same lines, a participant described it as a harmony of information and activities saying, "It was like a balance, I guess, like a lot of good information but, at the same time, implementing it and practicing it, and being shown how it's going to work versus just a sit-and-get." All 11 participants expanded on this description further by adding their appreciation of the practical information. For example, one respondent mentioned being excited about the content, "I remember thinking, oh, this is real life thing that I can take and immediately use. This is real, immediate . . . good, practical stuff I can use, and I really appreciated that." A director, who attended the training with her staff, mentioned the power of thinking about a specific IEP team or IEP meeting when learning the skills. She described the effect she has seen as a result, "I think it has been impactful for some of my staff . . . that has really helped people to think about those challenging needs and reframe them in a way that we can . . . set them up for success." A case manager added her perspective on how the information added to her existing practices, stating that the training was "very interactive and dynamic. I didn't feel like I was being told something I already knew. It was taking what I already do and actually learning something new about how to implement something and it was so much interaction and practice."

Large- and small-group activities were also named as effective strategies for thinking through how to apply different techniques as well as providing a safe environment for "allowing us to ask questions." One participant reflected on the large- and small-group discussions as being a strong way to think through applications,

> They gave us different scenarios that said . . . how would you handle this? What kind of meeting would you have? What kinds of communication would you utilize? Just different things that we as special educators, and just our team in general, would see on kind of a regular basis. They gave us real examples, not just the textbook examples . . . it was real

examples, of real people, who've actually sat through and [have] done some of these things.

There was strong agreement across participants that the "high quality, training materials" such as visual charts, videos, and the manual supported their learning and increased their understanding of the FIEP process. This participant appreciated watching video demonstrations and then breaking into small groups,

> One of the cool things was . . . to see a lot of video and really do a lot of discussions in a small group and breakout rooms where we were able to watch the video and practice how we would do the facilitated IEP.

Another described how watching the demonstration videos aided in providing an "idea of what the setup [of the facilitated IEP meeting] should be like." Using the manual as a tool during and after the training emerged across participant feedback. One participant indicated using her manual after the training to remind her of the techniques or set up for a difficult meeting. During the interview, the participant actually sat up, got a big smile on her face, and exclaimed,

> I liked the workbook we could then go back to . . . because if we weren't in an IEP meeting [after the training], it's hard to process that unless you're in the moment. It was good to have that and be like, 'Oh, what should I have done in that [situation] . . . going back and reviewing the training [workbook]!

A district leader expanded on this practice when thinking about how to encourage implementation across her district. She shared, "When I started revisiting and trying to explore our district using facilitated IEP, I got back into it, got my manual out, started prepping and getting all the information back in my brain."

Experienced and Knowledgeable
Trainers

Trainer expertise was mentioned across participants as an important component of the effectiveness of the training. When describing the trainers, one participant's body language indicated her frustration when thinking about trainers who do not have practical experience. She then went on to describe the trainers she had for this workshop: "They had a very broad background in special ed, in terms of like being administrators, being teachers themselves. So, they had a lot to pull from." The trainers' experiences in facilitating meetings were recognized among participants in helping to provide suggestions for complex conversations. Another respondent noted, "The trainers were very knowledgeable . . . the fact that the trainers' background is education . . . they know what to say in a meeting." Participants found this to be especially comforting when considering how difficult it might be to change their standard practices. One participant described this feeling eloquently, "The trainers have facilitated so many meetings and they have been in my shoes of having to change how they run meetings. It encouraged me to be able to hear their stories and experiences." Additional comments about the benefit of the trainers' expertise and style were provided across participants using words to describe them as knowledgeable, encouraging, engaging, and interactive.

Participants also recognized how the trainers used many of the facilitation tools and techniques to conduct the training and model the model which provided cognitive support in learning, understanding, and internalizing the concepts. One participant mentioned the benefit of seeing the charts, "all the visuals really helped because it . . . showed you how to use visuals . . . it was a good model." Other evidence of agreement among participants was demonstrated through comments such as, "When the trainers were training us, they used the FIEP model during the entire training . . . so, they were charting, and paraphrasing, and modeling how to do

everything . . . which was really helpful." And, "the way the trainers used the visuals in the training really helped to transport it into the real-life IEP meetings . . . just the way they used visuals, and consistently modeled the strategies." Comments about how the training and trainers prepared the participants for immediate implementation were consistently provided across respondents. This led to the third theme which emerged among all 11 participants.

Interactive Opportunities to
Practice New Skills

The concept of practicing new skills throughout the training was described as "helpful, necessary, meaningful, and crucial" in preparing to implement the techniques after the training. One participant was anguished over trainings that do not embed practice, explaining how she sits in those trainings thinking "I don't actually know how to execute this in my class." Practice activities experienced in the FIEP CPR training included FIEP role-playing, think-pair-share, triad-conflict problem-solving, and language role-play and scripting. While all activities were highly regarded, role-playing emerged as the strongest interactive practice opportunity.

During the role-play activities, participants were asked to facilitate sections of the IEP meeting. One participant described the value of only facilitating a small portion of the meeting stating, "It gave us the opportunity to [facilitate] . . . and . . . I liked that other people did a part too so I could see other styles." Another participant had the same feeling stating, "I liked all of the role-playing because it's easy to watch somebody and think about how you could have done something differently or how it applies to that specific situation." One participant recognized role-playing as a valuable technique that she also uses in her current position. "We did so much role-playing that day, and I think that's just so crucial 'cause [sic] as a social worker, we role-play all the time in groups." Another stated how important the role-playing activities were for her learning process,

> There were breakouts where we actually . . . acted in an IEP . . . we all took on the different roles of the different people in an IEP. We had someone that was facilitating and had [someone] writing things on the board. . . . I just appreciated walking through and knowing that there's different tools and there's different ways to do things.

This participant who was in her first year of being a school psychologist, mentioned the role-play activities as helping her to have a better understanding of how a meeting should run. "I was newer in practice as a school psych. I was like, 'I don't know what the hell they're talking about.' I hadn't had a lot of experience in IEP meetings, it helped me understand how a meeting should function." She went on to describe how it enriched her practice in other meetings:

> And even with MET meetings, I believe I had the training either my internship year or right after so, I was super green with it, right? And so being able to practice that, and then see . . . for me, because I'm such a visual learner, to see how people used the method was really helpful.

A few participants described their dislike for role-playing as well; however, they quickly countered this feeling by saying it was still a critical learning experience. One participant laughingly reported, "As much as I despise role-playing . . . it was [good] to use the material in a way to practice through it and then . . . see others do it as well." Another participant admitted that role-playing was not her favorite, but then went on to say,

> But I think [role-playing activities] are necessary to be able to implement the meetings or know what you're doing when you start to do them in your building. It's not like I should have been allowed to skip them. It's necessary. It was just nerve-wracking.

**Interactive Opportunities to
Collaborate**

Another theme that reoccurred throughout the data set was the benefit of interactive

opportunities to collaborate with colleagues. These engagements happened intermittently

throughout the training and provided participants, either individually or in teams, the time to

practice their art form, develop the next steps in implementation, plan for an upcoming meeting,

create individualized visual tools, and discuss learned concepts. While training participants are

not required to attend the training with other members of their IEP teams, it is recommended to

each district as a way to develop sustainability and an implementation support system. Those

who are not specifically accompanied by their team still report the value of collaborating with

other special education personnel. Multiple interviewees mentioned agenda planning, sharing

thoughts about new concepts, and creating visuals for virtual meetings as particularly dynamic

activities. One participant expressed relief when virtual meetings were addressed, "It did get us a

little bit more used to those Zoom meetings and what that looks like . . . so many of our meetings

at that point were all virtual." When asked to describe how she applied the information, she went

on to say, "We were able to create our [Google slide] presentations . . . it kind of gave us some

ideas for creating those presentations."

The opportunity to work with colleagues was expressed by participants as a rare

occurrence and, thus, a favored part of the training. Not only did this provide a venue to discuss

different viewpoints and art forms, but it also allowed for collaborative brainstorming and

planning. One participant described the merit of working with her team members as, "Just seeing

it in practice and hearing the information with other service providers who I worked with, it was

informative. We were able to talk about our own practice while we were getting the new

strategies, or ways of doing things." Another mentioned the importance of having time to absorb

and discuss the information during unstructured times as well. She recalled, "having the time [to think and talk about] the material . . . a lot of times at my table . . . during breaks."

Peer and trainer coaching was also cited as a positive experience across participants. During group discussions, the trainers and participants engaged in ongoing interactive discussions. The trainers encouraged the participants to help each other problem-solve certain scenarios using the techniques learned. During role-play, structured coaching was used to identify facilitation techniques that worked, as well as how the technique could be refined. Participants were asked to provide positive peer feedback and then the trainers provided coachable input. One participant recalled being appreciative of the coaching process:

> They asked for the participants' feedback as to what each person did well, and then asked the person who role played what could they improve on. And after all of the participants shared, then the trainers went in and said, well, here's what I saw.

A district administrator mentioned the coaching as valuable enough to continue in her district. She stated, "I think everyone . . . needs coaching year-round." Another participant described how the coaching helped her to think about the importance of using common terminology during IEP meetings. She remembered the coaching as a significant part of the training stating,

> I made a comment [during the role play] like, Oh I'm gonna [sic] do "push in" minutes, and then [the trainer] was just kind of like repeating, push in, push in. . . . I'm like, "you're right. I shouldn't have said that. They have no idea what [push in] means." And I'm usually cognizant of what parents are understanding and not understanding. That's why it helps to practice things.

One final but interesting thought that was echoed across participants was the belief that the training should be a required course for educators. There was consensus that most educators

know "bits and pieces" of how to run an IEP meeting but due to a lack of structured and complete training, many participants identified the need for training during the teacher preparation phase or while in service. One participant promoted this by saying, "Facilitated IEP should be a college course or maybe it's not even a college course, but it's a seminar for all resource teachers, prior to starting their practice." In addition, participants indicated the desire to have other team members trained in the process. One veteran educator commented,

> This is my 23rd year of teaching and that was probably one of the best trainings that I've been to . . . it's elevating a practice that has been going on and on and on. And nobody's ever really had any specific training on how to run an IEP meeting. So, out of all [other trainings], I think that is probably the training that I use the most.

Another explained her district's commitment to training its staff,

> We trained all of our principals, APs, and psychologists, and then in the last one . . . we trained a lot of our new teachers. A lot of our older teachers I think had gotten it a few years ago. So, we are on a mission to have all of our teams, all of our SLPs, all of our teachers trained in this process.

Improved the Individual Education Program Process

Q2　How does the experience of the training inform or shape the participant's outcomes of the IEP meetings?

All participants described the FIEP as an improved process from conducting a traditional IEP. For this study, a "traditional IEP" was defined as any IEP meeting conducted, by the participants, before attending the training. Each respondent emphasized this perspective by first describing their typical method for running a traditional IEP and then comparing it to the FIEP process. Ten out of eleven participants mentioned relying on the IEP paperwork to guide the traditional meeting. Common phrases such as, "going page by page," "reading [reports or pages

of the IEP document] to them," "working through the paperwork," and "reporting in silos" were used when talking about how meetings were previously led. One participant described the process as "boring," admitting that she would not always listen when it was not her turn to report. "I was guilty of this when it was not my turn . . . I wasn't always listening, or I was sending an email and I shouldn't have been or something like that." Others agreed that reading the paperwork resulted in inattention and confusion, commenting, "You could just tell parents were getting lost . . . even if they spoke the language, they were getting lost." One educator provided this description:

> We would go through all of the paperwork, essentially going page by page, pretty much reading it to them for the most part . . . and then, you know, periodically we'd stop and say, "do you have any questions?" And most parents, it's so much information that they'd sit there, and they'd say, "no, no, no, it's fine." And so, we continue on through our papers, we'd have 'em [sic] sign what they needed to sign, and we'd send them on their way.

> Reading the paperwork also limited the collaborative discussion among team members. Multiple educators mentioned only one person "doing all the talking" and recalled only "chiming in when it was my turn," rather than having an interactive discussion. A psychologist participant admitted not knowing she could give input if it was not her area,

> I just tried to give my information and participate best I can in the IEP piece . . . but previously, my experience was I didn't really have a lot to do with the accommodations, or the minutes, or how it's all connected.

Another respondent pondered the process and then disclosed,

> When we got to the [present levels of academic achievement and functional performance]
> PLAAFP strengths and challenges, then SPED teacher would report their strengths and
> challenges. Then call upon each of the different members in silos, to give their strengths
> and challenges. . . . I don't think they're listening when they're silos.

Shifting focus from the traditional IEP to the FIEP, participants enthusiastically described the benefits of using the facilitated method. Multiple participants identified the positive impact of using a structured format to facilitate the IEP meetings. Specifically, participants described the FIEP as being "a straightforward" method that "flows" sequentially, allowing the team members to "make connections" between IEP topics (e.g., present levels of performance, goals, supports, accommodations, service minutes, placement, etc.). For example, one special education teacher explained,

> If I start with my present levels, I have my roadmap. . . . I know what the kids are going
> to need. So, when I talk about the challenges, at the same time, I can talk about . . .
> [related] goals and accommodations.

A district leader praised the facilitated process describing it as "a simple, conceptual model, for a very complicated process." She went on to explain that it was her vision to "share [the process] with all my stakeholders so that we can make it more engaging, and not seem like a task we have to click off. Like . . . 'Oh, we checked the compliance box.'" Another administrator proudly shared, "Our team has put in the effort to learn how to do this process. It helps everybody . . . that consistency from case manager to case manager, especially for . . . our service providers who go to different buildings."

Another commented, "It [the FIEP] is following the natural flow and legal flow of the process." She also explained that when team members are not familiar with the legal requirements, the facilitator explains what is occurring and why, "There's . . . some process commercials in the meetings, in terms of letting them know what we were doing, and why . . . but it flows much better . . . it's collaborative, it's a conversation." This was punctuated by a district administrator sharing, "I think my vision would be that we systematically teach and train all staff in this methodology so that we have a shared framework and understanding."

One participant described how she uses the FIEP process to encourage team members to listen to each other and engage in the conversation, rather than just waiting to read their section. She mused how powerful this was for related service providers to be able to add to the general conversation: "Normally we're not going to talk about OT until it's OT's turn. They're jumping in now with strengths that they see . . . or if they see them on the list, they're like, 'Oh, I see that too!'" She also provided this example,

> The school psych will mention something and then I'll say, "Oh, I saw that too." So I put
> my little check mark next to it [to show] I agree. And then I usually say, "Mom, do you
> see this at home?" . . . and if she also does [we talk about it] so we're just trying to catch
> it all from everyone's perspective.

Two participants, an educator, and a school psychologist, talked about how the FIEP format was more student-centered "when you shift to this newer focus, it's about the kid" and how the conversational format makes it obvious that the team is there to "support this child in their learning." Many others identified the consistent process and flow as answering the aforementioned negative practice of reading the pages to the team. One participant described the

FIEP process as "a more proficient meeting, talking, just having a conversation about the kiddo."

When this participant described the shift from reading, the relief in her voice was palpable,

> The shift of the focus of the meeting, was from the document and going through it. It was
>
> more about incorporating the components . . . without getting hung up on the minute
>
> details of that paperwork that parents don't quite know the ins and outs of. You want to
>
> have a conversation, and know the paperwork is getting done, and you're addressing
>
> everything, because, as long as you have the components . . . you cover everything.

Conducting meetings that follow a "natural and legal flow" that is more "conversational" and "collaborative" takes forethought and team member coordination. Strategically preparing for a FIEP was mentioned across participants as both necessary and beneficial. This increased team preparation is the first theme in this section and is described below.

Increased Team Preparation

This theme highlighted the importance and commitment of each team member coming prepared to share responsibility for the collaborative process. While most participants mentioned preparing draft IEP documents for traditional IEPs, all 11 participants felt meeting preparation was beneficial for an efficient, collaborative meeting. Nine out of eleven described a different, more strategic type of preparation for the facilitated IEP. One participant likened preparing for the meeting to "build[ing] a tool to make it not only user friendly and friendly for parents, but also for ourselves as we prepare for the meetings to make sure that we're ready for presenting and collaborating with parents in that process." Others described that pre-planning each section of the facilitated IEP meeting results in "helping the meeting to run smoother" and "allowing all members to come prepared" to engage in each part.

These preparation activities occurred either individually or during informal team meetings and included working with families and students. One high school case manager outlined her approach to preparing families and students ahead of time. She described calling families and asking them to come to the meeting with their child's strengths and challenges from the home and community perspective as well as goals for their child's future. When working with her students, she talked about teaching and role-playing the FIEP process where they practiced talking about their strengths, challenges, and preferences. With empathy and passion in her voice she said, "It's really intimidating when you've got seven people sitting in this meeting . . . and the kid, they get really shy . . . talking about themselves is hard." She added how introducing the process to the student before the meeting alleviates stress and individualizes different ways the students can participate.

Another factor resulting from strategic preparation was the ability to plan for difficult meetings. Participants across the study recounted using the FIEP framework during planning sessions to identify possible roadblocks and brainstorm solutions.

> It's the answer to how to implement the paperwork or how to disseminate that
> information, in a way that people can actually walk away going, "I felt good about that. I
> didn't feel like I was being in trouble, being scolded at a meeting."

Another noted how the planning sessions focus on the student, "We're really . . . being more strategic about how the child's being serviced, not just what the paperwork looks like."

One director provided an example of planning for a meeting to address a request for an outside auditory processing assessment. She outlined how the team used the FIEP agenda as a guide to address the request, "Let's see if, as we go through [the meeting], we address the concern. Because what does that mean, auditory processing? What's the concern does that goes

with?" The team also reviewed strategies to keep the discussion on track such as using the parking lot and agenda to redirect conversations. During the meeting, the team agreed to house the assessment request in the parking lot, a large chart paper where non-IEP topics are written until all challenges, goals, and service proposals were discussed. At the end of the meeting, when "unparking" the assessment request, the advocate jumped right in and said, "No, no, we have no more concerns." After the meeting, the advocate asked the director, "What was this you did? What's this called? I've never been in an IEP like this before." After recalling that experience, the director attributed the success of the meeting to strategically planning the process to address the family's concerns. With a grateful tone, she ended the recollection with, "It was very collaborative."

Another participant provided an example of how planning for difficult meetings has helped to minimize potential rogue or inflammatory comments during meetings. She provided examples of team members coming to meetings, blurting unproductive statements such as, "This student is not going to be successful in Gen Ed!" without having outlined any specific evidence of barriers or challenges related to the student's disability. She continued to describe how meeting ahead of time benefits everyone in brainstorming some options,

> So, it really gives us a chance to help understand the specific barriers from the . . .
> teacher, so when they're sharing, they don't look like that negative person who doesn't
> want them in the classroom, but more so like, "Oh, that piece could be a barrier, okay,
> can we reduce the workload? Can we provide the work in advance? What can we do to
> make it happen? Or what can we do to make it successful?"

This quote demonstrates how planning and supporting one another also helps to develop trusting relationships among team members. Other participants added similar sentiments: "I feel like the

meetings have been less adversarial, more collegial," as well as, "I think it helped a difficult meeting go well."

Additionally, all 11 participants mentioned how planning aided in preparing team members to meet the expectations of their role during the meeting. One participant described a pre-planning meeting where the team reviewed how the meeting would run as well as establishing each team member's roles.

We sit down to determine roles and things for the meeting, everybody knows what each role entails. Everybody knows what the meeting is supposed to look like, how it's supposed to run. So going in there, everybody knows what their job is . . . this person will share their screen, this person will take notes. We don't have to sit there [during the meeting] and be like, "Hey, will you take notes? Hey, can you do this? Hey, will you print off that?" That's all determined ahead of time. So that when we sit down . . . it's really just focused on discussing their student and the plan.

Another participant described similar thinking when strategically planning who would be best to deliver certain information. She admitted before the training she would do most of the talking. After her site attended the training, the team committed to ensuring all members had a voice in the discussion. She recalled preparing for one specific meeting, "Our social worker's been involved in 10 out of the 12 behavior incidents that have been reported in the classroom or the hallway, maybe they should be the one to present the [information] and behavior plan." This concept was strongly supported across respondents in the effort to ensure that all the work does not fall on the facilitator's shoulders. This participant shared,

I like to meet with my teams beforehand so that we can talk about . . . the agenda, these are the things we need to get out, and how are we going to get them out? Who's going to

say what? What can I do to support you in that conversation? That pre-meeting . . . helps

make our process go a little bit smoother.

Working with the general education teacher ahead of time to help them understand their

role in the meeting was another strong practice related to preparation. One participant admitted

to previously inviting "whatever general education teacher that would typically say yes to the

invite." However, now she ponders who will be most effective in the meeting: "I bring the most

important Gen Ed teacher . . . that's a part of that team and [related to] their disability." Then she

helps to prepare them on what to talk about and how to present the information, explaining,

> It allows me and the special ed team to front-load our gen ed counterpart. Letting them
>
> know, "Hey, this could happen. I want you to be prepared for it. I want you to know this
>
> is going to come up in the IEP. I don't want you to be shocked."

Another participant described sending a friendly email before the meeting, "Hey Gen Ed

teachers, here's the information that you need to have prepared." She enthusiastically reported

that teacher response has been positive with feedback from her colleagues including, "I knew

exactly what you were looking for," and "That was great, I actually knew what I was supposed to

talk about. . . . I always talk about grades, because no one's ever told me what to talk about."

Based on the participants' feedback, it is clear how participants directly linked strategic

preparation to an improved IEP process. Another theme that contributed to meeting improvement

was the increase in team member participation and understanding.

**Increased Participation and
Understanding**

Participants agreed that using the FIEP tools and techniques increased participation

during the FIEP meeting and increased team members' understanding of the IEP process as well

as student needs. When talking about using a facilitative process, one participant stated, "It

helped the mom kind of . . . learn the process of the IEP, like when we're going to talk about specific things." Another participant expressed how the facilitation model provides the "whole picture" of the student so that the team can craft a program to meet the student's needs. She went on to say, "It helps [staff] get a better picture of the student and it helps parents feel like they're now part of the discussion and they're able to give us more information to help better understand their child." A program specialist spoke about increased parent participation in her meetings stating, "We got so much more discussion with the parent, so much more parent involvement." She attributed this to "less focus on paperwork . . . just talk[ing] about, 'what are the strengths, what are the challenges, how are we gonna [sic] address these challenges' . . . it is definitely much more collaborative, it's a conversation." Some respondents noted making the shift from reviewing the paperwork to creating a visual conversation took practice, but the results were worth it. Two participants noted, "We realized little by little it's an actual discussion" and parents are leaving feeling "more sure of themselves . . . leaving the meeting understanding [the content]."

Participants also talked about increased staff participation. One participant reported, "The staff had said they really like having visual group memory and seeing what's going on." Another described how using group memory, a visual charting system used during IEP discussions to capture summaries of the team member's input, has led to staff listening to others' input, making connections, and thinking about how it relates to their experiences with the student.

A school psychologist provided this insight, "In doing the facilitated process, what they're [team members] seeing is a more comprehensive picture across the board." She added,

Everyone's a different learner . . . and I find it more with one of my [staff] . . . when she hears it and sees it written . . . she thinks of something else and . . . adds to [the group

memory]. People appear to be listening more. They just get a better understanding of what impact the disability has, because they're hearing [and seeing] different people talk about things, and how they're affected in those settings.

Another participant had a similar experience: "Even our nurse participates, too . . . I would always say, 'Are there any other strengths to add [to the chart],' and the nurses started chiming in." Multiple participants reported a dramatic increase in general education participation. In one district, the director provided this estimate:

If we were looking at a hundred Gen Ed teachers in an IEP, I would say 60% to 70% [are] talking more . . . so those that always talked, talk more . . . and those who were never people who participated, you'd get something out of them.

Another participant spoke about the change she noticed in her general education teachers' input from a traditional IEP to a FIEP: "The teachers usually [said], 'Oh they're doing fine in reading or . . . math.' Well, now they have a chance to talk . . . with more data because it's on the screen. It seems to help them talk more." This participant also compared general education teacher participation in traditional IEPs to facilitated meetings:

Usually [the general education teachers] . . . sit and listen so that they're familiar with the plan . . . now, the gen ed teacher has so much more to share. It feels much more like a round table. . . . the visual helps so much!

She continued her thought with, "It is easier to do what we've always done, but I think this gives us the chance to explore different things and different ideas come about when we have these [visual] discussions."

All participants who had facilitated meetings requiring translation reported feedback from families as being positive. One respondent recalled a specific parent's praise for the meeting

format: "The process made her feel like she had played more of a part in the meeting." Adding, "This parent was able to read most of what was on the charts but said having the supportive visuals were helpful in better understanding her child's strengths and challenges at school and how the team was helping him." She also noted the parent jumped into the conversation more, adding her thoughts and asking the staff questions.

Organized and Consistent Process through Strategic Tools and Techniques

Q2   How does the experience of the training inform or shape the participant's outcomes of the IEP meetings?

All participants talked about the importance of using visuals during traditional IEP meetings including charts, diagrams, graphics, classwork representations, lesson frameworks, data records, etc. However, there were five tools and two techniques, identified by participants, as being critical in conducting an organized and consistent FIEP meeting. In this study, the term *tools* refer to visual charts used to structure the meeting format, focus the team members, establish an interactive, respectful environment, and encourage dynamic collaboration from all team members. The six tools are: (a) agenda, (b) outcomes, (c) parking lot, (d) norms, and (e) group memory.

Strategies are defined as techniques used to create an environment where all team members have shared responsibility for the content and process of the meeting. In addition, strategies named in this study aid the team in communicating effectively so that each team member is valued and heard, and the information provided stays focused on the needs of the student. The two strongest techniques described across participants were: (a) defining roles, and (b) using facilitative language. Each of these tools and techniques is described as themes below.

Agenda

All participants reported using an agenda to establish and clarify the meeting process at the beginning of the meeting as well as to keep team members focused during the meeting. The sample FIEP agenda used during the training lists five main sections: the welcome, present levels of performance, goals and objectives, services and placement, and closing. The other required components of the IEP are then woven into those sections as the team moves through the meeting. Participants are trained that the agenda should not list every detail, but rather just the overarching IEP topics to use as a framework that follows the federal law in a guided discussion. All required components are addressed during the FIEP meeting. However, the goal is to strategically weave them into the framework as the discussion occurs naturally rather than reading the pages of the document. One participant described this visual framework as being educational, "It really has helped the team, and it honestly has helped me even understand the IEP process . . . running IEP meetings and just the purpose behind them." Another articulated her thoughts about the usefulness of the agenda, "Having that [agenda] as visual guidance for what we're talking about and having it up on the board so that you can reflect on it [is powerful]." This similar thought was also shared: "I think setting agendas . . . and having that organization . . . has been a really great way of focusing attention." This participant provided her insight into how using the structural tools and, specifically, the agenda established the meeting process:

> Everybody's on the same page. Everybody knows what's being presented. And then so when it comes to parents, too, everybody's giving them the same messages as well . . . we have an agenda that we post for every meeting so that parents know the . . . set process that we're going to follow.

A participant who facilitates meetings with families coming from culturally and linguistically diverse backgrounds mentioned the agenda serving as a "roadmap" and providing a "reliable and consistent process and flow when conducting the meetings in more than one language." She explained, "Because I'm trying to keep [the information] in my mind, translate it, and then say it back . . . having that roadmap was really helpful." She continued with her thought by adding that she noticed during the meetings the translators were taking notes on the agendas and saving them. When she asked them why they were saving them, the participant recalled, "They said, '[We] really like these. They help remind us of the process.'" Because often the translators were "usually a staff member . . . like a secretary or the attendance clerk" and were not formally trained or familiar with the IEP process, she then took time to review the IEP process and the common topic areas listed on the agenda. She also assured the translators that each meeting would follow the same framework, with some additions based on the type of the meeting and individual student needs. She recalled them feeling empowered and "finally had a clear understanding of what was going to happen during the meeting" which helped them to provide fluid translation for the families.

Outcomes

The outcome chart was another visual tool that participants named as helpful in increasing understanding of the IEP process. These visual "goals for the meeting" are posted on a chart for the team to review, clarify, and agree to before reviewing the agenda. The outcomes are not meant to be a checklist of what to do during the meeting, but instead, briefly describe, in short, bulleted phrases, what the team wants to accomplish by the end of the meeting. The outcomes align directly with the main IEP categories discussed in the previous section and are directly related to the type of the meeting (i.e., initial, annual, triennial, etc.). An example of

common outcomes for an annual meeting includes an understanding and agreement on the student's present levels of performance, goals, and services and placement. One participant linked the outcomes and the agenda stating, "The outcome is the destination, the agenda is the roadmap for how we are going to get there."

Participants who used outcomes in their meetings reported that they helped focus the conversation on the IEP topics to accomplish "what we are all here to do." Many participants indicated that they never thought of using outcomes but were glad they started using them as they could be referred to when the conversation "veers off topic." One special education teacher mentioned a meeting where the parent and general education teacher were getting "side-tracked about an upcoming school dance." As the facilitator, the participant referred to the outcome chart and reminded the group that they agreed to "stay focused on the meeting outcomes." Once the team gains agreement on the outcomes, many participants said they then requested any items that are not directly related to the outcomes to be put on the parking lot.

Parking Lot

The parking lot chart was mentioned across participants as being an "efficiency tool used to keep the meeting on track." One respondent stated how using the parking lot "really does make [the meeting] go faster and it cuts out . . . unnecessary things. Of course, you're going to have [team members] that might want to talk longer, and that's why you have the parking lot." She went on to describe her team's practice for using the parking lot,

> We'd always have a parking lot attendant at the meeting, and sometimes that would be something that at the very end of the meeting, we may be able to address or sometimes we would be able to say, "Hey, we'll email that to you to answer any of those questions."

In this example, the parking lot attendant was a team member whose role it was to "jot down items" that arose in the conversation but were not IEP topics, such as free and reduced lunch, school-wide activities, overdue library books, etc. This allowed the flow of the meeting to continue without getting derailed. "I tell them that's something we can talk about after a meeting or on another day." And then she has the charter write the item on the large chart labeled "parking lot" so that the item is visible, validated, and not forgotten. An important factor participants mentioned about the parking lot was to remember to "unpark" the items at the end of the meeting. This was critical so that the team member did not feel put off or devalued. In addition, addressing the "parked" items at the end of the meeting helped to build trust among team members.

Norms

Ten out of eleven participants talked about using group norms during their meetings to ensure team members understood the need for an efficient, collaborative, conversational discussion. Having the norms posted where all team members can see them provided a visual reminder that the team agreed to operate respectfully. Most participants reported using the norms provided during the training. These included: (a) communicate clearly and listen carefully, (b) respect the views of others, (c) share your views willingly, (d) ask and welcome questions for clarification, (e) be open to the ideas and views presented, (f) honor time limits, and (g) stay on task. However, a few participants also created norms that better matched the culture of the school and community. Common adaptations included rewriting the norms to be less formal and adding technology norms for virtual and in-person meetings (i.e., muting when not speaking or silencing phones).

One participant mentioned that her school already uses the "seven norms of collaboration" throughout all classrooms and staff meetings so incorporating those into the IEP meeting was natural and effective: "It was something that I would use specifically at the beginning of meetings . . . to focus attention and cut out any of the unnecessary behaviors." Another participant also highlighted the collaborative aspect of the norms, explaining how she emphasizes the importance of participating and asking questions to ensure understanding: "One of our norms is to encourage . . . everybody . . . to participate." Another participant also used norms to encourage participation stating, "We have . . . the norms of communication. I think they're great to set the expectations . . . [to] have those more collaborative conversations, I think they're super valuable." After having experiences in meetings with and without norms, one director was adamant about her team using norms in all meetings. She described the importance of giving "everybody a little bit of guidelines. . . .'we're all going to expect this' [in the meeting]." She had one experience with a parent where she was thankful that she had established norms from the beginning. She recalled the previous meetings without norms where the parent had "screamed [a lot] and hung up the phone on us." Thus, at the next meeting, she proposed the norm, "be respectful, and value the opinions of others" and then asked for team agreement. The same parent responded with, "I'm not going to be able to abide by these, so I'm just going to leave." The remaining parent allowed the meeting to proceed, and they were able to craft an agreed-upon program. The director attributed being able to conduct that meeting to having the norms as a part of the structure and avoiding disruption. "Without the norms", she stated, "he would've felt he was allowed to be rude." But instead, "he was very calm and left without causing a major scene."

Not everyone in the study felt comfortable using the norms chart at first but were glad to have them when emotions were high, or conflict arose. Two participants were worried about sounding too formal, particularly in low-conflict meetings. One stated, "It's just there's a weird part of me that's . . . uncomfortable with the norm thing but, when they're there, and you have things going awry, it's perfect. So, it's important." The other dealt with her hesitation by asking an administrator to present the structural portion of the meeting which included proposing meeting norms. She explained,

> I struggle with [the norms] in a regular meeting, and establishing them, and carrying out them because I feel like it's insulting. But I will say that, when you have a meeting that's not going well, it is great when you have your admin in there going, "Hey, we're not following the norm."

Group Memory

The final visual tool participants identified was the use of the collaborative aid, group memory. The group memory is a graphic charting system that captures the conversation during each section. When team members present their information to the team, one team member's role is to summarize that information visually into bite-sized phrases. Ten out of eleven participants described using the visual group memory starting at the present levels of performance discussion and then continuing through the rest of the meeting.

Participants overwhelmingly reported the benefit of using group memory to make connections between the seven sections of the IEP. A psychologist who responded to a member check described using the group memory to ensure the student's present levels were driving decisions made in other components of the IEP. For example, she recalled a specific meeting where "the student's strength and challenges chart informed decisions about goals which then led

to a quick discussion of how progress towards those goals would be addressed and measured."

When using group memory to discuss all sections, information naturally follows the federal

guidelines. The school psychologist's input continued with, "After progress on goals, we charted

special education and related services which then guided the teams through accommodations and

modifications, transition, and finally the projected start date."

An administrator described working with the staff to prepare and present their present-

level statements, evaluations, or reports in bulleted phrases to prohibit reading long confusing

narratives. This enables the charter to capture the essence of the information on the group

memory and encourages team members to "consider" and "interact" with the information. She

elaborated on how she explains this to her staff,

> We're not going to read the report. We've already given the parent the report, so
>
> hopefully, they've read it. What you want to do is . . . take your highlighter and . . .
>
> [identify] the things that are [important] for the student, things that they're really good at,
>
> what the report tells us. And then, talk about that, not in the numbers, but in how that
>
> impacts Johnny in the classroom. And then, the same with where Johnny has deficits,
>
> how's that going to impact him in the classroom? So those will be our challenges.

She continued to talk about the change in the level of interaction during the meeting and how

using group memory encourages discussion and collaboration. She modeled what it might sound

like when a facilitator and charter work together to visually log decisions made by the team:

> [for] that challenge, we're going to have an accommodation, so we'll put an A beside it
>
> and by the end, we want to get all of those challenges addressed. It might be a goal, an
>
> accommodation . . . part of the behavior plan . . . or on the special factors page with

assistive technology. So, you see, when we do the strengths and challenges . . . we always

mark it up.

Charting each step of the conversation and specifically "marking up" how the team

agrees to address the student's specific needs ensures that all team members are an active part of

the process. Participants report that this also has helped all team members to truly understand the

student's individualized program. One participant mentioned that the visual process "helps

parents see where all of this is coming from. We're not just pulling this out of thin air to try to

put together something for your kid that'll be in place for a year."

This participant described how the conversation is naturally elevated when team

members are focused on a chart or screen with summaries of the student's strengths and

challenges rather than focusing on each other: "There's a lot more discussion in the meeting than

us talking at the parents and there's more collaboration back and forth." She elaborated,

> It becomes a safer environment in some ways because you're just talking. It doesn't
>
> matter if the term is right or [if we are at] the place on the IEP document, it's appropriate
>
> to [give input] because the slides are the conversation guides. Our [IEP] document
>
> doesn't guide the conversations.

One participant described how she relies on group memory during difficult discussions or

"contentious topics." In particular, she mentioned guiding the group to look at the advantages

and disadvantages of all proposals by creating a "pros and cons" chart. Then, as the team works

through each proposal, the visual "is a nice way to highlight why your choices or why the

recommendation you're suggesting . . . has narrowed." Another participant mentioned a similar

experience,

Because a lot of our conversations will end up regarding placement . . . we [chart] the pros and cons of each proposed setting and it . . . has been really helpful. Because for a lot of parents, they want what they want, or a lot of [staff] want to recommend what they recommend, and it's eye-opening to see, "Well, maybe there's another lens that we haven't looked at yet."

In this next example, the team used group memory to move the conversation from determining eligibility to developing the IEP. The team charted the student's strengths and challenges, summarized from the assessments, reports, and other team members' input, and then used that information to determine eligibility. Once the team agreed the child was eligible for specialized services, they used that information to develop the student's individual program:

After the [strengths and challenges data] that we just talked about . . . for eligibility . . . the next step is his plan . . . how we're addressing these challenges and that kind of rolls right into goals page, accommodations, [state] assessment . . . and then you're to [service] minutes and then you're done . . . it really flows.

Participants also described how the visual process, where the team members are "hearing and seeing" the information, promoted more consideration and input among team members. Multiple participants spoke about the increase in parent input and credited using the group memory with creating an environment where parents were being "included in the discussion" and feeling "much more part of the team," "more comfortable," and "empowered."

When participants were asked about using group memory with families utilizing interpretation services, all mentioned using charting to value the family member's input by writing their thoughts and observations on the charts for the rest of the team to consider. As one participant explained:

Their information is recorded [on the chart] and they can see it. It's not like we had it

translated to us, and we go, "Oh, we'll come back to that." It is actually something that

we talk about, but the parent is getting it directed at them.

She went on to describe her art form when facilitating for Spanish-speaking families, "For me,

depending on [the brevity of] what parents say, I've written in Spanish, and then translated it into

English underneath." Even though there was a translator present in the meeting, she was glad to

be able to chart in Spanish as well to ensure the family "sees" that their input is being translated

accurately, is valued, and is a critical part of developing the student's program.

This participant described using the group memory during meetings with translation

feeling relieved, as she noticed the visual tools helping to create an "inclusive" and "consistent"

process:

The format is . . . above and beyond what we used to do . . . because it's translated on the

[chart] or because the interpreter's already seen [the facilitated format], it doesn't feel like

we're making it up on the spot . . . this is how we run our meetings . . . people are

comfortable . . . that's the format we use.

Another educator pondered, "I think that [visuals] help me as a learner. So…if it's helping me,

I'm just assuming it's going to be helping other people."

While all respondents used visuals, they reported different methods for how they

incorporated them into the meeting. For example, during in-person meetings, documents were

either projected, written on large chart paper, or used in a "tabletop" format. One participant

described using the tabletop method, "I [printed] the agenda, the outcomes, and norms . . . that's

how I used the tools. Everybody had a copy of it in their hands and it seemed to work well."

Another participant described using the "tabletop" method to meet her community's culture:

I did tabletop visuals. . . . I felt with my group and demographic, [large charts] would've been intimidating. . . . I think that would've put me in more of an authoritative role, and I didn't want that with my parents.

Presentation programs were common tools used among participants when creating visuals. One participant excitedly reported, "We actually gathered over the summer, and we created PowerPoint slides to help guide the [meeting] for both virtual and in-person meetings." Another team also collaborated to create their structural slides, "We only use Google slides . . . so the agenda, then there's a norm slide, an outcome slide, an introduction, and role slide."

Some participants described using a hybrid method, providing some printed materials while projecting others. One participant talked specifically about the benefit of the hybrid method, "I like the simplification of it as well . . . the simplification of the display and that visualization piece combined with having the IEP right in front of you when you are in a meeting." Being able to use their own style was important to all participants. One director summed this up when thinking about how different teams added their personality to the visuals:

We have people who have taken their own little interpretations and kind of implemented what worked for them. Some of them have a PowerPoint slideshow . . . another teacher has the poster that she loves. That's what I like [about facilitation] . . . you're implementing the process with fidelity, even though you add your own little tweaks to it.

Roles

When team members describe their role during the meeting, it discourages participants from solely stating their name and title name (e.g., parent, teacher, school psychologist). Instead, during the training, participants learn to prompt team members to introduce themselves with their name and their role during the meeting as it relates to the student. Participants described this

technique as a way to "build trust," "empower team members," "increase understanding," and "create ownership" in crafting and implementing the student's individualized program. One participant mused, "I think, this was one of my favorite takeaways . . . the way we introduced ourselves. . . . what our role of was going to be that day." Before the training, she mentioned the downside of team members only saying their job, and provided this example, "I am 'Susan' . . . I'm the teacher." And then expanded with this thought, "Yeah, [the family] might know that . . . but what is your purpose of being at the meeting? Why are you even there?" Another participant provided a personal experience related to the importance of roles stating,

> I'm a parent of a son with dyslexia, so when I go to the 504 meetings, and I'm a professional, and I understand everybody's roles, it's still intimidating, and I don't like it. And I think of all those other parents sitting there going, "I don't even know who these people are, and what their role is in my child's education." I think being clear about the role that each adult plays in your child's education is important.

Another participant added her experience, "In an old traditional IEP meeting, you didn't really do that [explain your role]. It was just, 'Hi, I'm So-and-So, I'm the principal' and then you move on." Participants across the study described how previous introductions, where only titles were provided, created the perception of imbalanced importance or power within the team. For example, after staff introduced themselves with their name and title, the family member's response was often, "I'm just the," as if they are not as important or a part of the actual team.

Not describing the staff member's role was also associated with families having to make assumptions as to why certain team members are invited to meetings, "In an [traditional] IEP, we didn't stop and slow down enough to acknowledge the roles. We just assumed [people understood]. A lot of assumptions were made for many, many years." A psychologist added her

thoughts about potentially negative outcomes of assumptions, "In Mexican American culture [psychologists] are viewed as kind of like, 'What! You are here so there is a [mental health] issue.'" Therefore, she shifted her introduction to provide a clear explanation of her roles as the facilitator and school psychologist. She also emphasized the importance of keeping the role explanation brief such as, "to help move the meeting process along and share testing information."

Another participant provided an example of how she encourages or assists other team members to provide their role descriptions during introductions with a gentle prompt: "If the counselor doesn't say their role, I'm like, 'Can you make sure that we're on track with the courses, and that the courses match the students request?'" She noted how this also helps the team member to know when and what to add to the discussion. Another participant had a similar outcome when working with team members to understand their roles. She provided this example of how the local education agency representative originally introduced himself, "Hi, I'm Mr. So-and-so, the administrator." And then after working with him, he now says, "Hi, I'm Mr. So-and-so, the administrator, and I'm here to allocate the resources and make sure that the team has what they need." She went on to explain that she has seen an increase in the administrator's input particularly related to discussing resources and answering site- and district-level questions. She directly credited this increased interaction to the administrator knowing his purpose in the meeting.

One special education chairperson described how her introduction process pairs a physical tool (name tent) with the verbal technique (role description),

> One of the other things we do is we have name plaques that we put up. So, you have your
> name and then your role [written in front of you] . . . and then as we do the sign-in sheet,

everyone goes around and they explain, "My name is Ms. J. I'm a special education case manager, my role for today is to . . . talk about."

She explained that these tools and technique helps parents feel more comfortable by being able to see the team member's name posted and job in the meeting. She shared, "So that when someone starts talking, they're not sitting there thinking, okay, who is this person? When do they see my child? What do they see them for?"

Another participant also mentioned using laminated name cards or table tents. When planning the meeting with her students, she has them write the names and a brief role statement on the name tents, and then the student decides where each team member will sit. She recalled a conversation with one student when he asked about his role. She responded with, "Your purpose, today is to tell us what we should do to help you learn better, what we need to do that's working and not working." She then added, "and they're like, 'Oh?'" The teacher described how the student was not aware he was allowed to tell the group what helped him and what didn't. This caused her to rethink how she was preparing her students to attend their IEP meetings.

In particular, she was most concerned about the students she did not directly teach. As a case manager in high school, she explained, there are a group of students she does not provide direct service to, but rather monitors and collaborates with their general education and special education teachers. Thus, she now takes the time to meet with each student and talk about the meeting and their role, "I communicate with them. . . . 'You know, I'm your case manager, you see me randomly, but I don't teach you. So, it's really important for you to really speak about your preferences.'"

Many participants recalled learning the importance of helping families come to the meeting prepared to have an active role. This was accomplished by contacting them before the

meeting and explaining their role in the meeting as "to share their child's strengths and challenges as it relates to home and the community." The participants also recalled specific phrasing to help encourage and value the parent's role during the meeting such as, "you're their biggest advocate," "you're [the student's] first teacher," and "you are [student's] voice." As a result, many participants described positive outcomes such as, "I think that it has helped some parents just understand and feel comfortable with the process and also to feel included." A few participants mentioned the positive impact of using deliberate wording to validate the family's role in the meeting,

> What we say matters, and I think that having everyone be clear about what their role is and then having the parent validate their role . . . I just think it creates this broader, shared meaning about what we're here to do, what we're here for.

When thinking about how family involvement has increased, one participant said,

> I think it [roles] does also help with parents' involvement because I think we all have probably been in those meetings where the parent is the last one to speak. I would always strategically want to sit next to the parents, [and say] "We really need your help because without you, we can't make this happen" . . . really giving that parent that ownership.

Before helping families understand their role, participants described meetings as "talking through all this paperwork, and the parent nodding and smiling, and leaving, and having no clue what that was about and that never felt right," or "At the conclusion, there would be a question to parents, 'Do you have any questions? Okay, thanks. You'll get a copy of the paperwork in a week.'" One participant described the significant change in a parent's perception of her participation after introducing roles into the meeting,

One of the first parents we did the facilitation with . . . one of the most difficult ones. Once we did the debrief, she acknowledged [that] she really likes the process, and she felt much more involved. And she acknowledged, which was really great for the team to hear, she felt people were listening.

Building trust was a familiar sentiment among participants in relation to defining roles. This participant summed up this feeling in this statement, "I think establishing those clear roles, as simple as it maybe, helps a parent feel like, 'Oh, maybe I can connect and trust these people.'"

A final positive outcome of defining roles in the meeting was the sharing of responsibility for other meeting processes by assigning efficiency roles. These roles were described by the participants as jobs that anyone on the team can do to make the meeting run smoother and more efficiently. Examples include timekeeper, charter (someone to summarize the conversation on a whiteboard, shared screen, or other visual), action planner (someone to write down action items as they come up), and parking lot attendant (someone to write down items that are non-IEP topics to discuss after the meeting). Thus, the team member may have two roles in the meeting, to provide information related to their area of expertise and to be a "parking lot attendant" to keep track of non-IEP meeting questions and topics.

All participants talked about assigning those roles by talking ahead of time and thinking through whose skillset best fit the role. For example, one participant said, "[when] we do those efficiency roles, somebody's the timekeeper, someone's writing the notes into the IEP . . . it's usually the SLP who does that because they feel more confident to [update] all the areas." Another mentioned the benefit of asking team members who are typically quiet to take on an active role. She mentioned one of her general education teachers participates by helping to chart summaries on the whiteboard or the shared screen during virtual meetings. She noted, "This

makes sure they participate in the meeting instead of just rattling off their information at the

beginning. They're involved in the process more." This participant described how her team

decided to distribute efficiency roles and what the outcome has been:

> My speech and language pathologist has done scheduling with the parents while I go
>
> make copies. Whereas before, that was just always my role. From the training, I
>
> remember anybody could be the timekeeper so the Gen Ed teacher [is] our timekeeper.
>
> People jump in and do some of those other things because we're all sharing the team
>
> process instead of just, 'You're here for this, you're here for that'.

Many participants spoke about the relief of "not having to do everything" during the

meeting. Most facilitators happily gave up the job of updating the IEP paperwork or taking notes

which allowed them to focus on running the meeting. One participant noted, "We've realized . . .

we also need somebody taking notes and somebody entering the paperwork [while] I facilitate."

This participant described sharing responsibility during virtual meetings and their practice of

explaining the role of note taker:

> One of the things that we got in the practice of doing, especially when they're typing the
>
> notes [is explaining] "Hey . . . my [other] role is note taking. If you see me looking [at]
>
> my computer, that's what I'm doing." So, it's really giving that pretext to parents, This is
>
> what I'm doing, this is why I'm doing it. And I think that's just a nice piece that gives
>
> them that reassurance.

Most participants mentioned that the efficiency roles aren't always assigned to the same

person for every meeting. When team members understand the facilitative method and can

perform more than one role, the efficient flow of the meeting occurs across all types of meetings.

For example, if the meeting is an initial, the psychologist may not have a dual role so that they

can focus on disseminating and explaining evaluation results. One participant recalled a time when her charter was called out of a meeting but because other team members understood the process, another team member was able to continue charting so that the meeting was not interrupted.

Facilitative Language

During the training, participants learned how to strategically ask questions, prompt responses, redirect conversations, etc. to facilitate robust, productive conversation and collaboration. Using these language techniques during the meeting was described by participants as a beneficial strategy to increase effective interactions, clarify concepts or jargon, and problem-solve conflicts. Multiple participants were struck by the difference between the presentation of information during a traditional IEP and a FIEP.

One participant provided her insight:

> When I think of a traditional IEP, especially in the Zoom world or even without the Zoom world, I think of teams projecting this document that's kind of like French, and reading through it, and it's not meaningful. Yeah, you ask, "Do you have any questions, or do you have any feedback?" But sometimes it feels like there's a lack of parent participation and they leave the meeting, and they don't even know what they've agreed to.

She explained how changing her process from reading the paperwork to the team to asking questions creates a collaborative conversation. She provided this language sample,

> Now, I like to just say, "Okay, the primary concern is self-directed behavior. How are we gonna [sic] address this, team?" And then that's what leads everyone to talk about [it], [they will say] "Well, I'm addressing it via this goal. I'm addressing it via this

accommodation. I'm addressing it via this daily lesson." Everybody on the team gets to tell how we're addressing the challenge we listed.

As with this participant, asking strategic questions was one of the strongest language strategies named across participants. However, with the distinction that the questions changed from yes-no questions, such as "Do you have any questions?" to open-ended questions such as, "What do you see at home that we might not get to see here?" "[What are] they are really good at outside of school that we could tie into what they're doing here?" and "[What might be] challenging for them outside of school that we wouldn't necessarily know about?" While these examples were geared toward the families, participants reported using the same strategy with all team members. One participant uses this question to elicit input from unusually quiet team members: "What haven't we mentioned that you want to include?" Another participant starts with, "How are things going in the classroom?"

Participants agreed rephrasing questions creates a venue where team members "feel more comfortable" and "start jumping in and asking questions as well." For example, participants reported team members requesting others to expand on a specific thought as well as asking clarifying questions. In addition, all participants mentioned the importance of communicating; however, many didn't realize how much jargon was being used in IEP meetings until it was addressed during the training. One participant shared how she pays more attention now and is amazed: "There's so much jargon, there's so many terms! And if you don't live special ed, the wording on the IEP document is not parent-friendly, that's the nicest way to put it." Another spoke about the challenge with jargon, not only for families but for all team members. A high school teacher provided an example of discussing a student's behavior challenge in common

terms so that the educators were able to understand the student's needs related to their classrooms or during therapy:

> When we talked about the challenges, it's like they got a better understanding of the kid, because it wasn't this formal language [from] his psych reports. It was more about, "Yeah, you know, when you see him and he's doing that, this is probably why." And being able to speak a little less formal . . . this allows teachers to understand the student more and be able to look at the student, and the accommodations differently.

She went on to describe how using clear, common language also invites the student to add their thoughts without feeling intimidated by technical wording. She recalled one meeting where the team was addressing a student's truancy and took a less formal approach: "Having the student speak about [truancy] like, 'So, you want to talk about why you're skipping? Are we doing something that you don't like?' And they laugh because [the teachers] know that's not it." She also felt this bridged a gap or gave the staff a new perspective that aided in developing a better relationship and solution-based conversation: "It helps the Gen Ed teacher [consider], 'Oh, you're right. It's not me. I shouldn't be taking this personally' . . . and hearing the kid say, 'Nah, I just wanted to do it with my friends.'"

Interpreting jargon into a "common language that everyone understands" and can be "translated into their day" was also described as making the IEP content "meaningful." One educator reminds the staff to replace evaluation terms with common terms and then provide an example related to schoolwork. She recently attended a meeting where "spatial reasoning" was being discussed and was delighted that the team provided information in practical terms: "You're a visual learner, if you see things, you probably understand it so you're going to need lots of

visuals." This was not only powerful for the student, but also for the staff in understanding how to implement the service plan.

> When they walk out, they have a good understanding of . . . the kid's learning ability . . . because we didn't just throw [out] a bunch of terminologies. I've had a lot of teachers [say], "Oh, I didn't realize that," especially with accommodations."

Participants also agreed that changing how they present information and when they strategically engage certain members has been a critical part of increasing productive participation. As demonstrated in the previous section, participants noticed a dramatic increase in general education participation due to visual charting. This experience was accentuated through language prompts or modeling. One participant described her general education teacher becoming more comfortable after hearing from other team members:

> I think when they start to see and hear from the different members, [about] how it's demonstrated for them in their setting, and at home . . . I think it just kind of opens the eye for the general ed teachers.

Another participant had a similar experience: "I think [when] everybody around the table is sharing the strength and you're not sharing anything. It doesn't make you look like you're on [the] team." This also created a change in the type of information general education teachers were providing. One educator described how she noticed some providers' input has become more substantive and relevant:

> Hearing everybody, and how they relate it to either academics or their service . . . they kind of . . . get it. And so, we're stepping away from the personality adjectives, so it's not just the [student is] sweet and kind. They're actually bringing more strengths academically or things that are more relevant in the classroom.

Another outcome of carefully worded questions or prompts is the ability to create an inclusive environment where all team members are valued as experts. Using facilitative language and strategic questioning encourages everyone to share their data, experiences, and observations gaining a "more holistic approach to a child." One participant explained how getting useful information allows all team members to support the student in school and home and "wrap around that support . . . we have them for six hours, the rest of the time they're at home. . . . It really makes the parent a part of our team." She went on to describe how valuing all team members as experts also creates a stronger team:

> I . . . wholeheartedly believe the school team . . . is an expert on process and techniques and interventions, but we are not the only experts on the child. So, getting that feedback for what's happening at home . . . helps us become that team . . . in the traditional presentation of an IEP, it's like, okay, we drafted this document, what do you think?

A director was pleased to observe her staff "being more mindful" of "using . . . the language that was recommended in facilitated IEP [training], to make the parents feel more a part of the conversation, rather than being talked at." She emphasized how the staff's language visibly made the family feel "more comfortable" and realize that they were "not the only ones that don't understand . . . or have a question." Phrases and questions that she heard from her staff included: "Can you clarify that?" and "Can you explain why that's in [the IEP]?" She went on to explain how staff-to-staff questioning prompted the family member to add, "I was wondering that same thing!" The director mused, "It's been interesting because it's opened the door to a lot more dialogue at meetings." Another participant mentioned embedding active listening, sharing how she recently used paraphrasing to "capture what the parent had said" and demonstrate that she was listening, emphasizing the importance of the comment and ensuring other team members

were also listening. Paraphrasing also provides the speaker with validation and the opportunity to correct the message.

Trust and relationship building were common terms when talking about facilitative language's effects. When team members chose their words carefully, they noticed others sharing more openly. Some participants reported leaving traditional IEP meetings feeling that there was something not being said: "We don't really get down to the meat of what we really need to talk about." However, when using strategic, empathetic language, "people feel a little more comfortable and vulnerable, to share hard things." This is particularly important during difficult conversations or when there is conflict.

Multiple participants mentioned pairing facilitative language and visual tools during high-stress meetings as useful in "redirecting," "refocusing," "validating," and "working through disagreements." In addition, using these tools and strategies together provide a strong method for dealing with unwanted behavior. While visual charts such as the outcomes, agenda, and norms are introduced at the beginning of the meeting to provide a meeting structure, they can be used during the meeting to intervene in negative actions such as arguing, disrespect, interrupting, and closed-mindedness.

One participant described how she pairs the visual agenda to redirect a team member who is hijacking the meeting or veering off task. She politely interrupts and says something like, "Oh, that's good information. Now, let's look back at the goals," pointing to the agenda for emphasis. She has also used the timekeeper to "kindly redirect a long talker" by asking for a check-in on time when a team member is going on too long. Many participants talked about using norms to remind team members that everyone agreed to operate amicably. When used as an intervention, the facilitator refocuses the group on the agreed-upon norms and reviews the norm that

specifically addresses what is happening. One participant provided an example of how to interrupt disrespectful behaviors by pointing to the norm and asking the team member or the entire team, "Are we still able to respect the views of others?" She went on to explain if many norms are being violated, that she reviews all or multiple norms such as "be open to the ideas and views presented and communicate clearly and listen carefully" and then regains agreement or takes a break.

Another way an IEP team can handle conflict is to invite a neutral facilitator to run the meeting and help the team members communicate effectively. A neutral facilitator is someone who does not provide services to the student and is there to concentrate solely on the meeting process, help team members communicate respectfully and effectively, and ensure the team stays focused on the student's needs. One participant, who described her job as a neutral facilitator, shared how she uses neutral phrasing to help teams communicate:

> I think my best takeaway from FIEP is [how] the neutral facilitator really helps . . . filter out some of the noise . . . if you're just complaining about a certain program or a certain teammate or a certain process, what you can say is, "Well, what I hear is the real issue of communication," or "What I hear is the . . . the lack of consistent staff." You have that opportunity to bring everybody back to the issue at hand, versus going off on a tangent, which sometimes happens in that traditional IEP model.

Another language strategy used to redirect unproductive or negative interactions is to remind the team that they are all here to focus on the needs of the student. This is established early in the meeting during the setup and throughout the meeting by using the student's name in verbal prompts and questions as well as on all charts. This may sound like, "What proposals does the team have to address Shana's reading comprehension question?" or "Let's start by

celebrating Amir's strengths." This strategy was talked about by many participants and was

summarized nicely through this thought: "I know for our more contentious IEPs, it really helps

us keep the student at the forefront. being more [student centered] and solution based."

The overarching takeaway from all participants was the ability to move the meeting

process and enable the team to develop the student program collaboratively. This respondent

associated using facilitative tools and techniques with providing good customer service to

families:

> I've always been about customer service . . . how can [we] treat our parents . . . our
>
> customers. It's all about, "What's the parent experience?" We started doing parent
>
> surveys, that year we were starting FIEPs, and we got such good ratings on all of our
>
> meetings.

Ultimately, all participants agreed that FIEPs resulted in a well-designed, individualized

program and helped to develop ongoing trust among all team members. A final thought from one

participant exemplifies this, "I think . . . it walks away creating a really good partnership with the

school [and family]." Continued research on the use of facilitation tools and techniques and the

effects of implementing them in FIEP meetings will inform future research in this area.

CHAPTER V

DISCUSSION AND CONCLUSIONS

The purpose of this study was to investigate the experiences and perceptions of educators who attended the FIEP CPR training and identify associated outcomes experienced during a meeting once the trained educators implemented tools and techniques from the training. The previous chapter presented the results of the study as they related to the two research questions. Information gathered was collected through interviews with 11 participants across the midwestern and southwestern United States. Data from the interviews were analyzed and coded to develop themes.

The findings from the study were overwhelmingly positive and provided meaningful insight into adult learning preferences and best practices in preparing for and facilitating collaborative IEP meetings. It is important to note that no tools and techniques mentioned by the participants are superior to another. But rather, the data provide an array of strategies the educators identified to best fit their team member's needs and their art form as a facilitator. This chapter addresses how the data answered the research questions and analyzes whether the results follow common trends in previous research. Specifically, this chapter includes a discussion of major findings related to the literature on adult learning theory, FPPs, IEP meeting practices, and FIEP techniques. The discussion is divided by each research question. The chapter concludes with implications for practice, limitations of the study, future research possibilities, and a brief conclusion.

Research Question 1 Findings Related to Current Research Literature

Q1   What are the experiences of licensed educators who participated in the FIEP CPR training?

The training experiences for in-service educators who participated in the FIEP workshop formed a multi-dimensional category, valuable training experience, divided across four supporting themes: (a) engaging learning environment; (b) experienced knowledgeable trainers; (c) opportunities to practice new skills; and (c) opportunities to collaborate. Each theme is described in detail in the following sections. In the first and second themes, the participants highlighted specific methods used to teach the process that allowed them to successfully learn new skills and subsequently transfer those skills to conduct a collaborative, conversational, and compliant IEP meeting. This is strong feedback from the participants as it ties directly to adult learning and what we know about what works for adult learners.

Engaging Learning Environment

Understanding what teaching strategies are effective for preparing educators to meet job-related expectations is critical in developing competent, confident professionals. In the field of education, teachers and support staff are not only tasked with having pedagogical content knowledge but also with how to interact and collaborate with colleagues, parents, and community partners. Unfortunately, there is a lack of sufficient preparation coursework for preservice educators and effective professional development for in-service educators related to developing meaningful partnerships and conducting collaborative, effective IEP meetings (Beck & DeSutter, 2020; Kyzar et al., 2019; Mueller et al., 2019).

Fortunately, effective professional development activities have been studied for more than three decades (Sims & Fletcher-Wood, 2021). The concepts of Andragogy and Adult Learning Theory are strongly supported throughout this research. Both posit critical characteristics necessary to address adult learners' needs: (a) acknowledging the learner's prior experiences; (b) unique skills set, beliefs, and perceptions; (c) offering self-directed activities; (d)

identifying the relevance of the information to the learner's life; (e) linking learning objectives to training outcomes, activities, and resources; (f) allowing for dynamic collaboration with peers; and (f) instructors and offering practical, real-life scenarios and practice opportunities (Allen et al., 2022; Chen, 2014; Cox, 2015; Green & Cassani, 2020; Knowles et al., 2005; Rodríguez Aboytes & Barth, 2020). Thus, researchers agree, training and coursework that integrates reciprocal learning, a safe, collaborative environment, direct, and content-focused instruction paired with interactive, contextualized activities, modeling, coaching, and practice result in positive, meaningful, and effective outcomes (Allen et al., 2022; Chen, 2014; Cox, 2015; Darling-Hammond et al., 2017; Green & Cassani, 2020; Knowles et al., 2005; Rodríguez Aboytes & Barth, 2020; Sims & Fletcher-Wood, 2021).

Findings from this study indicated each of these characteristics as being effective strategies used during the training. At the start of the workshop, the trainers introduced the format of the training and learner expectations, encouraged participants to ask questions, make alternative proposals to accommodate diverse learning styles, and ultimately agree on the training outcomes, agenda, norms, and use of the manual. During the FIEP training, participants had multiple opportunities to engage in interactive discussions and problem-solving scenarios. These adult learning principles not only initiate the learning process but also establish content focus and content relevance and involve the learner in the training structure and learning process. Each coincides closely with research on Adult Learning Theories and Transformative Learning Theories (Darling-Hammond et al., 2017; Cox, 2015; Purwati et al., 2022; Rodriguez Aboytes & Barth, 2020).

Experienced Knowledgeable Trainers

Mention of trainer expertise occurred across all participants as being an important component of their effective learning. Specifically, participants mentioned having a better understanding of the concepts when the trainers delivered the content and then provided personal examples based on their experiences in the field. Darling-Hammond et al. (2017) name one effective quality of professional development as being content-focused, discipline-specific curricula, that is delivered in a job-embedded natural environment (i.e., the classroom). When this is not possible, such as receiving coaching and training during an actual IEP meeting, having trainers who provide "real-world" examples and demonstrations to support content acquisition allows for coherence in learning.

Participants also mentioned feeling valued each time the trainers acknowledged their experiences and expertise. Valuing the learner's expertise, qualifications, and previous experiences establishes rapport and respect between the trainers and learners. In addition, it acknowledges the learners as "resources for new learning" (Darling-Hammond et al., 2017, p. 7). Chen (2014) also reports recognizing the learner's previous experiences during training increases positive training outcomes such as self-directed engagement, motivation, and collaboration among peers. Other studies describe the transition from viewing the trainer as a teacher to a facilitator who guides a collaborative, transformative learning process as critical in creating self-directed, transformative learning (Chuang, 2021; Darling-Hammond et al., 2017; Rodriguez Aboytes & Barth, 2020). Multiple studies define transformative learning as changing fixed perspectives, mindsets, and habits to more open, reflexive, and flexible beliefs to incorporate these new concepts or skills into everyday activities (Cox, 2015; Darling-Hammond et al., 2017; Purwati et al., 2022; Rodriguez Aboytes & Barth, 2020). Training participants reported engaging

with expert trainers who encouraged them to share their experiences and apply new skills to previous situations, the learning became more meaningful, applicable, and sustainable (Rodriguez Aboytes & Barth, 2020).

**Opportunities to Practice
New Skills**

The concept of practicing the new skills was described by participants as "helpful, necessary, meaningful, and crucial" in preparing to implement the techniques after the training. Practice activities experienced in the FIEP training included role-playing, think-pair-share, triad-conflict problem-solving, and language scripting. While all activities were highly regarded, role-playing emerged as the strongest interactive practice opportunity in helping participants to have a better understanding of how to conduct a FIEP meeting. Drawing on literature from transformational learning, participating in real-time, concrete simulations and problem-solving scenarios, is an effective catalyst for aiding in individual or group systems change (Bentz & O'Brien, 2019; Hoe & Greulich-Smith, 2022; Rodriguez Aboytes & Barth, 2020). When learners engage in roleplays or other planned learning activities that challenge their frame of reference, they experience a process of observing other's points of view or style, testing old practices, reflecting, and seeking input from peers and trainers. It also aids in reorienting theory to practice (Green & Cassani, 2020; Hoe & Greulich-Smith, 2022). The positive outcome of active learning is intensified when students are provided initial instruction on new skills, given a model or demonstration, and presented with explicit process expectations. This also sets the learner up for a safe learning experience and scaffolds skill acquisition to support true understanding and long-term transformative learning (Allen et al., 2022; Hoe & Greulich-Smith, 2022; Rodriguez Aboytes & Barth, 2020).

During the training and before the roleplay, explicit skill instruction and video or live demonstration was provided to help the learner grasp the new concepts. Then, the participants and trainers debriefed the demonstration to dissect what the learners observed. Next, the participants were asked to facilitate a portion of an IEP meeting similar to the demonstration.

After each section, direct peer and trainer feedback and coaching were provided. In addition, any overarching questions from the group related to the observation were answered by the trainer. Breaking the facilitator's role into small parts of the IEP meeting allowed the participants the opportunity to practice, observe colleagues practicing, and benefit from receiving individualized feedback and coaching (Cox, 2015; Weber-Mayrer et al., 2015). Researchers maintain that deliberate practice paired with real-time coaching and feedback strongly contributes to the identification, acquisition, and mastery of skills (Allen et al., 2022; Cheng & Hackworth, 2021; Hoe & Greulich-Smith, 2022). In addition, a peer coaching design provides an opportunity for participants to observe different art forms and hear varying perspectives (Weber-Mayrer et al., 2015).

In a study by Mueller et al. (2019), teacher candidates prepared for and conducted a simulated IEP (SIEP) meeting. Preparation strategies involved learning about the individual academic, behavioral, and social needs of a case study. Candidates also prepared all necessary IEP components on mock IEP documents and attended a workshop on research-based IEP meeting strategies. Participants in the study were interviewed after completion of the course. Results indicated that planning, observing, and conducting the SIEP was a valuable, beneficial, and helpful learning experience in preparing the pre-service teachers for actual IEP meetings. Interestingly, while all participants agreed the SIEP project helped prepare them for their first IEP meetings, many indicated the need for even more opportunities to practice these necessary skills in "real world applications" before entering into a teaching position (Mueller et al., 2019, p. 221). This finding is supported by extant research on pre-service and in-service educators' lack of confidence and competence in implementing IEP-related competencies as well as collaborating effectively with families and colleagues (Beck & DeSutter, 2020; Green & Cassani, 2020; Hoe & Greulich-Smith, 2022; Kyzar et al., 2019; Lake & Billingsley, 2000; Murray et al., 2008; Tran et al., 2018).

Opportunities to Collaborate

Opportunities to collaborate with colleagues occurred throughout the training and provided site teams the time to practice their artform, develop next steps in implementation, plan for an upcoming meeting, create individualized visual tools (e.g., agenda activity), and discuss learned concepts. When colleagues have shared experiences, interests, and goals, productivity and motivation increase (Cheng & Hackworth, 2021). Participants identified this piece of the training as helpful in hearing others' perspectives as well as being able to observe and provide feedback. Hoe and Greulich-Smith (2022) supported peer reflection and feedback in developing meaningful conversations, building empathy, and inspiring change.

During large-group discussions, the trainers and participants engaged in an ongoing interactive dialogue. While the trainers provided guided insight, they also encouraged the participants to collaboratively think through how specific tools and techniques could aid in situations they have experienced. Creating opportunities for the learners to apply the skills to "real-world" situations acknowledges the individual needs of each participant's experiences (Cheng & Hackworth, 2021; Weber-Mayrer et al., 2015). Peer-to-peer and trainer-to-student interaction are sighted as effective characteristics in the transformative learning processes (Purwati et al., 2022; Rodriguez Aboytes & Barth, 2020). Reflection, discourse, and collaboration in both formal and informal venues enhance understanding of new concepts, and other's perspectives, and allow for safe questioning, debate, and the modeling of new skills in various scenarios (Rodriguez Aboytes & Barth, 2020; Tran et al., 2018). As the number of English Learners identified as having a disability increases, it is crucial to encourage colleague observation and collaborative problem-solving when preparing for and conducting culturally and linguistically responsive IEP meetings and improving engagement with families of diverse learners (Tran et al., 2018).

Research Question 2 Findings

Q2   How does the experience of the training inform or shape the team member's outcomes of the IEP meetings?

Improved the Individual Education Program Process

"Meetings also can elicit all kinds of emotions. One can walk away from a meeting feeling energized and inspired, or walk away from a meeting feeling drained, demoralized, disempowered, and/or defeated" (Molaro, 2019, p. 2). The ill effects of a poorly executed meeting have been described as a waste of time, overwhelming, and exhausting (Allen et al., 2016). In an interview study by Perlow et al. (2017), one respondent described dealing with a frustrating meeting by "stabbing her leg with a pencil to stop from screaming during a particularly torturous staff meeting" (p. 64). Poorly planned meetings and negative meeting characteristics seem to be an epidemic as they have been studied repeatedly throughout literature and across industries (Kreamer & Rogelberg, 2020; Leach et al., 2009; Molaro, 2019; Perlow et al., 2017).

Participants across the study described preferring the FIEP meeting process and described a dramatic difference between the traditional IEP meeting and the FIEP. As mentioned, common characteristics of the traditional IEP included reading the IEP document page by page, reporting data one service provider at a time, and team members waiting for a "turn to speak" or just listening rather than engaging in collaborative conversation. When conducting the FIEP, participants described the meeting as an organized, but interactive, discussion about the child that uses a "growth mindset" approach to addressing all required components of the IEP outlined. This organized, collaborative meeting methodology also answers federal requirements regarding collaboration between educational staff and families when developing the student's IEP (IDEA, 2004; Yell et al., 2022) as well as over four decades of research on unfavorable IEP meeting procedures and barriers prohibiting a meaningful, collaborative IEP meeting process (Childre & Chambers, 2005; Fish, 2008; Mueller, 2017; Mueller & Buckley, 2014; Zeitlin &

Curcic, 2014). One strong theme contributing to the improved meeting process was an increase in preparation for upcoming meetings.

Increased Team Preparation

Pre-IEP meeting preparation is not a new concept. In fact, IDEA regulations allow team members to hold informal "preparatory activities to develop a proposal or response to a parent proposal that will be discussed at a later meeting" (34 C.F.R. §§ 300.501(b)(1) (b)(3)). Certainly, one important stipulation for these meetings is to ensure that they are not considered formal meetings where decisions are made without the fully constituted IEP team members present. Doing so would be deemed predetermination. Because the IEP meeting intends to share information and engage in productive group decision-making and problem-solving, the team members must come with an "open mind" but not a "blank mind," meaning team members have prepared information about the student's strengths and needs as well as proposals for how to address the student's needs but are open to hearing new information and proposals from all team members (Leach et al., 2009; Yell et al., 2022).

Preparing the meeting structure also increases effectiveness and improves collaboration, team performance during and after the meeting, morale, engagement, empowerment, and job satisfaction (Allen et al., 2016; Molaro, 2019; Perlow et al., 2017). When talking about preparing for a traditional IEP, many participants recalled completing one or two tasks such as developing a draft document and sending it to the family before the meeting and sending information sheets to general education teachers requesting information about the student's progress in their classrooms. Recounting how they prepared for a FIEP meeting, participants described intentionally considering how to organize the meeting process, communicate with team members before the meeting, and prepare and share drafted content.

All participants mentioned preparing specific structural elements learned in the training to create an effective, efficient, collaborative, and transparent FIEP meeting. Elements named by participants included preparing an agenda, outcomes for the meeting, and group norms. Descriptions of how these (and other tools) were used during the meetings are illustrated throughout the next category. Helping team members to understand their roles and what to expect was consistently named as an essential activity during the preparation phase. This is supported by research on effective meeting processes across medical, business, and educational disciplines (Allen et al., 2016; Molaro, 2019; Perlow et al., 2017). In addition, Beck and DeSutter's (2020) study of IEP facilitators' perception of an ideal IEP meeting indicated a key component to helping team members prepare for the meeting was to meet with them to describe what to expect during the meeting and/or review the agenda.

When considering who is invited to attend the FIEP meeting, it is necessary to understand the purpose of the meeting and what team members will aid in accomplishing the meeting tasks. IDEA (2004) names who are required to attend the meeting but provides little guidance as to their specific role during the meeting. Certainly, many of the roles seem intuitive (e.g., a speech pathologist is there to provide information related to the student's communication strengths, challenges, goals, and proposed services). However, multiple study participants reported team members attending meetings because they "had to be there" but didn't understand their purpose in the meeting, adding to feelings of frustration and viewing the meeting as a waste of their time.

Research corroborates these emotions and perspectives specifically when a team member does not feel they need to be in the meeting (Allen et al., 2016; Molaro, 2019). Participants also reported parents feeling overwhelmed by multiple team members' presence, particularly when they didn't have a role. Thus, strategic planning as well as working with all team members

before the meeting to understand the FIEP process and their individual roles had a positive

impact during the meeting. This includes an increase in team member participation and

understanding of the meeting process and content.

Increased Participation and
Understanding

One outcome of the FIEP meeting, as taught in the training and supported by the manual,

is an efficient guided meeting where a collaborative team shares responsibility for the meeting

process and results (Little et al., 2013). This is achieved by facilitative behaviors such as asking

strategic questions, clarifying complex information, and encouraging all team members to share

observations and data. However, effective collaboration requires team members to feel safe,

valued, and trusted. In addition, understanding the process and content of the meeting aids in

eliciting input from multiple perspectives. These meaningful interactions and partnerships

positively affect the student's unique programming and contribute to student achievement and

engagement (Francis et al., 2020; Oswald et al., 2018).

During this study, participants reported an increase in team member participation due to a

better understanding of how the IEP meeting works and a better understanding of the student as a

"whole child." Respondents felt these changes were a direct result of team members coming

prepared to share their information in a format that is understood by all. In addition, participants

reported an increase in parent participation due to learning how to engage all team members

during the discussion and use the FIEP process to ensure meaningful and equitable collaboration

and contributions. This is an exciting outcome of the study as educator competence and

confidence in establishing positive FPPs and conducting formal conferences or meetings remain

a significant issue in teacher preparation (Beck & DeSutter, 2020; Elbaum et al., 2016; Kyzar et

al., 2019; Mueller et al., 2019). In addition, equity of participation continues to be a focus of

research on IEP meeting practices. Multiple studies on IEP meeting participation and barriers to collaboration reveal families feeling an imbalance of power when they feel they are the only one representing their point of view, are not provided opportunities to give input, or do not feel they have an active role during the meeting (Francis et al., 2020; Gershwin, 2020; Lake & Billingsley, 2000; Mueller & Buckley, 2014; Mueller & Vick, 2019).

Organized and Consistent Process through Strategic Tools and Techniques

Five tools and two techniques were identified by participants as being critical in conducting an organized and consistent FIEP meeting. During the training, participants were introduced to specific research-based meeting tools, also known as visual charts, to provide a meeting framework that keeps team members focused, encourages an interactive respectful environment, and promotes dynamic collaboration from all team members. Study participants repeatedly named six tools they used to achieve successful meeting outcomes. These are: (a) agenda, (b) outcomes (c) parking lot (d) norms, and (e) group memory. These activities are supported through effective meeting strategies used across a variety of professions including, education, medicine, and the business industry (Kreamer & Rogelberg, 2020; Molaro, 2019; Mueller & Vick, 2019).

Agenda

All participants in the study used the facilitated IEP agenda to plan with team members before the meeting and keep the discussion compliant and conversational during the meeting. One barrier to meaningful and productive IEP meetings is navigating confusing processes and a focus on paperwork. Team members often report getting bogged down with making sure that the paperwork is completed correctly, resulting in less focus on the intended collaborative discussion

when crafting the student's individualized program (Gershwin, 2020; Lake & Billingsley, 2000; Mueller & Vick, 2019).

An agenda that is constructed to accomplish the meeting outcomes in a conversational manner improves the effectiveness and perceptions of the meeting (Allen et al., 2016; Mueller & Vick, 2019). In addition, collaboratively constructing and using an agenda is recommended by experts in meeting frameworks to increase successful meeting completion (Leach et al., 2009; Molaro, 2019). In a study investigating team members' experiences with the FIEP meeting process, findings indicated using an agenda guided the meeting, ensured transparency, and maintained order. It also allowed all team members to see IEP meeting topics and focus or refocus on the item being discussed. Additionally, using an agenda consistently throughout the meeting built trust among all team members (Mueller & Vick, 2019). Barriers such as mistrust between families and professionals, confusion about IEP meeting processes, and a feeling of exclusion from the discussion can all be addressed through the use of a strategically and carefully designed agenda.

Outcomes

Meeting effectiveness can be measured through the achievement of meeting outcomes. An outcome chart was identified by participants as useful for establishing "visual goals for the meeting" and increasing understanding of the IEP team's work to be accomplished. Research on meeting structures and practices recommends using meeting outcomes as the "destination" or explicit goals of the meeting and phrasing outcomes in action statements to establish purpose (LeBlanc & Nosik, 2019; Molaro, 2019).

Participants in this study agreed that the FIEP meeting outcomes assured the IEP agenda topics are covered as the facilitator carefully crafts the agenda as the process to achieve the

outcomes. In addition, understanding the outcomes of the meeting also aids in knowing who needs to be in attendance as it is possible that some decisions cannot be made unless specific team members are present (LeBlanc & Nosik, 2019). When the team agrees to the meeting outcomes at the beginning of the meeting, they can be used to intervene in off-topic discussions and tangents (Molaro, 2019). Any items that arise outside of the agreed-upon meeting outcomes can be written on the parking lot to be addressed after the conclusion of the meeting.

Parking Lot

A parking lot is a visual chart used to record questions or concerns that are not directly related to the purpose of the FIEP meeting (e.g., returning library books, questions about class projects, etc.). Because the information is important and should be addressed at some point, writing it on the chart validates the speaker's input but assigns a process for handling it without disrupting the flow of the meeting (Mueller & Vick, 2019). This efficiency tool also helps with time management as it can be used to redirect information when not relevant in a respectful but timely manner.

Participants indicated the importance of establishing the purpose and use of the parking lot at the beginning of the meeting. This was also an important process step named in other research studies that use the parking lot tool (Molaro, 2019; Mueller & Vick, 2019). In addition, taking the time to "unpark" the items at the end of the meeting developed trust in the facilitator as well as the meeting process. Because the topics are not a part of the IEP meeting discussion, team members whom the topic does not involve can exit the meeting and return to their assigned duties. If an issue cannot be addressed at that time, it can be moved to an action plan where the task is delegated to the appropriate person and a specific date is set for completion. This eliminates ambiguity and increases accountability (Molaro, 2019).

Norms

Meeting norms are found in extant studies on conducting effective meetings and creating inclusive workgroups. The purpose of establishing norms is to develop a framework where individual team members feel safe, trusted, respected, supported, valued, and engaged (Ferdman et al., 2013; Molaro, 2019; Mueller & Vick, 2019; Perlow et al., 2017). Ferdman et al. (2013) explained how norms create the "we" in a workgroup establishing that all team members "have the right to be there and have an equal voice" (p. 12). This is particularly important in addressing barriers to inclusion during IEP meetings such as limited voice, confusing terminology and processes, and power imbalances (Gershwin, 2020; Kyzar et al., 2019; Lake & Billingsley, 2000; Mueller & Vick, 2019). This is intensified for families whose primary language is not English or who are not European Americans facing systemic barriers such as school personnel "relegating CLD families to listening, passive roles and lacking cultural awareness" (Rossetti & Burke, 2019, p. 216; Rossetti et al., 2017).

Participants in this study agreed that proposing norms to the team at the beginning of the meeting sets a tone for an efficient, collaborative, conversational discussion. They also indicated that the norms helped deal with negative or unproductive behaviors. Proposing the norms at the beginning of the meeting and then confirming agreement to follow the collaborative guidelines also creates a sense of cohesion and focus among group members (Molaro, 2019). In a study by Mueller and Vick (2019), participants described norms as "clearly stated behavioral expectations for the meeting" (p. 75). Respondents in that study also indicated feeling empowered to redirect the team to the agreed-upon norms, to de-escalate negative emotions or actions. Experts in the field of organizational management recommend addressing known issues within the norms as prevention for disruptive, off-task, or unproductive behaviors such as the use of technology, side-

bar conversations, respecting the allotted time, etc. (Ferdman et al., 2013; Molaro, 2019; Mueller & Vick, 2019; Perlow et al., 2017).

Group Memory

The group memory is a graphic charting system that captures the conversation during each section. Participants from this study reported using group memory charts to summarize and translate the team members' thoughts, data, and proposals into understandable text and images for the entire team to see, consider and discuss. When team members present their information, one person's role is to summarize that information visually into bite-sized phrases. This visual tool is also referred to as graphic recording and is used across professions in meetings to offer a venue for a rigorous discussion. Using this method during group discussions promotes understanding, increases communication, coordinates teamwork, provides processing support, and reduces time spent recalling information (Gergle et al., 2013; Paul et al., 2004). It is important to note that group memory is not the meeting notes. Instead, once the discussion has occurred and the team collectively agrees on information to be added to the IEP, then only that information is transferred to the legal documents.

This method has been useful in aiding discussion with persons whose primary language is not English. Jung (2011) noted oral translation without useful visual supports insufficiently assists parents in focusing, interpretation, and understanding the IEP. Participants from this study described similar perceptions indicating that writing the families' thoughts on the chart for all team members to consider helped to value the input and ensure all voices were considered equally. When the speaker's words are visually summarized, the group members have the opportunity to consider the information and ask clarifying questions. Translators also appreciated the tool in helping them translate the information accurately.

Mueller and Vick's (2019) research describe this technique as a collaborative tool that promotes active team discussions. Team members view the information together which provides a reminder of key discussion points and encourages active participation. Furthermore, the visuals aid in complex decision-making, focus, and navigating problem-solving conversations (Gergle et al., 2013; Mueller & Vick, 2019; Paul et al., 2004;). Group memory can be displayed in various methods including electronic projection, laminated charts, large paper charts, or on whiteboards.

Facilitative techniques named by participants that created an environment where all team members shared responsibility and engaged in productive conversations were: (a) defining roles, and (b) using facilitative language. In addition, these techniques aid teams in communicating effectively so that each team member feels valued and heard, and the information provided stays focused on the needs of the student. Each technique is described below.

Roles

Roles in a FIEP meeting refer to the team members' jobs that they have during the meeting related to the student. It is critical to help individuals understand that their role in the meeting is not only their title or position within the school or home setting but rather a description of what information they will be sharing as it relates to the student. In this study, helping team members to understand their role before the meeting was mentioned as a critical activity in ensuring team members came to the meeting prepared to share their expertise which ultimately increased participation during the meeting. Beck and DeSutter (2020) recommended that facilitators help to define the roles of meeting participants so that expectations to be effective team members are clear for all involved. An example of a role description for a family member may be, "I'm Mrs. Cruz, and my role today as Elaina's parent is to share information that we see at home, in the community, and during therapy sessions." This practice promotes

inclusion, high-quality exchanges, and agency (Chung et al., 2020). It is also supported by literature on effective and efficient meeting practices as well as studies supporting meaningful and collaborative FPPs (Francis et al., 2016; Gershwin, 2020; Larios & Zetlin, 2018; Rossetti et al., 2020).

In addition, participants from this study described assigning "efficiency roles" to team members to share responsibility for the meeting process. Examples include timekeeper, scribe, notetaker, and parking lot attendant among others. Again, when these roles were assigned ahead of time, the facilitator can determine who may be the best "fit" for the specific job and provide a clear explanation of expectations. Sharing tasks in meetings also promotes trust, improved relationships, and follow-through on tasks after the meeting. In addition, role distribution reduces the stress of juggling multiple tasks during the meeting and allows the facilitator or other key team members to focus on other important issues such as helping the team to communicate and listen effectively (Allen et al., 2016; Beck & DeSutter, 2020).

Facilitative Language

A productive facilitator must be able to utilize structural tools to guide the meeting and facilitative techniques to build and improve relationships, increase effective communication, navigate conflict, and focus the conversation on the needs of the student (Little & Little, 2018). During the FIEP training, participants practiced communication techniques such as asking strategic open-ended questions, prompting responses from multiple team members, and redirecting conversations. Participants also learned how to listen and help others listen so that the speaker felt valued and heard. After the training, respondents reported successfully integrating learned facilitative language techniques such as restating information in clear, common

language, clarifying jargon, pairing information with visual charting, and using empathic statements.

Strategic communication techniques are supported throughout literature related to team decision-making, collaboration, and effective and inclusive meetings (Allen et al., 2016; Beck & DeSutter, 2020; Graesser et al., 2018; Johnson et al., 2020; Mueller & Vick, 2019; Perlow et al., 2017). In addition, studies in organizational management promote using explicit prompts and questioning to ascertain whether the team members understand the information and clarify or adjust as needed (Graesser et al., 2018; LeBlanc & Nosik, 2019). In a study investigating problems that occur during IEP meetings and facilitator techniques to address them, findings indicated listening to others and asking specific questions as an effective technique in showing empathy, valuing the listener, and encouraging participation (Beck & DeSutter, 2020). The importance of learning specific communication techniques was also supported in a study by Muller et al. (2019) where preservice special education teachers prepared for and conducted a simulated IEP meeting. Participants reported practicing communicating and collaborating with the simulated IEP team members enhanced their parent and colleague collaboration and communication skills.

Implications for Practice

There are two main implications for practice resulting from this study, *future training, and implementation*. These needs align with past research that found attending structured training and then using the learned tools and techniques improves understanding of the IEP process, increases participation from all team members, and enhances the meeting outcomes.

Training

        The research included in the literature review as well as the findings from this study reiterate the need for focused instruction on how to communicate and collaborate within school teams and among FPPs (Epstein & Sanders, 2006; Kyzar et al., 2019; Murray et al., 2008). Multiple participants wished they had the training before teaching and how disappointed they were that they had never received specific training on how to conduct an IEP or how to work with different personalities and levels of expertise. It is important to note, not all participants in this study were classroom teachers. In fact, some of the strongest feedback related to desired training needs came from the school psychologists and speech therapist. This signals the need to provide training for specific groups. These findings alert content experts the need to focus on these critical skills rather than embedding snippets into pre-existing courses or professional development workshops or at a minimum devoting ample time to learn and practice the new skills.

        Participants also reported the trainer's expertise, paired with interactive discussion and practice, created a positive training experience and increased their ability to apply the information immediately, and long after the training ended. As educators and administrators in special education who have conducted hundreds of facilitations, the skilled trainers brought unique expertise related to delivering differentiated instruction such as direct instruction, demonstration, coaching, and feedback as well as creating an engaging, relevant, and practical training experience. These findings highlight the importance of offering preservice courses and in-service workshops using adult learning strategies. With this in mind, findings from this study can be used to inform the instructional design of the courses and workshops to meet the unique needs of non-traditional learners.

Implementation

Another major implication for practice is to increase the fidelity when implementing the FIEP meeting tools and communication strategies. Participants in this study and previous studies (Mueller & Vick, 2019) agreed that using specific facilitative procedures and organizational tools is critical for conducting an organized, effective, and collaborative FIEP. After receiving high-level, quality training on IEP facilitation, I suggest that preservice programs and state and local district-level agencies follow a structured implementation process to ensure FIEP team members and facilitators benefit from the merits of tools. When implementing the facilitation tools and techniques with fidelity, the quality of delivery and outcomes increase.

Participants identified common sets of tools and techniques that were most helpful to their IEP facilitation. This information provides important information to preservice educators who could embed identified research-based tools and strategies into course case-study projects and simulated FIEP meetings. Licensed in-service educators and current FIEP facilitators could use the information from this study in any formal interaction including FIEP meetings, staff meetings, planning sessions, parent-teacher conferences, etc. to increase their comfort level and mastery.

Educators and facilitators should develop a practical and useful facilitated agenda that is strategically crafted to prepare team members on how and when specific topics will be addressed. When planning the agenda, consider how to use the agenda as a tool to address all federally required topics, encourage interactive discussions, and manage off-topic conversations. Sending the proposed agenda to all team members before the meeting to elicit any missed topics

or concerns. This increases team buy-in, transparency, and trust. It also ensures all team members come prepared to actively participate in the discussion.

Facilitators should develop meeting outcomes to achieve by the end of the meeting. When planning the outcomes, consider the purpose of the meeting (e.g., annual, initial, special, etc.) and the associated work for the IEP team to accomplish related to that meeting. Also, contemplate how to use the outcomes to focus the discussion, limit off-topic conversations, and pair with the parking lot tool. Any non-IEP-related topics that arise during the conversation are written on the parking lot chart to address at the end of the meeting. Be sure to think through how to propose the use of the parking lot to the team members so that they understand the intent and do not feel as though their concern is being ignored.

Facilitators should create meeting norms that set a positive, collaborative, and respectful meeting tone for the meeting and consider factors such as culture, relationships, dynamics between team members, levels of conflict, and common barriers (cell phones, clarity of information). When constructing the norms, use positive, concise, and clear wording and then, practice proposing the group norms, rather than imposing the norms, to achieve buy in. Subtle positive language invites coherence and sets an optimistic tone that team members are more likely to follow.

Facilitators should prepare group memory tools for visually charting IEP topic discussions and proposals (e.g., present levels, goals, accommodations, services, etc.). Consider gathering information from team members, including family members and students. For example, have all stakeholders provide the student's present levels of performance in short, bulleted strengths and challenges as it relates to their area of expertise. Then, pre-chart the

information to visually cue the discussion during the meeting rather than reading narratives from the paperwork or evaluation reports.

Limitations and Implications for Future Research

While many important insights were derived from the study some limitations must be addressed in future research. This was a relatively small study with only 11 participants who came from the midwestern or southwestern part of the United States and mostly suburban or rural school districts; only one participant indicated being in an urban district. All but two participants were white, and all participants were female; thus, influences of cultural and gender diversity may impact the data. In addition, all respondents who answered the recruitment email indicated only positive experiences in the training and during subsequent FIEP meetings. Finally, all participants were licensed professionals who had training and expertise in the field of special education.

From this study, findings strongly supported increased participation and understanding from all team members. However, it is important to note that this is solely from the perspective of educators. In a commitment to include and empower parents as active IEP team members, it is imperative to gather evidence of meeting procedures that promote their meaningful participation. As the FIEP is a relatively new practice, there are nominal but important studies examining IEP members' perceptions and levels of participation (Goldman & Mason, 2018; Mueller & Vick, 2019). Thus, the next critical step in ensuring the FIEP is an effective method for all parties is to continue this examination solely on the family/caretaker's experiences. There are two purposes of facilitation, as a standard practice for all meetings at the district level or as a mechanism for ADR. Therefore, separate studies for each type of meeting will provide different but important information.

To date, no specific research examining the effectiveness and perceptions of the FIEP meeting from diverse cultures and conditions was found. Decades of research have reported lower levels of participation for families who are CLD compared to European American families due to barriers such as a lack of staff knowledge and sensitivity to cultural diversity, traditions, and family dynamics, CLD families' feelings of intimidation, uneven power dynamics, differences in communication styles, and attitudes of disability, as well as systemic barriers found in traditional IEP meetings including the use of confusing terminology, complicated and unfamiliar processes, and inappropriate language accommodations (Harry, 2008; Jung, 2011; Lo, 2012; Rossetti et al., 2017; Tran et al., 2018). Therefore, future research about the effectiveness of FIEP meetings, specifically from the perspective of participants identifying with these characteristics, will help to identify and address ineffective or ethnocentric practices.

Because the FIEP is collaborative, provides a concrete framework, and encourages the sharing of information in a clear and practical manner, incorporating the student in an active role during the meeting with the intent of facilitating portions based on their strengths is the next necessary step in creating promising and inclusive FIEP meeting practices. Student-led FIEP meetings or student co-facilitations are beginning to emerge as more staff are trained in the processes. However, because the number of districts that have formally taken this next step is relatively small, conducting an observational case study will provide a rich understanding of the behaviors and strategies used during the student-led FIEP. As the practice expands, a comparative case study will provide researchers and practitioners with information on how to improve or change the process when the student is actively involved.

Conclusion

This study provides rich anecdotal information from participants who were trained in IEP facilitation meeting techniques. Because the IEP meeting is identified by federal legislation and research as a critical activity required to develop a student's individualized education program, educators are encouraged to engage in a process that values all team members (educators and families) as experts who promote trust, collaboration, and inclusive conversations while addressing all required component in the student's program. The FIEP meeting is an emerging practice that utilizes a trained facilitator to follow a meeting framework and guide the meeting process while eliciting interactive information, input, and proposals from all team members. The facilitator is also trained to maintain a productive tone and respect among team members as well as intervene when conflict arises. This study provides meaningful insight into effective tools, techniques, and strategies necessary for conducting a productive FIEP meeting. By using this process and tools, school professionals can move toward providing effective and inclusive IEP meetings that ensure all participants have an equal role in developing the student's unique program.

REFERENCES

About Us. (2015, October 14). Center for Appropriate Dispute Resolution in Special Education (CADRE). https://www.cadreworks.org/about-us

Alase, A. (2017). The interpretative phenomenological analysis (IPA): A guide to a good qualitative research approach. *International Journal of Education and Literacy Studies*, 5(2), 9-19.

Alba, L. A., Mercado Anazagasty, J., Ramirez, A., & Johnson, A. H. (2022). Parents' perspectives about special education needs during covid-19: Differences between Spanish and English-speaking parents. *Journal of Latinos and Education*, 0(0), 1–12. https://doi.org/10.1080/15348431.2022.2056184

Allen, J. A., Lehmann-Willenbrock, N., & Sands, S. J. (2016). Meetings as a positive boost? How and when meeting satisfaction impacts employee empowerment. *Journal of Business Research*, *69*(10), 4340–4347. https://doi.org/10.1016/j.jbusres.2016.04.011

Allen, S. J., Rosch, D. M., & Riggio, R. E. (2022). Advancing leadership education and development: Integrating adult learning theory. *Journal of Management Education*, *46*(2), 252–283. https://doi.org/10.1177/10525629211008645

Andrews, E. E., Forber-Pratt, A. J., Mona, L. R., Lund, E. M., Pilarski, C. R., & Balter, R. (2019). #SaytheWord: A disability culture commentary on the erasure of "disability." *Rehabilitation Psychology*, 64(2), 111–118. https://doi.org/10.1037/rep0000258their

Appleman, L. I. (2018). Deviancy, dependency, and disability: The forgotten history of eugenics

and mass incarceration. *Duke Law Journal*, 68(3), 417–478.

https://heinonline.org/HOL/P?h=hein.journals/duklr68&i=431

Barrio, B. L., Miller, D., Hsiao, Y.-J., Dunn, M., Petersen, S., Hollingshead, A., & Banks, S.

(2017). Designing culturally responsive and relevant individualized educational

programs. *Intervention in School and Clinic*, 53(2), 114–119.

https://doi.org/10.1177/1053451217693364

Barton, P. (2003). *Parsing the achievement gap: Baselines for tracking progress*. Policy

Information Report, Educational Testing Services.

https://www.ets.org/Media/Research/pdf/PICPARSING.pdf

Basham, J. D., Israel, M., & Maynard, K. (2010). An ecological model of stem education:

Operationalizing stem for all. *Journal of Special Education Technology*, 25(3), 9–19.

http://www.proquest.com/docview/813326914/abstract/6A99CDCFEBC84ABFPQ/1

Beck, S. J., & DeSutter, K. (2020). An examination of group facilitator challenges and problem-

solving techniques during IEP team meetings. *Teacher Education and Special Education*,

43(2), 127–143. https://doi.org/10.1177/0888406419839766

Bellinger, J. H., & Little, D. (2000). *Facilitated IEP meetings: Finally, a process that works*.

Paper presented at proceedings of American Council for Rural Special Education

Conference, North Bethesda, Maryland.

Bentz, J., & O'Brien, K. (2019). ART FOR CHANGE: Transformative learning and youth

empowerment in a changing climate. *Elementa: Science of the Anthropocene, 7*, 52.

https://doi.org/10.1525/elementa.390

Billingsley, B., & Bettini, E. (2019). Special education teacher attrition and retention: A review of the literature. *Review of Educational Research*, 89(5), 697–744. https://doi.org/10.3102/0034654319862495

Birt, L., Scott, S., Cavers, D., Campbell, C., & Walter, F. (2016). Member checking: A tool to enhance trustworthiness or merely a nod to validation? *Qualitative Health Research*, *26*. https://doi.org/10.1177/1049732316654870

Blackwell, W. H., & Blackwell, V. V. (2015). A longitudinal study of special education due process hearings in Massachusetts: Issues, representation, and student characteristics. *SAGE Open*, *5*(1), 2158244015577669. https://doi.org/10.1177/2158244015577669

Blue-Banning, M., Summers, J. A., Frankland, H. C., Nelson, L. L., & Beegle, G. (2004). Dimensions of family and professional partnerships: constructive guidelines for collaboration. *Exceptional Children* 70(2), 167–184. http://search.proquest.com/docview/201200091/abstract/5CAB0066DEEC45BFPQ/1

Bogart, K. R., & Dunn, D. S. (2019). Ableism special issue introduction. *Journal of Social Issues, 75*(3), 650–664. https://doi.org/10.1111/josi.12354

Brantlinger, E., Jimenez, R., Klinger, J., Pugach, M., & Richardson, V. (2005). Qualitative studies in special education. *Exceptional Children, 71*(2), 195-207.

Bricker, D. D., Felimban, H. S., Lin, F. Y., Stegenga, S. M., & Storie, S. O. (2022). A proposed framework for enhancing collaboration in early intervention/early childhood special education. *Topics in Early Childhood Special Education*, *41*(4), 240–252. https://doi.org/10.1177/0271121419890683

Brown v. Board of Education, 347 U.S. 483 (1954).

Buil, I., Catalán, S., & Martínez, E. (2019). Encouraging intrinsic motivation in management training: The use of business simulation games. *The International Journal of Management Education*, *17*(2), 162–171. https://doi.org/10.1016/j.ijme.2019.02.002

Candela, A. G. (2019). Exploring the function of member checking. *The Qualitative Report*, *24*(3), 619–628.

https://www.proquest.com/docview/2213787326/abstract/60105DD7CE3444CFPQ/1

Carver-Thomas, D., & Darling-Hammond, L. (2019). The trouble with teacher turnover: How teacher attrition affects students and schools. *Education Policy Analysis Archives*, *27*, 36. https://doi.org/10.14507/epaa.27.3699

Castillo-Montoya, M. (2016). Preparing for interview research: The interview protocol refinement framework. *The Qualitative Report*, *21*(5), 811–830. https://www.proquest.com/docview/1806967398/abstract/1F6C355A73C44976PQ/1

Cavendish, W., & Connor, D. (2018). Toward authentic IEPs and transition plans: Student, parent, and teacher perspectives. *Learning Disability Quarterly*, *41*(1), 32–43. https://doi.org/10.1177/0731948716684680

Center for Appropriate Dispute Resolution in Special Education. (2004). *Facilitated IEP meetings: An emerging practice*. Author. http://www.directionservice.org/cadre/facilitatediep.cfm

Center for Appropriate Dispute Resolution in Special Education. (2019a). *Considering IEP facilitation: A school administrators perspective*. https://www.cadreworks.org/sites/default/files/resources/CADRE-ConsideringFacilitation-Web%20FINAL%20Accessible.pdf

Center for Appropriate Dispute Resolution in Special Education. (2019b). *Idea dispute resolution data summary for: U.S. and outlying areas 2008-09 to 2017-18*. https://www.cadreworks.org/sites/default/files/resources/2017-18%20DR%20Data%20Summary%20-%20U.S.%20and%20Outlying%20Areas%20-%20Accessible%20FINAL.pdf

Chen, J. C. (2014). Teaching nontraditional adult students: Adult learning theories in practice. *Teaching in Higher Education*, *19*(4), 406–418. https://doi.org/10.1080/13562517.2013.860101

Cheng, T. L., & Hackworth, J. M. (2021). The "Cs" of mentoring: Using adult learning theory and the right mentors to position early-career investigators for success. *The Journal of Pediatrics, 238*, 6-8.e2. https://doi.org/10.1016/j.jpeds.2021.03.023

Childre, A., & Chambers, C. R. (2005). Family perceptions of student-centered planning and IEP meetings. *Education and Training in Developmental Disabilities*, *Vol. #*, 217-233.

Chuang, S. (2021). The applications of constructivist learning theory and social learning theory on adult continuous development. *Performance Improvement*, *60*(3), 6–14. https://doi.org/10.1002/pfi.21963

Chung, B. G., Ehrhart, K. H., Shore, L. M., Randel, A. E., Dean, M. A., & Kedharnath, U. (2020). Work Group Inclusion: Test of a Scale and Model. *Group & Organization Management*, *45*(1), 75–102. https://doi.org/10.1177/1059601119839858

Community Consolidated Sch. Dist. No. 180, 27 IDELR 1004, 1005-06.

Connelly, L. M. (2016). Trustworthiness in qualitative research. *Medsurg Nursing; Pitman*, *25*(6), 435–436. http://search.proquest.com/docview/1849700459/citation/A9B3C8E955084BA6PQ/1

Conrad, J. A. (2020). On intellectual and developmental disabilities in the United States: A

　　historical perspective. *Journal of Intellectual Disabilities*, *24*(1), 85–101.

　　https://doi.org/10.1177/1744629518767001

Cope-Kasten, C. (2013). Bidding (fair)well to due process: The need for a fairer final stage in

　　special education dispute resolution. *Journal of Law and Education, 42*(3), 501-539.

Cox, E. (2015). Coaching and adult learning: Theory and practice. *New Directions for Adult and

　　Continuing Education, 2015(*148), 27–38. https://doi.org/10.1002/ace.20149

Creswell, J. W., & Creswell, J. D. (2018). *Research design* (5th ed.). SAGE Publications.

Creswell, J., & Poth, C. (2018). *Qualitative inquiry and research design: Choosing among five

　　approaches* (4th ed.). SAGE Publications, Inc.

Crotty, M. (1998). *The foundations of social research: Meaning and perspectives in the research

　　process*. SAGE Publications, Inc.

Danforth, S., & Connor, D. J. (2020). Considering inclusive education through the independent

　　living movement: Lessons for improvement? *The Educational Forum*, 84(4), 325–339.

　　https://doi.org/10.1080/00131725.2020.1798705

Darling-Hammond, L., Hyler, M., & Gardner, M. (2017). *Effective teacher professional

　　development*. Learning Policy Institute. https://doi.org/10.54300/122.311

Dasgupta, C., Sanzenbacher, B., Siegel, J., Mcbeath, D., & Moher, T. (2017). Call the plumber:

　　Engaging students with authentic engineering design practices. *Science Scope*, *40*(5), 50–

　　59. http://www.jstor.org/stable/26389038

Deardorff, M. E., & Yeager, K. H. (2021). Mothers' perceptions of satisfaction, trust, and power

　　in the individualized education program process. *Inclusion*, *9*(4), 247–262.

　　http://doi.org/10.1352/2326-6988-9.4.247

Deggs, D. M., & Hernandez, F. (2018). Enhancing the value of qualitative field notes through purposeful reflection. *Qualitative Report*, *23*(10), 2552–2560. https://go.exlibris.link/ZYNXM6NH

DeJonckheere, M., & Vaughn, L. M. (2019). Semistructured interviewing in primary care research: A balance of relationship and rigour. *Family Medicine and Community Health*, *7*(2), e000057. https://doi.org/10.1136/fmch-2018-000057

DeMarrais, K. B., & Lapan, S. D. (2004). *Foundations for research: Methods of inquiry in education and the social sciences*. L. Erlbaum Associates.

Dix, D. L. (1843). Memorial: *To the legislature of Massachusetts [protesting against the confinement of insane persons and idiots in almshouses and prisons]*. Munroe & Francis.

Elbaum, B., Blatz, E. T., & Rodriguez, R. J. (2016). Parents' experiences as predictors of state accountability measures of schools' facilitation of parent involvement. *Remedial and Special Education*, *37*(1), 15–27. https://doi.org/10.1177/0741932515581494

Epstein, J. (2018). School, family, and community partnerships in teachers' professional work. *Journal of Education for Teaching, 44*(3), 397–406. https://doi.org/10.1080/02607476.2018.1465669

Epstein, J. L., & Sanders, M. G. (2006). Prospects for change: Preparing educators for school, family, and community partnerships. *Peabody Journal of Education*, *81*(2), 81-120.

Every Student Succeeds Act. (2015). Public Law 114-95.

Ferdman, B. M., Deane, B. R., Ferdman, B. M., & Deane, B. R. (2013). *Diversity at work: The practice of inclusion*. John Wiley & Sons, Incorporated. http://ebookcentral.proquest.com/lib/unco/detail.action?docID=1568418

Fish, W. W. (2008). The IEP meeting: Perceptions of parents of students who receive special

    education services. *Preventing School Failure: Alternative Education for Children and*

    Youth, *53*(1), 8–14. https://doi.org/10.3200/PSFL.53.1.8-14

Fisher, R., & Brown, S. (1989). *Getting together: Building relationships as we negotiate*.

    Penguin.

Fisher, R., & Ury, W. (1991). *Getting to yes: Negotiating agreement without giving* (2nd ed.).

    Penguin.

Fowler, S. A., Coleman, M. R. B., & Bogdan, W. K. (2019). The state of the special education

    profession survey report. *TEACHING Exceptional Children*, *52*(1), 8–29.

    https://doi.org/10.1177/0040059919875703

Francis, G. L., Blue-Banning, M., Haines, S. J., Turnbull, A. P., & Gross, J. M. (2016). Building

    "our school": Parental perspectives for building trusting family–professional partnerships.

    Preventing School Failure: Alternative Education for Children and Youth, *60*(4), 329–

    336. https://doi.org/10.1080/1045988X.2016.1164115

Francis, G. L., Gershwin, T., Turnbull, H. R., & Raines, A. (2020). Social role valorization of

    caregivers in school systems: The influence of terminology in federal education

    legislation. *Special Educator e-Journal*.

    https://www.naset.org/index.php?id=5733#c43555

Friend, M., Cook, L., Hurley-Chamberlain, D., & Shamberger, C. (2010). Co-Teaching: An

    illustration of the complexity of collaboration in special education. *Journal of*

    Educational and Psychological Consultation, *20*(1), 9–27.

    https://doi.org/10.1080/10474410903535380

Gergle, D., Kraut, R. E., & Fussell, S. R. (2013). Using visual information for grounding and awareness in collaborative tasks. *Human–Computer Interaction, 28*(1), 1-39.

Gershwin, T. (2020). Legal and research considerations regarding the importance of developing and nurturing trusting family-professional partnerships in special education consultation. *Journal of Educational and Psychological Consultation, 30*(4), 420–436. https://doi.org/10.1080/10474412.2020.1785884

Gilad, D., & Rimmerman, A. (2014). The mission and development processes of the disability movement in Israel and the United States: A comparison. *Journal of Disability Policy Studies, 24*(4), 227–237. https://doi.org/10.1177/1044207312463238

Gittell, J. H., & Douglass, A. (2012). Relational bureaucracy: Structuring reciprocal relationships into roles. *The Academy of Management Review, 37*(4), 709–733. http://www.jstor.org/stable/23416293

Glessner, M. M., & Johnson, S. A. (2020). The experiences and perceptions of practicing special education teachers during the covid-19 pandemic. *The Interactive Journal of Global Leadership and Learning, 1*(2), https://doi.org/10.55354/2692-3394.1013

Goldman, S. E., & Burke, M. M. (2017). The effectiveness of interventions to increase parent involvement in special education: A systematic literature review and meta-analysis. *Exceptionality, 25*(2), 97–115. https://doi.org/10.1080/09362835.2016.1196444

Goldman, S. E., & Mason, C. Q. (2018). Predictors of participant perceptions of facilitated individualized education program meeting success. *Journal of Disability Policy Studies, 29*(1), 43-53.

Graesser, A. C., Fiore, S. M., Greiff, S., Andrews-Todd, J., Foltz, P. W., & Hesse, F. W. (2018). Advancing the science of collaborative problem solving. *Psychological Science in the Public Interest*, *19*(2), 59–92. https://doi.org/10.1177/1529100618808244

Green, D., & Cassani, M. K. (2020). Scenarios, stakeholders, autonomy, and choice: Using role-play to facilitate transformational learning experiences. *Journal of College Science Teaching*, *49*(5), 42–45.

https://www.proquest.com/docview/2501937304/abstract/3581D8CAC7FF4931PQ/1

Groenewald, T. (2018). Reflection/commentary on a past article: A phenomenological research design illustrated. *International Journal of Qualitative Methods*,*17*(1), 160940691877466. doi:10.1177/1609406918774662

Haines, S. J., Francis, G. L., Mueller, T. G., Chiu, C.-Y., Burke, M. M., Kyzar, K., Shepherd, K. G., Holdren, N., Aldersey, H. M., & Turnbull, A. P. (2017). Reconceptualizing family-professional partnership for inclusive schools: A call to action. *Inclusion*, *5*(4), 234–247. https://doi.org/10.1352/2326-6988-5.4.234

Hancock, C. L., & Cheatham, G. A. (2021). Decision-making during early intervention home visits: From minimal to meaningful parent participation, *Journal of Research in Childhood Educatio*n, *35*(1), 68-90. https://doi.org/10.1080/02568543.2020.1782546

Harmon, S., Street, M., Bateman, D., & Yell, M. L. (2020). Developing present levels of academic achievement and functional performance statements for IEPs. *Teaching Exceptional Children, 52*(5), 320–332. https://doi.org/10.1177/0040059920914260

Harry, B. (2008). Collaboration with culturally and linguistically diverse families: ideal versus reality. *Exceptional Children*, *74*(3), 372–388.

http://www.proquest.com/docview/201230212/abstract/449AEAE4F2CA4C7CPQ/1

Henderson, A. T., & Mapp, K. L. (2002). *A new wave of evidence: The impact of school, family, and community connections on student achievement*. Southwest Educational Development Laboratory. https://sedl.org/pubs/catalog/items/fam33.html

Hester, O. R., Bridges, S. A., & Rollins, L. H. (2020). "Overworked and underappreciated": Special education teachers describe stress and attrition. Teacher Development, 24(3), 348–365. https://doi.org/10.1080/13664530.2020.1767189

Hoe, S. L., & Greulich-Smith, T. (2022). Using role play to develop an empathetic mindset in executive education. *Industrial and Commercial Training, 54*(1), 145–151. https://doi.org/10.1108/ICT-03-2021-0020

Individuals with Disabilities Education Act. (2004). Pub. L. No. 108-446, 20 U.S.C. §1400 et seq.

Individuals With Disabilities Education Act Regulations, 34 C.F.R. § 300.501(b)(1) (b)(3). (2009).

Individuals with Disabilities Education Act. (2020, November 9). *2019-20 DR Data Summary—National*. DR Data Summary - National. CADRE. https://www.cadreworks.org/resources/cadre-materials/2019-20-dr-data-summary-national

Initial Special Education Preparation Standards. (2012). https://exceptionalchildren.org/standards/initial-special-education-preparation-standards

Johnson, A. H., Connolly, J. J. G., Collier-Meek, M. A., Cornell, B. L., & Walker, W. V. (2020). Developing a measure to evaluate perceptions of team meetings in schools. *Journal of Educational and Psychological Consultation*, *30*(1), 1–28. https://doi.org/10.1080/10474412.2019.1629945

Jones, B. A., & Peterson-Ahmad, M. B. (2017). Preparing new special education teachers to facilitate collaboration in the individualized education program process through mini-conferencing. *International Journal of Special Education, 32*(4), 697–707.

Jung, A. W. (2011). Individualized education programs (IEPs) and barriers for parents from culturally and linguistically diverse backgrounds. *Multicultural Education*, *18*(3), 21–25. http://www.proquest.com/docview/926978273/abstract/F498AA9769943C4PQ/1

Karanxha, Z., & Zirkel, P. (2014). Trends in special education case law: Frequency and outcomes in court case decisions 1998-2012. *Journal of Special Education Leadership, 27*, 55-65.

Knowles, M. S., Holton, E. F., & Swanson, R. A. (2005). *The adult learner: The definitive classic in adult education and human resource development*. Taylor & Francis Group. http://ebookcentral.proquest.com/lib/unco/detail.action?docID=232125

Kreamer, L., & Rogelberg, S. (2020). Leadership and professional development: Evidence-based strategies to make team meetings more effective. *Journal of Hospital Medicine*, *15*(4), 236–236. https://doi.org/10.12788/jhm.3294

Kurth, J. A., McQueston, J. A., Ruppar, A. L., Toews, S. G., Johnston, R., & McCabe, K. M. (2019). A description of parent input in IEP development through analysis IEP documents. *Intellectual and Developmental Disabilities*, *57*(6), 485–498. http://.doi.org/unco.idm.oclc.org/10.1352/1934-9556-57.6.485

Kyzar, K. B., Mueller, T. G., Francis, G. L., & Haines, S. J. (2019). Special education teacher preparation for family–professional partnerships: Results from a national survey of teacher educators. *Teacher Education and Special Education*, *42*(4), 320–337. https://doi.org/10.1177/0888406419839123

Lake, J. F., & Billingsley, B. S. (2000). An analysis of factors that contribute to parent—school conflict in special education. *Remedial and Special Education*, *21*(4), 240-251.

Larios, R., & Zetlin, A. (2018). Bilingual and monolingual parents' counterstories of the Individualized Education Program (IEP) meeting. *Urban Education*, 0042085918804003. https://doi.org/10.1177/0042085918804003

Leach, D. J., Rogelberg, S. G., Warr, P. B., & Burnfield, J. L. (2009). Perceived meeting effectiveness: The role of design characteristics. *Journal of Business and Psychology*, *24*(1), 65–76. https://doi.org/10.1007/s10869-009-9092-6

LeBlanc, L. A., & Nosik, M. R. (2019). Planning and leading effective meetings. *Behavior Analysis in Practice*, *12*(3), 696–708. https://doi.org/10.1007/s40617-019-00330-z

Leiter, V. (2004). Parental activism, professional dominance, and early childhood disability. *Disability Studies Quarterly*, *24*(2), Article 2. https://doi.org/10.18061/dsq.v24i2.483

Lindsay, S., Duncanson, M., Niles-Campbell, N., McDougall, C., Diederichs, S., & Menna-Dack, D. (2018). Applying an ecological framework to understand transition pathways to postsecondary education for youth with physical disabilities. *Disability and Rehabilitation*, *40*(3), 277–286. https://doi.org/10.1080/09638288.2016.1250171

Little, D., & Little, J. H. (2018). Conflict prevention and resolution through IEP meeting facilitation [Participant manual]. In D. Little, J. H. Little, C. Velasquez, & R. O'Shea (Eds.), Key2Ed, Inc.

Little, D., Little, J., Velasquez C., & Keim R. (August, 2013). Making IEP meetings work: Using facilitators to bring the team together. *Southeast Education Network Magazine*.

Lo, L. (2012). Demystifying the IEP process for diverse parents of children with disabilities. *Teaching Exceptional Children*, *44*(3), 14–20. http://www.proquest.com/docview/914262071/abstract/690AA60B2AB843CFPQ/1

Lochmiller, C. R. (2019). *Complementary research methods for educational leadership and policy studies*. Palgrave Macmillan.

Lovelace, T. S., Robertson, R. E., & Tamayo, S. (2018). Experiences of African American mothers of sons with autism spectrum disorder: Lessons for improving service delivery. *Education and Training in Autism and Developmental Disabilities*, *53*(1), 3–16. http://www.jstor.org/stable/26420423

Markow, D., Macia, L., & Lee, H. (2013). *The Metlife survey of the American teacher: Challenges for school leadership*. Metropolitan Life Insurance Company.

Martin, J. E., Van Dycke, J. L., Christensen, W. R., Greene, B. A., Gardner, J. E., & Lovett, D. L. (2006). Increasing student participation in IEP meetings: Establishing the self-directed IEP as an evidenced-based practice. *Exceptional Children*, *72*(3), 299–316. https://doi.org/10.1177/001440290607200303

Mason, C. Q., & Goldman, S. E. (2017). Facilitated individualized education planning: The state of implementation and evaluation. *Journal of Disability Policy Studies*, *27*(4), 212-222.

McLeskey, J., Barringer, M., Billingsley, B., Brownell, M., Jackson, D., Kennedy, M., Lewis, T., Maheady, L., Rodriguez, J., Scheeler, M. C., Winn, J., & Ziegler, D. (2017, January). *High-leverage practices in special education*. Council for Exceptional Children & CEEDAR Center. https://ceedar.education.ufl.edu/wp-content/uploads/2017/07/CEC-HLP-Web.pdf

McMurtrey, K. (2016). The idea and the use of mediation and collaborative dispute resolution in

   due process disputes. *Journal of Dispute Resolution*, *2016*(1), p. #.13

   https://scholarship.law.missouri.edu/jdr/vol2016/iss1/12

Mead, J. F., & Paige, M. A. (2008). Parents as advocates: Examining the history and evolution of

   parents' rights to advocate for children with disabilities under the idea. *Journal of*

   Legislation, *34*(2), 123–167.

Mereoiu, M., Abercrombie, S., & Murray, M. (2016). One step closer: Connecting parents and

   teachers for improved student outcomes. *Cogent Education*, *3*(1)

   http://doi.org/unco.idm.oclc.org/10.1080/2331186X.2016.1243079

Merriam, S. B., & Tisdell, E. J. (2016). Qualitative research: A guide to design and

   implementation (4th ed.). Jossey Bass.

Michel, S. (1994). Dorthea Dix; Or, the voice of the maniac. *Discourse*, *17*(2), 48–66.

   http://www.jstor.org/stable/41389368

Mills v. Board of Education of District of Columbia, 348 F. Supp. 866 (D.D.C. 1972).

Molaro, A. (2019). Meetings: A framework to improve effectiveness and employee satisfaction.

   Library Leadership & Management, *33*(2), Article 2.

   https://doi.org/10.5860/llm.v33i2.7321

Morse, J. M. (2008). Confusing categories and themes. *Qualitative Health Research*, *18*(6), 727–

   728. https://doi.org/10.1177/1049732308314930

Mortari, L. (2015). Reflectivity in research practice: An overview of different perspectives.

   International Journal of Qualitative Methods, *14*(5), 1609406915618045.

Mthuli, S. A., Ruffin, F., & Singh, N. (2021). "Define, explain, justify, apply" (DEJA): An

    analytic tool for guiding qualitative research sample size. *International Journal of Social*

    Research Methodology, *0*(0), 1–13. https://doi.org/10.1080/13645579.2021.1941646

Mueller, T. G. (2009). IEP facilitation: A promising approach to resolving conflicts between

    parents of children with disabilities and school districts. *Teaching Exceptional Children,*

    41(3), 60-67.

Mueller, T. G. (2015). Litigation and special education: The past, present, and future direction

    for resolving conflicts between parents and school districts. *The Journal of Disability*

    Policy Studies. https://doi.org/ 10.1177/1044207314533382

Mueller, T. G. (2017). Promoting collaborative partnerships with families. In J. M. Kauffman &

    D. P. Hallahan (Eds.), *Handbook of Special Education* (2nd ed.) (pp. 773-789). Routledge

Mueller, T. G., & Buckley, P. C. (2014). The odd man out: How fathers navigate the special

    education system. *Remedial and Special Education*, *35*(1), 40–49.

    https://doi.org/10.1177/0741932513513176

Mueller, T. G., & Carranza, F. (2011). An examination of special education due process

    hearings. *Journal of Disability Policy Studies*, *22*(3), 131–139.

Mueller, T. G., Massafra, A., Robinson, J., & Peterson, L. (2019). Simulated individualized

    education program meetings: Valuable pedagogy within a preservice special educator

    program. *Teacher Education and Special Education*, *42*(3), 209–226.

    https://doi.org/10.1177/0888406418788920

Mueller, T. G., Singer, G. H. S., & Draper, L. M. (2008). Reducing parental dissatisfaction with

    special education in two school districts: Implementing conflict prevention and

alternative dispute resolution, *Journal of Educational and Psychological Consultation*, *18*(3), 191-233. https://doi.org/10.1080/10474410701864339

Mueller, T. G., & Vick, A. M. (2019). An investigation of facilitated individualized education program meeting practice: Promising procedures that foster family–professional collaboration. *Teacher Education and Special Education*, *42*(1), 67–81. https://doi.org/10.1177/0888406417739677

Mueller, T. G., & Wagner, J. (2017). *Evaluation results for key2ed facilitated IEP training: A quantitative and qualitative investigation of training participants' experiences*. Unpublished manuscript.

Murray, M., Curran, E., & Zellers, D. (2008). Building parent/professional partnerships: An innovative approach for teacher education. *The Teacher Educator, 43*(2), 87–108. https://doi.org/10.1080/08878730701838819

Nathan, M. J., & Sawyer, R. K. (2014). *Cambridge handbook of the learning sciences*. Cambridge University Press.

Neubauer, B. E., Witkop, C. T., & Varpio, L. (2019). How phenomenology can help us learn from the experiences of others. *Perspectives on Medical Education, 8*(2), 90–97. https://doi.org/10.1007/s40037-019-0509-2

Office of Special Education Programs. (2016). *Indicator 8: Parent involvement*. Center for Parent Information and Resources

Office of Special Education Programs. (2017). *Indicator 8: Parent involvement*. Center for Parent Information and Resources

Office of Special Education Programs. (2018). *Indicator 8: Parent involvement*. Center for Parent Information and Resources

Oliveria, M., Bitencourt, C. C., dos Santos, A. C. M. Z., & Teixeira, E. K. (2015). Thematic

content analysis: Is there a difference between the support provided by the maxqda® and

nvivo® software packages? *Revista de Administração Da UFSM*, *9*(1), 72–82.

https://doi.org/10.5902/1983465911213

Oswald, D. P., Zaidi, H. B., Cheatham, D. S., & Diggs Brody, K. G. (2018). Correlates of parent

involvement in students' learning: Examination of a national data set. *Journal of Child*

and Family Studies, *27*(1), 316–323. http://dx.doi.org.unco.idm.oclc.org/10.1007/s10826-

017-0876-4

Palinkas, L. A., Horwitz, S. M., Green, C. A., Wisdom, J. P., Duan, N., & Hoagwood, K. (2015).

Purposeful sampling for qualitative data collection and analysis in mixed method

implementation research. *Administration and Policy in Mental Health*, *42*(5), 533–544.

https://doi.org/10.1007/s10488-013-0528-y

Patton, M. Q. (2015). *Qualitative research and evaluation methods* (4th ed.). SAGE

Publications, Inc.

Paul, S., Haseman, W. D., & Ramamurthy, K. (2004). Collective memory support and cognitive-

conflict group decision-making: An experimental investigation. *Decision Support*

Systems, *36*(3), 261-281. doi:10.1016/s0167-9236(02)00144-6

Pennsylvania Association for Retarded Children v. Commonwealth of Pennsylvania, 343 F.

Supp. 279, 307 (E.D. Pa 1972).

Perlow, L. A., Hadley, C. N., & Eun, E. (2017). Stop the meeting madness: How to free up time

for meaningful work. *Harvard Business Review*, *95*(4), 62–69.

https://unco.idm.oclc.org/login?url=https://search.ebscohost.com/login.aspx?direct=true

&db=buh&AN=123738551&site=ehost-live

Pezalla, A. E., Pettigrew, J., & Miller-Day, M. (2012). Researching the researcher-as-instrument: An exercise in interviewer self-reflexivity. *Qualitative Research : QR*, *12*(2), 165–185. https://doi.org/10.1177/1487941111422107

Phillippi, J., & Lauderdale, J. (2018). A guide to field notes for qualitative research: Context and conversation. *Qualitative Health Research*, *28*(3), 381–388. https://doi.org/10.1177/1049732317697102

Purwati, D., Mardhiah, A., Nurhasanah, E., & Ramli, R. (2022). The six characteristics of andragogy and future research directions in efl: A literature review. *Elsya : Journal of English Language Studies*, *4*(1), Article 1. https://doi.org/10.31849/elsya.v4i1.7473

Remler, D. K., & Van Ryzin, G. G. (2011). *Research methods in practice: Strategies for description and causation*. Sage Publications, Inc.

Riccomini, P. J., Morano, S., & Hughes, C. A. (2017). Big ideas in special education: Specially designed instruction, high-leverage practices, explicit instruction, and intensive instruction. *TEACHING Exceptional Children*, *50*(1), 20–27. https://doi.org/10.1177/0040059917724412

Rodríguez Aboytes, J. G., & Barth, M. (2020). Transformative learning in the field of sustainability: A systematic literature review (1999-2019). *International Journal of Sustainability in Higher Education*, *21*(5), 993–1013. https://doi.org/10.1108/IJSHE-05-2019-0168

Rodriguez, J. A., & Murawski, W. W. (2020). Special education law and policy: From foundation to application. Plural Publishing. https://books.google.com/books?hl=en&lr=&id=D9EMEAAAQBAJ&oi=fnd&pg=PA73

&dq=ESEA+to+EAHCA&ots=FyFQeTV98Q&sig=Q907bNnqXgrNGnLCucWbcOcSn3
A#v=onepage&q=ESEA%20to%20EAHCA&f=false

Rossetti, Z., & Burke, M. M. (2019). Reaching out to culturally and linguistically diverse
families: Strategies and challenges reported by parent training and information center
staff. *Exceptionality*, *27*(3), 215–231. https://doi.org/10.1080/09362835.2018.1433042

Rossetti, Z., Burke, M. M., Hughes, O., Schraml-Block, K., Rivera, J. I., Rios, K., Aleman
Tovar, J., & Lee, J. D. (2021). Parent perceptions of the advocacy expectation in special
education. *Exceptional Children*, Vol. #, p. #.
https://doi.org/unco.idm.oclc.org/10.1177/0014402921994095

Rossetti, Z., Burke, M. M., Rios, K., Rivera, J. I., Schraml-Block, K., Hughes, O., Lee, J. D., &
Aleman-Tovar, J. (2020). Parent leadership and civic engagement: Suggestions for the
next individuals with disabilities education act reauthorization. *Journal of Disability
Policy Studies*, *31*(2), 99–111. https://doi.org/10.1177/1044207319901260

Rossetti, Z., Sauer, J. S., Bui, O., & Ou, S. (2017). Developing collaborative partnerships with
culturally and linguistically diverse families during the IEP process. *Teaching
Exceptional Children*, *49*(5), 328–338.
http://dx.doi.org/unco.idm.oclc.org/10.1177/0040059916680103

Ruppar, A. L., & Gaffney, J. S. (2011). Individualized education program team decisions: A
preliminary study of conversations, negotiations, and power. *Research and Practice for
Persons with Severe Disabilities*, *36*(1-2), 11-22.

Saldaña, J. (2013). *The coding manual for qualitative researchers* (2nd ed). SAGE.

Scanlon, D., Saenz, L., & Kelly, M. P. (2018). The effectiveness of alternative IEP dispute resolution practices. *Learning Disability Quarterly, 41*(2), 68–78. https://doi.org/10.1177/0731948717698827

Schlechty, P. C. (1997). *Inventing better schools: An action plan for educational reform*. Jossey-Bass.

Senge, P. M., Senge, P. M., Kleiner, A., & Roberts, C. (1994). *The fifth discipline fieldbook: Strategies and tools for building a learning organization*. Currency.

Shapiro, J. (1994). *No pity: People with disabilities forging a new civil rights movement*. Random House Inc.

Simon, G. (2018). Hardly be said to offer an education at all: Endrew and its impact of special education mediation notes. *Journal of Dispute Resolution, 2018*(2), [i]-146. https://heinonline.org/HOL/P?h=hein.journals/jdisres2018&i=485

Sims, S., & Fletcher-Wood, H. (2021). Identifying the characteristics of effective teacher professional development: A critical review. *School Effectiveness and School Improvement, 32*(1), 47–63. https://doi.org/10.1080/09243453.2020.1772841

Spaulding, L. S., & Pratt, S. M. (2015). A review and analysis of the history of special education and disability advocacy in the United States. *American Educational History Journal, 42*(1/2), 91–109. http://www.proquest.com/docview/1716404913/abstract/19EF19043217466EPQ/1

Steed, E. A., Phan, N., Leech, N., & Charlifue-Smith, R. (2021). Remote delivery of services for young children with disabilities during the early stages of the covid-19 pandemic in the United States. *Journal of Early Intervention*, 10538151211037672. https://doi.org/10.1177/10538151211037673

Tran, L. M., Patton, J. R., & Brohammer, M. (2018). Preparing educators for developing culturally and linguistically responsive IEPs. *Teacher Education and Special Education*, *41*(3), 229–242. https://doi.org/10.1177/0888406418772079

Turnbull, H. R., Shogren, K. A., & Turnbull, A. P. (2011). Evolution of the parent movement: Past, present and future. In J. M. Kauffman & D. P. Hallahan (Eds.), *Handbook of special education* (pp. 639–653). Routledge.

Turnbull, R., Turnbull, A., & Cooper, D. (2017). The Supreme Court, Endrew, and the appropriate education of students with disabilities. *Exceptional Children, 84*(2), 124-140. https://doi.org/10.1177/0014402917734150

Turnbull, A., Turnbull, H. R., Erwin, E. J., Soodak, L. C., & Shogren, K. A. (2015). *Families, professionals, and exceptionality: Positive outcomes through partnerships and trust*. Pearson.

Turnbull, A., Turnbull, R., Francis, G. L., Burke, M., Kyzar, K., Haines, S. J., Gershwin, T., Shepherd, K. G., Holdren, N., Singer, G. (2022). *Families and professionals: Trusting partnerships in general and special education* (8th ed.). Pearson.

U.S. Commission on Civil Rights. (2002, April 12). *Briefing on the reauthorization of Individuals with Disabilities Education Act (IDEA)*. https://www.usccr.gov/files/pubs/idea/trans.htm

U.S. Department of Education. (2019, August 30). *Guide to the Individualized Education Program*. ([Guides; Indexes]. https://www2.ed.gov/parents/needs/speced/iepguide/index.html

U.S. Senate Report. (1985). No. 110-773. https://www.govinfo.gov/content/pkg/CHRG-110shrg39388/html/CHRG-110shrg39388.htm

U.S. Senate Report. (2003). No 108-185. https://www.govinfo.gov/content/pkg/CRPT-108srpt185/html/CRPT-108srpt185.htm

Valle, J. W. (2011). Down the rabbit hole: A commentary about research on parents and special education. *Learning Disabilities Quarterly, 34*(3), 183–190. https://doi.org/10.1177/0731948711417555

Valle, J. W. (2018). Across the conference table: Private and public mothering of children with learning disabilities. *Learning Disability Quarterly*, *41*(1), 7–18. http://www.jstor.org/stable/26742884

van Rijnsoever, F. J. (2017). (I can't get no) saturation: A simulation and guidelines for sample sizes in qualitative research. *PLOS ONE*, 12(7), e0181689. https://doi.org/10.1371/journal.pone.0181689

Weber-Mayrer, M. M., Piasta, S. B., & Yeager Pelatti, C. (2015). State-sponsored professional development for early childhood educators: Who participates and associated implications for future offerings. *Journal of Early Childhood Teacher Education, 36*(1), 44–60. https://doi.org/10.1080/10901027.2014.996927

Weiss, M. P., Pellegrino, A., & Brigham, F. J. (2017). Practicing collaboration in teacher preparation: Effects of learning by doing together. *Teacher Education and Special Education*, *40*(1), 65–76. https://doi.org/10.1177/0888406416655457

Wiley, N. (2011). A Mead–Cooley merger. *The American Sociologist*, *42*(2–3), 168–186. https://doi.org/10.1007/s12108-011-9124-3

Wolfensberger, W. (2000). A brief overview of social role valorization. *Mental Retardation*, *38*(2), 105–123. https://doi.org/10.1352/0047-6765(2000)038<0105:ABOOSR>2.0.CO;2

Wolfensberger, W. (2011). Social role valorization and, or versus," 'empowerment.'" *Intellectual and Developmental Disabilities*, *49*(6), 469–476.

http://www.proquest.com/docview/929150617/abstract/872462846304D33PQ/1

Yell, M. L. (2015). *The law and special education* (4th ed.). Pearson.

Yell, M. L., Prince, A. M. T., & Katsiyannis, A. (2022). M. C. v. Antelope Valley Union High School District (2017): Implications for special educators. *Intervention in School and Clinic*, *57*(4), 274–282. https://doi.org/10.1177/10534512211024949

Zeitlin, V. M., & Curcic, S. (2014). Parental voices on individualized education programs: 'Oh, IEP meeting tomorrow? Rum tonight!' *Disability and Society*, *29*(3), 373–387. https://doi.org/10.1080/09687599.2013.776493

Zhao, S. (2015). Reconceptualizing the self-phenomenon: Toward an emic conception of the self. *Symbolic Interaction*, *38*(2), 235–260. https://doi.org/10.1002/symb.151

Ziegler, M. E. (2020). Disabling language: Why legal terminology should comport with a social model of disability. *Boston College*. *Law School*. *Boston College Law Review*, *61*(3), 1182–1221.

http://www.proquest.com/docview/2396316758/abstract/9C6E3EFE40CE4A82PQ/1

APPENDIX A

INSTITUTIONAL REVIEW BOARD APPROVAL

UNIVERSITY OF
NORTHERN COLORADO

Institutional Review Board

Date:	06/09/2022
Principal Investigator:	Robin O'Shea
Committee Action:	**IRB EXEMPT DETERMINATION – New Protocol**
Action Date:	06/09/2022
Protocol Number:	2205039193
Protocol Title:	Use Them or Lose Them: Inservice Teacher Perceptions of The Usability and Sustainability of Facilitated IEP Meeting Training and Learned Techniques
Expiration Date:	

The University of Northern Colorado Institutional Review Board has reviewed your protocol and determined your project to be exempt under 45 CFR 46.104(d)(702) for research involving

Category 2 (2018): EDUCATIONAL TESTS, SURVEYS, INTERVIEWS, OR OBSERVATIONS OF PUBLIC BEHAVIOR. Research that only includes interactions involving educational tests (cognitive, diagnostic, aptitude, achievement), survey procedures, interview procedures, or observation of public behavior (including visual or auditory recording) if at least one of the following criteria is met: (i) The information obtained is recorded by the investigator in such a manner that the identity of the human subjects cannot readily be ascertained, directly or through identifiers linked to the subjects; (ii) Any disclosure of the human subjects' responses outside the research would not reasonably place the subjects at risk of criminal or civil liability or be damaging to the subjects' financial standing, employability, educational advancement, or reputation; or (iii) The information obtained is recorded by the investigator in such a manner that the identity of the human subjects can readily be ascertained, directly or through identifiers linked to the subjects, and an IRB conducts a limited IRB review to make the determination required by 45 CFR 46.111(a)(7).

You may begin conducting your research as outlined in your protocol. Your study does not require further review from the IRB, unless changes need to be made to your approved protocol.

As the Principal Investigator (PI), you are still responsible for contacting the UNC IRB office if and when:

Carter Hall 2008 | Campus Box 143 | Greeley, CO 80639 | Office 970-351-1910

UNIVERSITY OF
NORTHERN COLORADO

Institutional Review Board

- You wish to deviate from the described protocol and would like to formally submit a modification request. Prior IRB approval must be obtained before any changes can be implemented (except to eliminate an immediate hazard to research participants).

- You make changes to the research personnel working on this study (add or drop research staff on this protocol).

- At the end of the study or before you leave The University of Northern Colorado and are no longer a student or employee, to request your protocol be closed. *You cannot continue to reference UNC on any documents (including the informed consent form) or conduct the study under the auspices of UNC if you are no longer a student/employee of this university.

- You have received or have been made aware of any complaints, problems, or adverse events that are related or possibly related to participation in the research.

If you have any questions, please contact the Research Compliance Manager, Nicole Morse, at 970-351-1910 or via e-mail at nicole.morse@unco.edu. Additional information concerning the requirements for the protection of human subjects may be found at the Office of Human Research Protection website - http://hhs.gov/ohrp/ and https://www.unco.edu/research/research-integrity-and-compliance/institutional-review-board/.

Sincerely,

Nicole Morse
Research Compliance Manager

University of Northern Colorado: FWA00000784

APPENDIX B

RECRUITMENT EMAIL

Hello Colleagues!
I hope you are having a great summer break and have been able to rest a bit to recharge
for the upcoming year. I am emailing you today to ask if you would help me with my
dissertation study by agreeing to participate in a brief interview.

You have been selected to participate because you completed a facilitated IEP training and
have potentially implemented some of the tools and techniques learned from the training.
In my study, I hope to hear your impressions of the training as well as your experiences
facilitating or participating in meetings using the techniques learned in the training. If you
are interested in assisting me, please continue to read through the rest of this email and
complete the 1-minute survey at the bottom. The survey will ensure you meet the
demographics for the study.

RECRUITMENT LETTER FOR HUMAN PARTICIPANTS IN RESEARCH

Title of Research Study: Use Them or Lose Them: Inservice Teacher Perceptions of the
Usability and Sustainability of Facilitated IEP Meeting Training and Learned Techniques

Researchers The named researcher is a doctoral student in the UNC School of Special
Education.
Robin O'Shea:
(480) 209-3144; robin.oshea@unco.edu

Research
Advisor: Tracy Gershwin, Ph.D., University of Northern Colorado: tracy.gershwin@unco.edu

Why Do I Want to Talk with You?
In the past one to three years, you participated in FIEP training and have conducted facilitated
IEP meetings using techniques learned at this training. With your permission, I would like to
interview you via telephone or zoom for approximately 30 minutes. The interview will consist of
questions related to your impressions of the training as well as your experiences conducting FIEP
meetings using the techniques learned in the training.

How Can this Study Help?
This study is an evaluation of the outcomes of the FIEP training and facilitation techniques. It
will benefit your district, educator practice, and the field of special education at large, by
investigating and learning about a potential strategy (FIEP meetings) that can be used to build
and improve strong relationships among team members while remaining focused on the student.

Will This Interview Be Confidential?

Yes, your answers will be kept confidential. The interview will be recorded for the purpose of allowing me to correctly report the information. However, all data will be stored by a locked password computer program accessible by the researcher.

What Happens After the Study?
After the study is completed, I will write the results in the form of a research dissertation study and publication. Any identifiable information will be changed to protect anonymity.

I'm Interested, What Should I Do Next?
Please click on the link below to answer a 1-minute survey that will ensure you fit the criteria to participate in the study. After that, if you match the criteria, I will contact you to set up the interview.

https://unco.co1.qualtrics.com/jfe/form/SV_3wJrbCUHBUFeS1M

Sincerely,

Robin

Robin O'Shea
University of Northern Colorado
Special Education Doctoral Student
robin.oshea@unco.edu
480-209-3144

APPENDIX C

FOLLOW-UP RECRUITMENT EMAIL

Follow-Up Recruitment Email

Dear Colleague,

Thank you for agreeing to participate in my doctoral project.

The interview will consist of several open-ended questions related to your experiences gained from attending the FIEP CPR training and implementing the tools and techniques during meetings, after the training.

Please provide me with 2-3 days and times over the next two weeks that you will be available. The interview may take up to 30 minutes, but it is not likely. Let me know what fits into your schedule.

The interview will be conducted on the telephone or via a teleconferencing platform. Once you provide me with a date and time, I will send you the link.

Thank you again for your valuable time and input. I am looking forward to hearing from you.

With Appreciation,

APPENDIX D

**INFORMED CONSENT DOCUMENT FOR
PARTICIPATION IN RESEARCH,
INFORMED CONSENT SURVEY
QUESTIONS, DEMOGRAPHIC
SURVEY QUESTIONS**

Informed Consent Document for Participation in Research

Title of Research Study: USE THEM OR LOSE THEM: INSERVICE TEACHER PERCEPTIONS OF THE USABILITY AND SUSTAINABILITY OF FACILITATED IEP MEETING TRAINING AND LEARNED TECHNIQUES

Researcher(s): Robin O'Shea, School of Special Education
          Phone Number: (480) 209-3144; Email robin.oshea@unco.edu

Research Advisor: Dr. Tracy Gershwin, School of Special Education
          Phone Number: (970) 351-1664; Email: Tracy.Gershwin@unco.edu

Purpose: The purpose of this study is to explore the experiences of educators who have been trained in IEP facilitation meeting techniques to assess the value of the instructional training. Additionally, this study will assess the outcomes of the participants.

Participation:
Through participating in this one-on-one interview, you will be invited to share your personal experiences gained from attending the training and facilitating meetings. For example, I will ask you to describe your experiences and perceptions of the training as well as providing examples or descriptions of how the experiences and tools learned in the training inform or shape the outcomes of the IEP meetings?

I anticipate that the interview will last approximately 30 minutes. I will record the audio from the interview so that I can transcribe the interview for analysis.

Your experiences, along with those of the other participants in this study, will be transcribed and analyzed to identify themes describing changes in the IEP meeting experience. After the interview, I will send you a link to a survey with a summary of themes from the data asking you to rate your level of agreement in the theme. You may add any additional comments you would like to expand or support the themes. Additionally, there will be two short prompts requesting your final thoughts related to your perception of facilitation and facilitated IEP techniques.

Confidentiality:
To make sure that the information you provide during the interviews remains confidential; I will assign you a pseudonym. Only the research team will know your real name. I will also assign pseudonyms to any other people or locations your mention during your interview.

Risks: The risks of participating in this study are no greater than those encountered by participants in conversations about IEP meetings as a typical part of their everyday jobs or life during non-apocalyptic times. Discomfort may arise related to the discussion of sensitive topics dealing with IEP meeting experiences specific to the team member's role. However, those experiences are not expected to be more uncomfortable than what may arise during a typical conversation.

Participants are at minimal risk for physical, psychological, social, and/or legal issues from participation in the proposed study. Any physical risk of being exposed to COVID-19 will be mitigated by conducting interviews via Zoom or phone. To protect you against any potential privacy risks, the names of participants will be kept confidential. All personal identifiers will be removed from the data and data will be stored in a folder accessible only to the research team. No deception methods will be utilized.

Benefits: This study is an exploration of your perception about the activities and outcomes of the Facilitated IEP training and will benefit your district, educator practice, and the field of special education at large by investigating and learning about a potential strategy (FIEP meetings) that can be used to build and improve strong relationships among team members while remaining focused on the student.

Costs: The cost of participating in this study is the time invested to participate in the interview. No monetary compensation will be provided to you for participating in this study.

Questions: If you have any questions about the study, you may contact me the primary researcher by phone or email. You may also contact my research advisor, Dr. Tracy Gershwin, by phone or email.

Participation is voluntary. You may decide not to participate in this study and if you begin participation, you may still decide to stop and withdraw at any time. Your decision will be respected and will not result in loss of benefits to which you are otherwise entitled. Having read the above and having had an opportunity to ask any questions, please sign below if you would like to participate in this research. A copy of this form will be given to you to retain for future reference. If you have any concerns about your selection or treatment as a research participant, please contact Nicole Morse, Office of Research, Kepner Hall, University of Northern Colorado Greeley, CO 80639; 970-351-1910.

Please take all the time you need to read through this document and decide whether you would like to participate in this research study.

If you decide to participate, your completion of the research procedures indicates your consent. Please keep this form for your records.

Informed Consent Survey Questions

1. Are you a licensed special education provider (e.g., special education teacher, related

   service provider, school psychologist, site or district-level administrator)?

2. Have you attended the IEP facilitation training described in the informational letter from

   a minimum of one and maximum of three years ago?

3. Have you facilitated a minimum of two meetings using some or all the tools and

   techniques taught in the IEP facilitation training in the past six months?

4. If you qualify to participate, please provide an email address for further communication.

You have answered "yes" to all qualifying criteria and selected the informed consent to

participate in the study. Therefore, I will send you an email to schedule the Zoom interview.

The consent form will be for your own record. By participating in the interview, you will

give us verbal permission for your participation.

Thank You,

Robin O'Shea
Doctoral Student
University of Northern Colorado
Robin.oshea@unco.edu

Demographic Survey Questions

All Participants:

1.   How long have you been involved in IEP meetings?
2.   How many IEP meetings (or other meetings) have you conducted or utilized tools and techniques gained in the training since attending the facilitated IEP training? Please
       give your best estimate.

1.   Job title: _____
2.   Number of years in education: _____
3.   Number of years in current position: _____
4.   Age: _____
5.   Highest level of education: _____

Race:

__ American Indian or Alaska Native

__ Asian

__ Black or African American

__ Native Hawaiian or other Pacific
Islander

__ White

__ Other: _____

Ethnicity:

*Are you of Hispanic, Latino or Spanish
Origin?*

__ **No**, not of Hispanic,
Latino or Spanish origin

__ Yes, Mexican, Mexican American or
Chicano

__ Yes, Puerto Rican

__ Yes, Cuban

__ Yes, another Hispanic, Latino or
Spanish Origin: _____

APPENDIX E

EMAIL TO SCHEDULE INTERVIEW

Email to Schedule Interview

Hello (enter name here),

Thank you for your interest in participating in my doctoral project. Given your responses to the qualifying questionnaire, I would like to proceed with the interview process.

The interview will consist of several open-ended questions related to your experiences gained from attending the FIEP CPR training and implementing the tools and techniques during meetings after the training.

Please provide me with 2-3 days and times over the next two weeks that you will be available. The interview may take up to 45 minutes, but it is not likely. Let me know what fits into your schedule.

The interview will be conducted via zoom **audio**. Once you provide me with a date and time, I will send you the link.

Thank you again for your valuable time and input. I am looking forward to hearing from you.

With Appreciation,

Robin

Robin O'Shea
University of Northern Colorado
Special Education Doctoral Student
robin.oshea@unco.edu

APPENDIX F

INTERVIEW PROTOCOL

Interview Protocol

Title of Research Study: Use Them or Lose Them: Inservice Teacher Perceptions of the Usability and Sustainability of Facilitated IEP Meeting Training and Learned Techniques

Interviewer: Good(morning/afternoon). My name is Robin O'Shea, and I am a doctoral student in the School of Special Education at the University of Northern Colorado. I am investigating the experiences and perceptions of educators who attended IEP facilitation training and have implemented facilitation tools and techniques learned from the training. This study will assess the value of the instructional training activities and the usability and sustainability of the tools and techniques learned. Thank you for agreeing to be interviewed for my study.

This interview involves two parts. In the first part I will ask you about your perceptions and experiences with the facilitation training activities as well as the value of the instructional training activities and the usability and sustainability of the tools and techniques learned. The purpose of these questions is to understand your experiences as a school staff member who conducts meetings. There are no right or wrong answers. I would like you to feel comfortable with saying what you really think and how you really feel. Your responses will be confidential and no identifying information will be collected. We will use pseudonyms to ensure the confidentiality of any individuals named during the interview.

The second part of the interview is a short series of questions to help us collect some basic demographic information. The interview should last about 45 minutes. (*Note: Researcher will supply the consent form to participants in advance to allow for adequate review time. Allow the participant time to review the form if needed*). This consent form provides details about the purpose of the study, the risks and benefits of participation, and other important information. Do you have any questions about the consent form? *(Respond to any participant questions)*. Signing the form indicates that you consent to participate in this study. Are you ready to proceed with signing the consent form? *(Ensure that the participant initials the first page and signs/dates the second page before returning the form. Begin audio recording once the consent form has been signed)*.

APPENDIX G

SEMI-STRUCTURED INTERVIEW QUESTIONS

Semi-Structured Interview Questions

Q 1: **What are the experiences of licensed educators who participated the FIEP CPR training?**

You attended the FIEP CPR training can you tell me what your overall impression was of the training itself?

Where there any particular aspects of the training that stood out to you?

What aspects of the training seemed less helpful?

Where there any particular tools and techniques you learned that you deem valuable?

- What activities during the training aided in developing those skills?

After you received the training, how would you describe your experience going into subsequent IEP meetings?

- What strategies did you find yourself using from the training?
- Anything you struggled with?

Q 2: **How does the experience of the training inform or shape the participants outcomes of the IEP meetings?**

Tell me about what a typical IEP team meeting looked like prior to the training. Walk me through the steps?

After you received the training, how would you describe your experience going into subsequent IEP meetings?

Describe any ways you've applied what you learned in the training to working with families in general.

- In IEP meetings?
- Other?