

The Collaborative IEP Process: From Assessment to Service Delivery

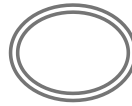
Session B

Best Practices in School-Based Services

January 21, 2026



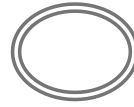
Today's Presenter



Carlynn Higbie, OTR
Professional Development

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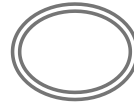
Welcome!



Please sign in using this QR Code:



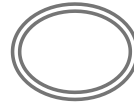
CDE Disclaimer



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Districts and Administrative Units are responsible for making educational decisions in accordance with all applicable federal and state laws and regulations. The CDE encourages stakeholders to consult with legal counsel and collaborate with trained professionals when applying the information shared in these sessions to local practices and procedures.

The Collaborative IEP Process Session C

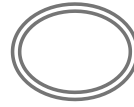


Session C: Designing Supports for Student Access, Engagement, and Progress

March 19, 2026

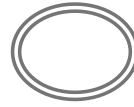
- Collaborative process for IEP goal development - shifting away from disciplined specific IEP goals.
- Integrated therapy services and embedded interventions to support student outcomes.
- Implementing a workload model.

Learning Objectives for Today

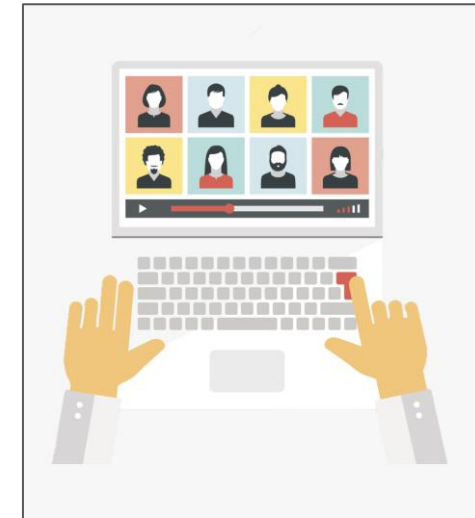


- 1. Understand:** Regulatory issues that affect school-based practice.
- 2. Describe:** The role of OT and PT in MTSS
- 3. Identify:** Best practices for comprehensive, participation-based assessment and interventions that lead to improved student outcomes.

Expectations for Today

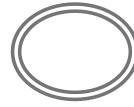


- Ask questions - write in chat.
- Listen fully - with your ears, eyes and heart.
- Integrate new information - For additional reading or opportunities for application in your practice.
- Notice moments of discomfort and stay curious.

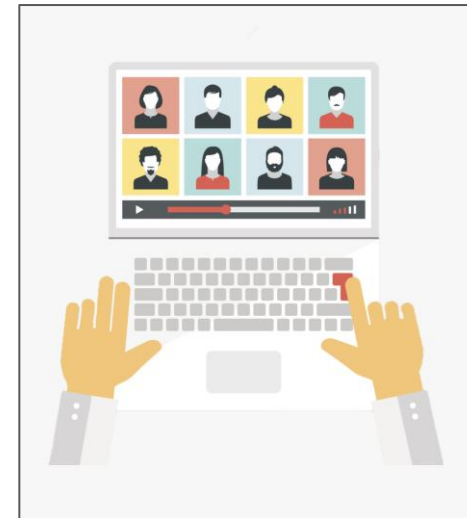


[Vector Graphics](#)

A Few More Expectations for Today

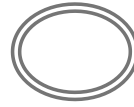


- Be open to the experience of others and accept non-closure.
- Speak your truth without blame or judgement.
- Stay muted if not talking.
- We invite you to keep your video on.



[Vector Graphics](#)

Learning Objective #1



Understand: Regulatory issues that affect school-based practice.



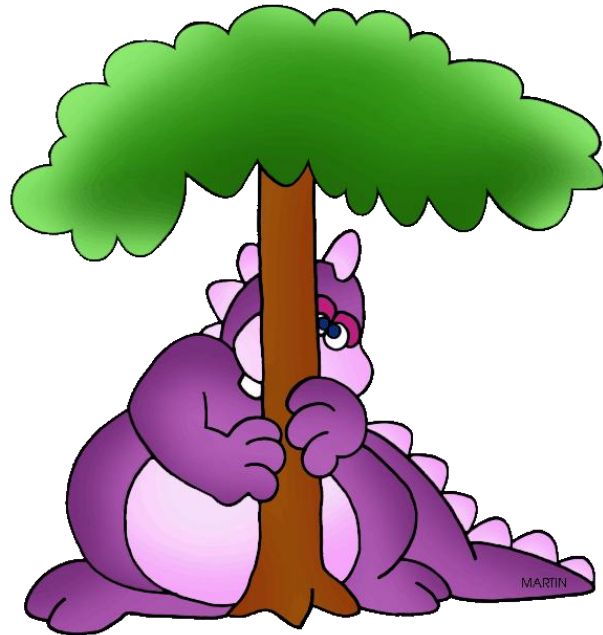
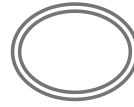
Where Do We Begin?

Let's start with a brief history School-based practice and regulatory considerations.

Oh, goody ...try to look interested.



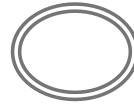
How are School-Based Services are Different?



Don't be shy.

How do you describe the difference between school-based services and community, medical-based services?

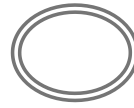
What Are the “Ahas” That Shaped Your Career?



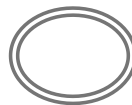
The “Ahas” That Shaped My Career



Singing From the Same Page



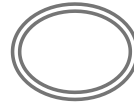
High Leverage Practices (HLPs)



HLPs include practitioners embedding instruction within and across routines, activities, and environments.

- A collaborative IEP process: Assessment, IEP development, & inclusive service delivery
- Begins with an Equitable Comprehensive Evaluation
 - Focus on the whole child
- Shared IEP team responsibility for the collaborative identification of student needs, development of educationally relevant goals, and alignment of services necessary to provide FAPE in the Least Restrictive Environment possible
 - Consideration of a continuum of Special education services, including Related Services
- Encompasses more than a push-in/pull-out dichotomy.

Nurturing All Learners



- Universal Design for Learning
- Consideration of the Whole Child
- Assessment and Interventions in Natural Environments
- Process for Collaborative Process to Identify Student Needs and Goals
- Inclusive Services
- Embedded Strategies

“We are all gardeners, planting seeds of intention and watering them with attention in every moment of every day.”

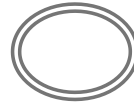
[Cristen Rodgers](#)

Evidence-Based Practice Knowledge Translation and Practice Development

Two of the most important gap areas:

- *Inclusive service delivery*
- Practitioners were not consistently writing goals that were specific to the individual child, within their school routine, functional and measurable.
- reported lack of training for school-based (participation-based) goal setting.

Regulatory Components of School-Based Practice



Federal/State
Laws & Regs
IDEA
Every Student
Succeeds Act (ESSA)
ADA Chapter 504

State Licensure
Requirements
& Practice Acts



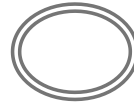
School-Based
OT & PT

Professional Code of Ethics
AOTA Code of Ethics
APTA Code of Ethics

District Practices
& Procedures

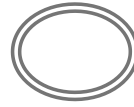
Adapted from Power-DeFur, 2018

Rules & Regs: The Big Takeaways



- Related service providers play a very specific role in school-based special education services as defined by IDEA
- Impairments alone are not a reason to provide educational therapy services
- Regardless of practice setting, practitioners are still accountable to your State Practice Act and Administrative Code
- Documentation requirements: IDEA, Professional Licensure Standards, and Medicaid SBS

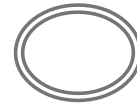
Free and Appropriate Education (FAPE)



The term “free appropriate public education” means special education and related services that—

- (A) have been provided at public expense, under public supervision and direction, and without charge;
- (B) meet the standards of the State educational agency;
- (C) include an appropriate preschool, elementary school, or secondary school education in the State involved; and
- (D) are provided in conformity with the individualized education program required under section 1414(d) of this title.

IDEA: Least Restrictive Environment (LRE)



IDEA Sec. 300.114 (a) (2)

(i) To the maximum extent appropriate, children with disabilities, including children in public or private institutions or other care facilities, are educated with children who are nondisabled;

School-based intervention is most effective when it is contextually based and integrated within the student's natural settings.

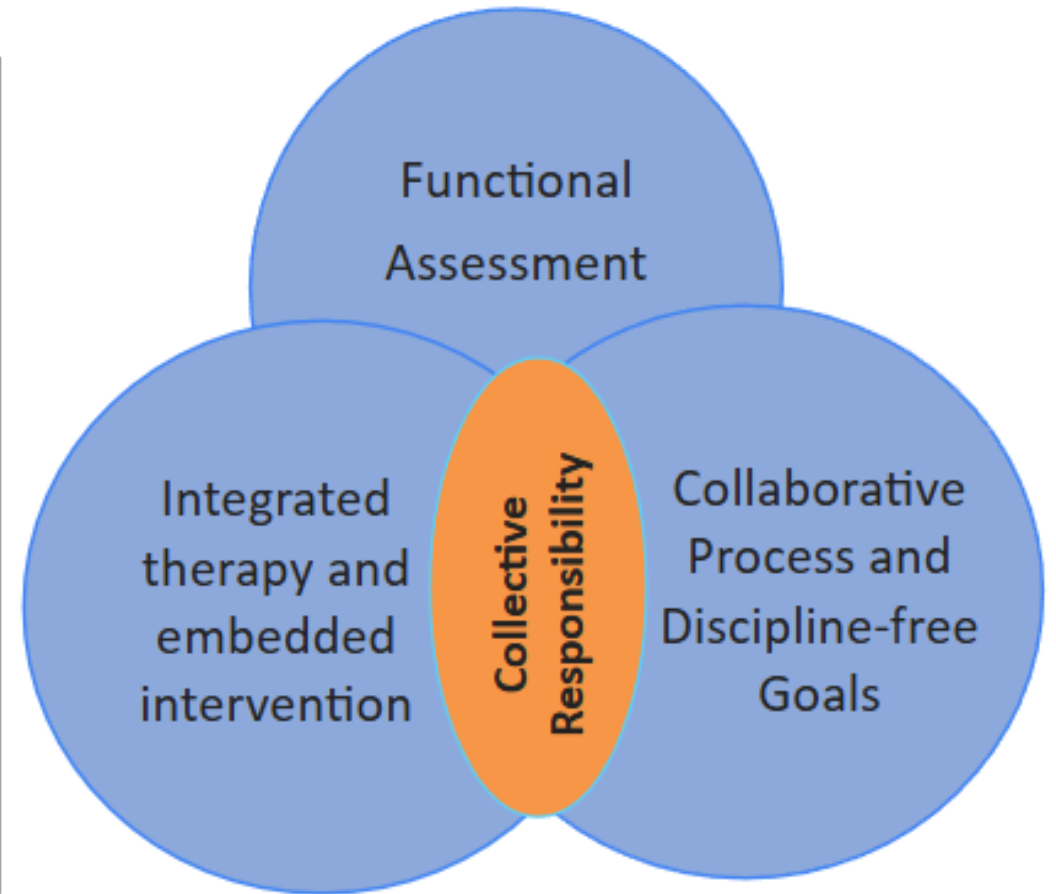
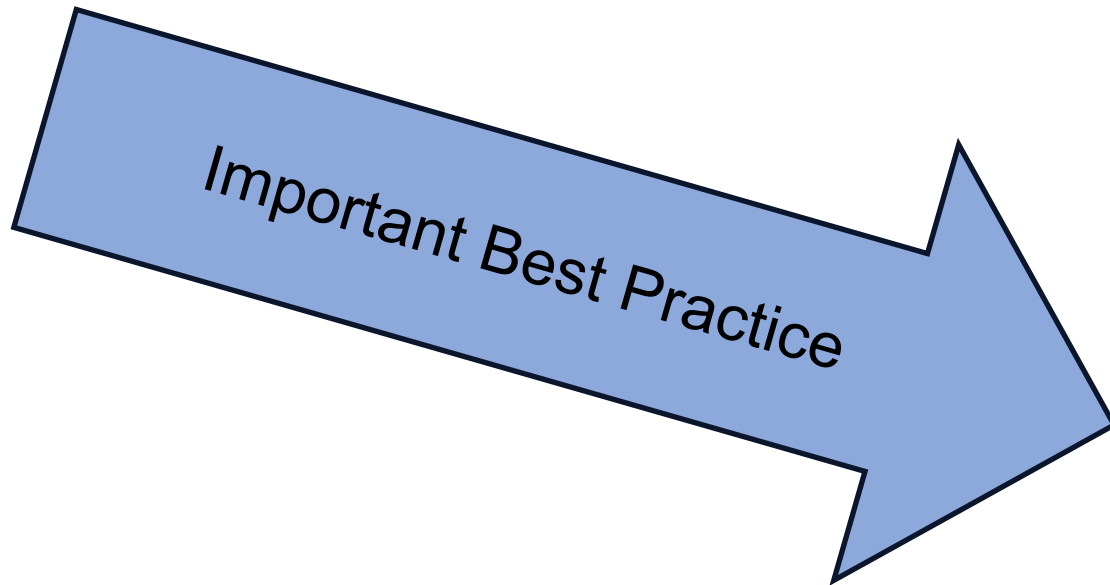
Handley-More et al., 2013

Providing services within the environment where a student is expected to perform also increases the likelihood that learned skills will be generalized.

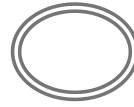
Polichino & Jackson, 2014

Integrated Services and Embedded Interventions

Important Best Practice



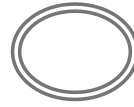
Educationally Relevant OT & PT Services



"Decisions addressing need for related supports have shifted from therapist recommendations focused on admission and dismissal criteria to empowering teams to identify meaningful educational relevant goals through identification of student interests, needs, values, and potential outcomes for future work and independent living."

Laverdure & Rose 2012

Considerations for LRE

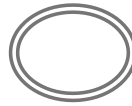


The IRIS Center:

Identifying the LRE involves making program decisions about what services and supports a student needs to be successful and where and how those services and supports can be provided effectively.

- Make progress toward meeting identified academic or functional annual goals
- Be involved and make progress in the general education curriculum, as well as to participate in extracurricular (e.g., drama club) and other nonacademic activities
- Take part in these activities with other students, both with and without disabilities

More LRE Considerations

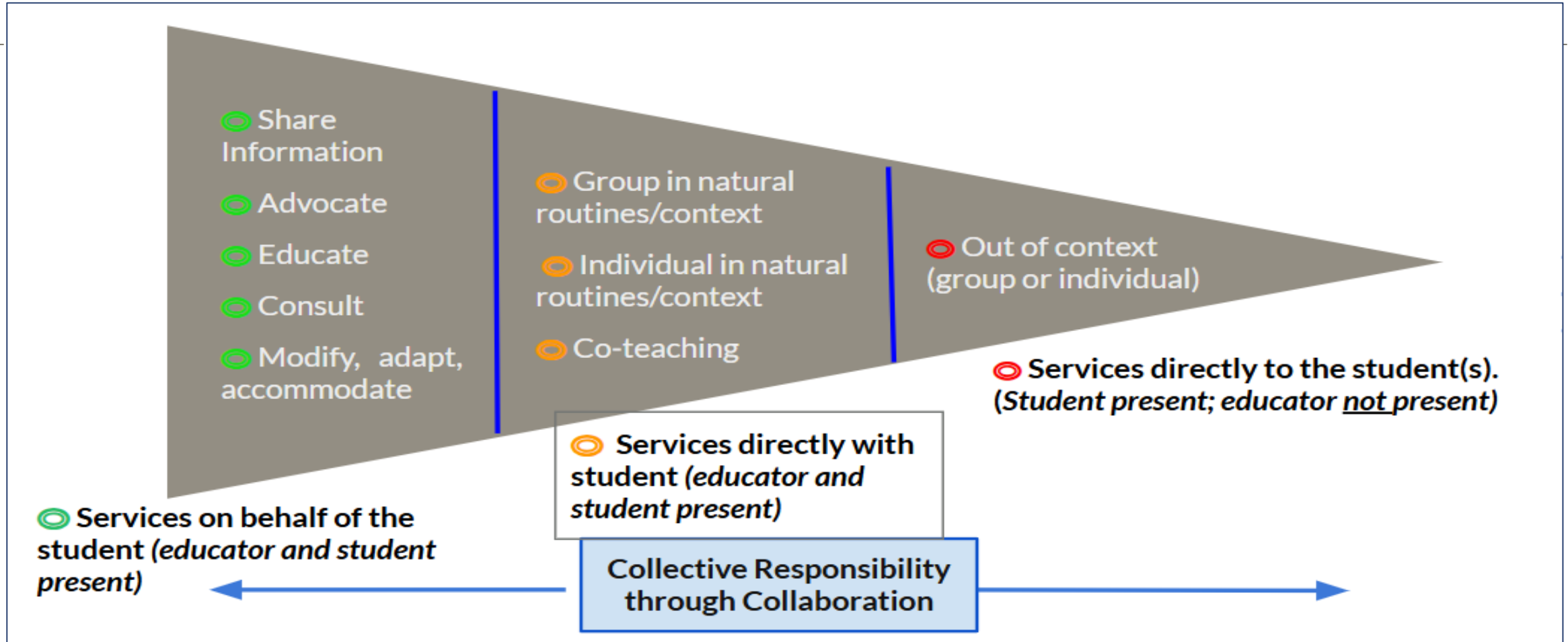


- Placement options are fluid.
- Placements can change over time based on a variety of factors.
- For some students, the general education classroom is not necessarily the least restrictive setting.

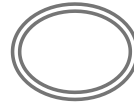


[ECTA Center: Preschool LRE Reference Points and Discussion Prompts](#)

The Continuum of Service Delivery Supporting LRE



Critical Component for Embedded Interventions



Role Release

Shared Expertise:

Professionals train and empower each other and family members to perform tasks and activities typically reserved for their specific discipline.

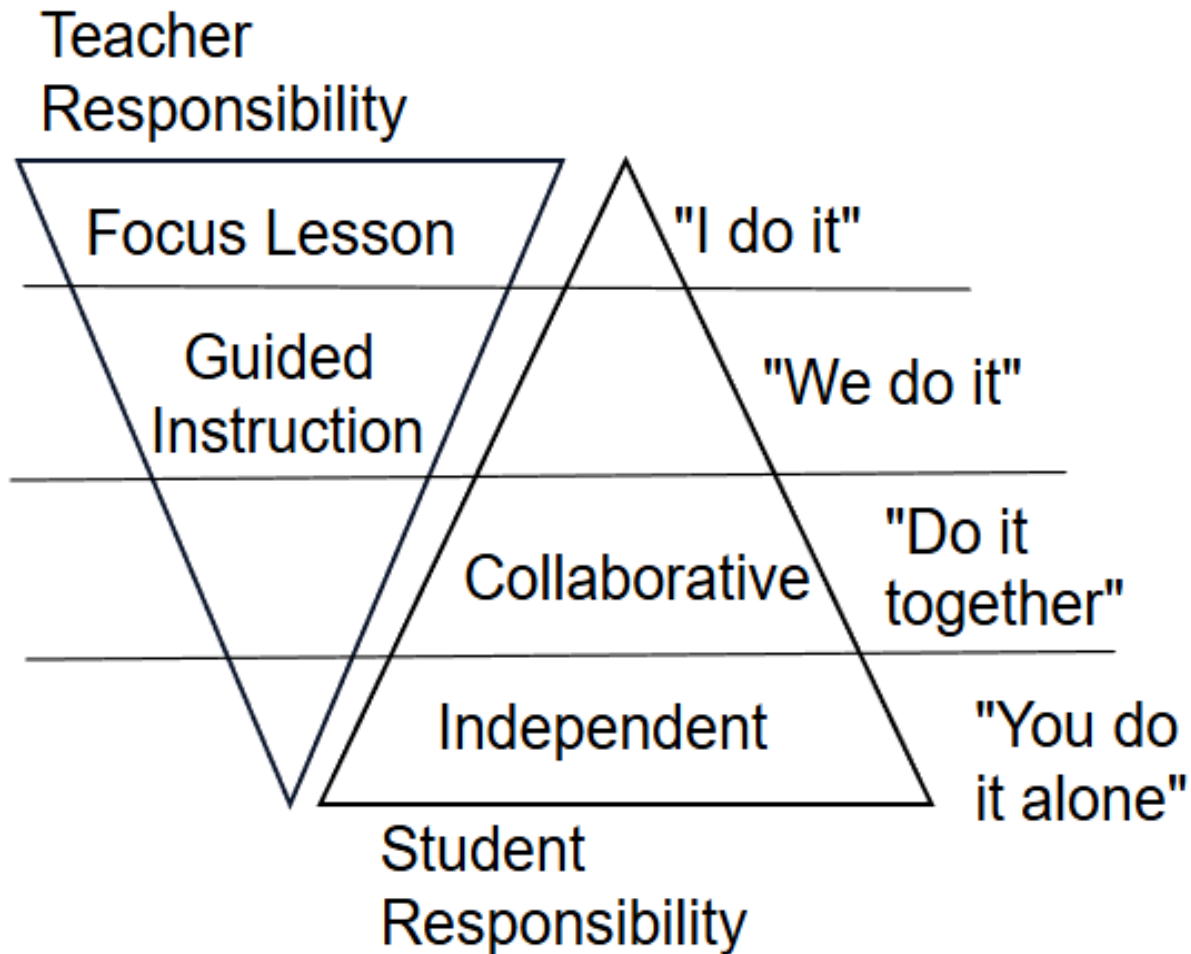
Cross-Training and Supervision:

Individuals learn and practice aspects of other professionals' roles under appropriate supervision and within their competence boundaries.

Resources:

- [Letting It Go...Role Release and Why It Can Be Hard](#)
- [Aspects of Role Release in the Provision of Services to Young Children](#)

Gradual Release of Responsibility



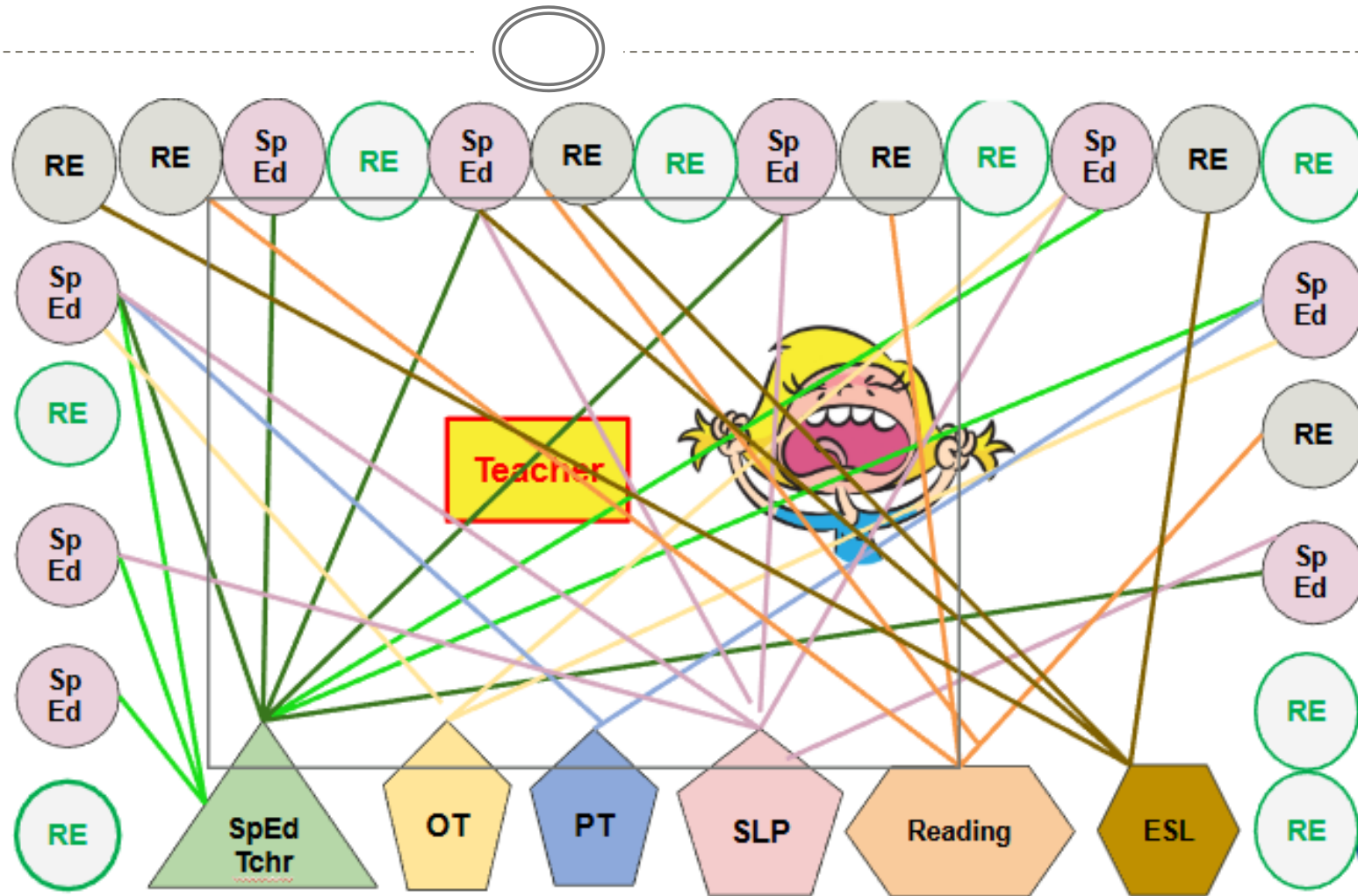
Co-teaching models Gradual Release of Responsibility

- The goal of the Gradual Release of Responsibility Framework is to provide appropriate instruction, moving students towards independence.

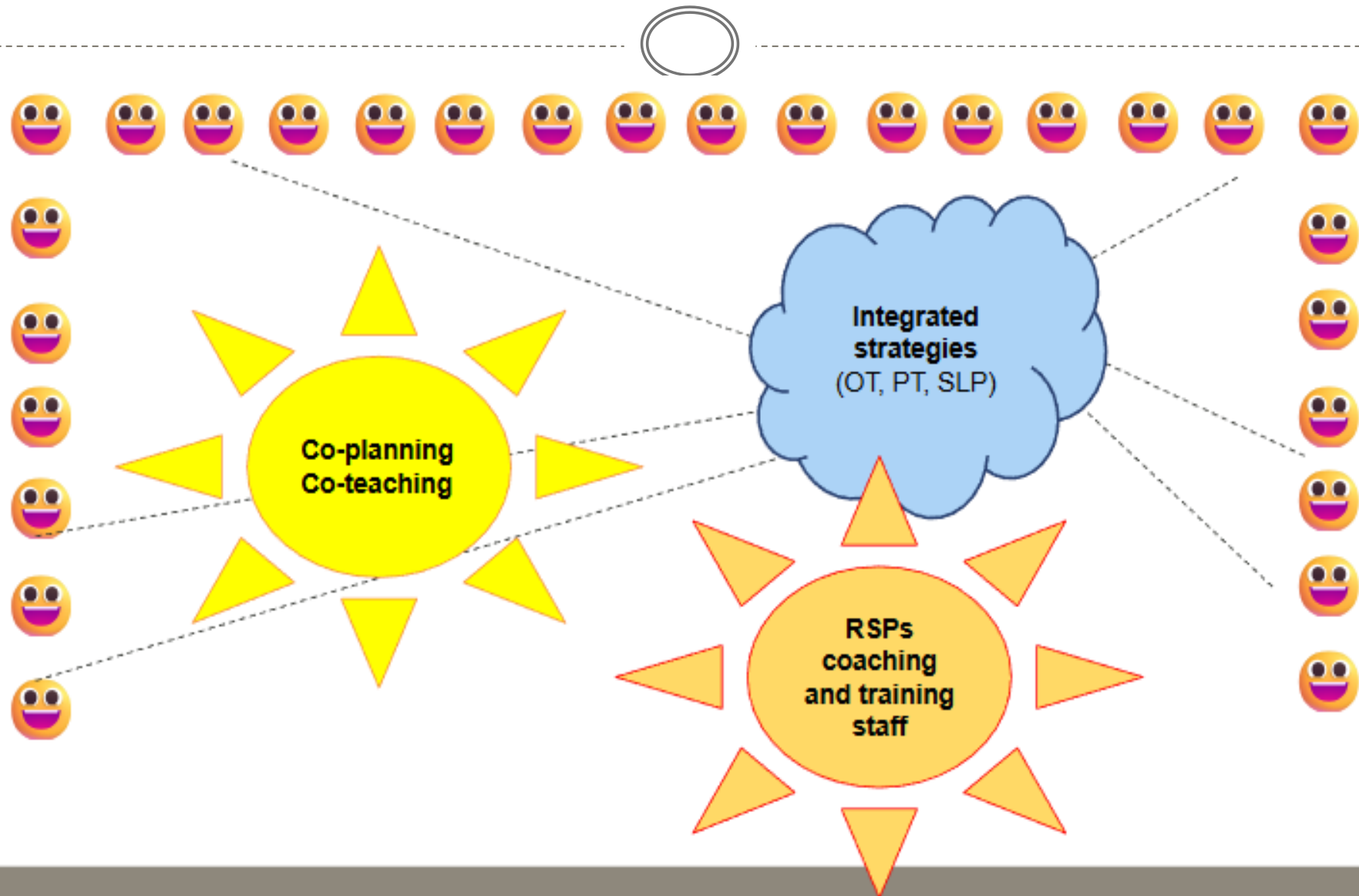
Check out
[The CO-OP Approach](#)

Typical Classroom Day When Using a Pull-Out Model

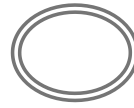
Adapted from:
Causton &
Pretti-
Frontczak
Presented
at WI
Inclusive
EC Series,
2023



Classroom with Integrated Special Education Services



Hot Topic - Belonging and Participation



Let's talk about why the concept of LRE is important.



Check out References and Resources handout for live link to this new article: “An International Scoping Review on Inclusive Education from Multiple Perspectives: Co-Creating Inclusive Experiences in Shared Occupational Situations.” Echsel, et. al., 2025

AOTA & APTA

Agree on The Importance of Participation

School-based OT and PT guidelines:

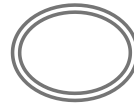
- Specify that goals should support the student's *participation* during educational activities and daily routines in natural environments.
- Recommend establishing IEP goals before determining the need for OT or PT to address any of the goals.

Division for Early Childhood; New York City; FL, KY, MD, NJ, OK, VA, PA, WI

[AOTA, APTA, ASHA, Joint Statement on Interprofessional Collaborative Goals in School-Based Practice](#)

- Highlights a collaborative process for IEP teams to identify student needs and develop IEP goals.

APTA

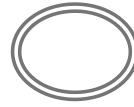


Physical therapists can foster academic performance, school participation, and obesity prevention by influencing school programs, routines, and curricula to address the motor proficiency of students in developmentally appropriate ways.

[The Role of School-based Physical Therapy:
Successful Participation for All Students](#)



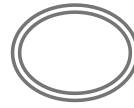
More from APTA



- An APTA fact sheet suggests that the physical therapist is the practitioner of choice when “difficulty with functional posture or mobility are the primary factors interfering with other areas of development and participation.” Vialu 2017
- The primary role of school-based physical therapists is promoting access to campus, programs, learning and student life, and supporting participation, and academic performance.

[APTA FACT SHEET Developing Collaborative IEP Goals](#)

AOTA



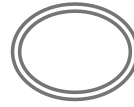
- Occupational therapy maximizes health, well-being, and quality of life for all people, populations, and communities through effective solutions that facilitate participation in everyday living.
- Occupational therapy excels in working with clients and within systems and daily routines to produce effective outcomes.



[AOTA Vision 2025](#)

[AOTA Occupational Therapy Practice Framework: Domain and Process Fourth Edition](#)

Participatory Occupational Justice Framework

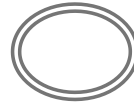


- This framework specifically points to school-based practice as a place where the POJF may inform practice.
- In this setting, therapist may advocate for justice for the students they work with such as ensuring education in the least restrictive environment as well as working to make sure children receive the services, they are due.



Handout: [“The Participatory Occupational Justice Framework](#)

Belonging

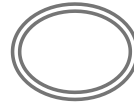


Supporting
Inclusive Practices
for Students with
Disabilities



[CDE https://ed.cde.state.co.us/cdesped/resources/supporting-inclusive-practices-for-students-with-disabilities](https://ed.cde.state.co.us/cdesped/resources/supporting-inclusive-practices-for-students-with-disabilities)

Rightful Presence

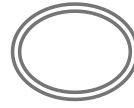


*For more information,
visit the
[SWIFT National Center](#)
[on](#)
[Inclusion Toward](#)
[Rightful Presence.](#)*

Rightful Presence and Inclusive Early Education Programs as the First Consideration for Children with Disabilities Emphasizes belonging, equitable access to resources, and active participation in learning and social opportunities alongside peers without disabilities.

(Portions of this section curated from ChatGPT)

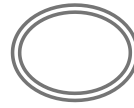
Key Principles of Rightful Presence



- Education comes first
- Natural environments matter
- Pull-out is not the default
- The student doesn't "earn" access through therapy



School-Based Services Support Educational Needs

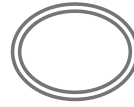


Therapy should support the student's functioning all school environments and not remove them from instruction unless there's a clear education-connected reason.

A student has rightful presence in

- Classrooms
- Hallways
- Playgrounds
- Cafeterias
- Buses
- And all other school environments because those are part of their school day

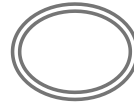
Leadership Challenge: Belonging and Justice



Belonging: Schools establish environments conducive to student learning and growth by building a culture of true belonging that recognizes students' full humanity and inherent value and enables them to freely bring their culture and whole selves into the school.

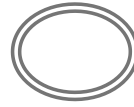
Justice Driven Leadership: Leaders ensure educational policies, systems, and practices are equitable and just by shifting systemic power dynamics and ensuring that general education curriculum and classrooms have the resources and support they need to realize the rightful presence and learning potential of every student.

What Rightful Presence Is Not



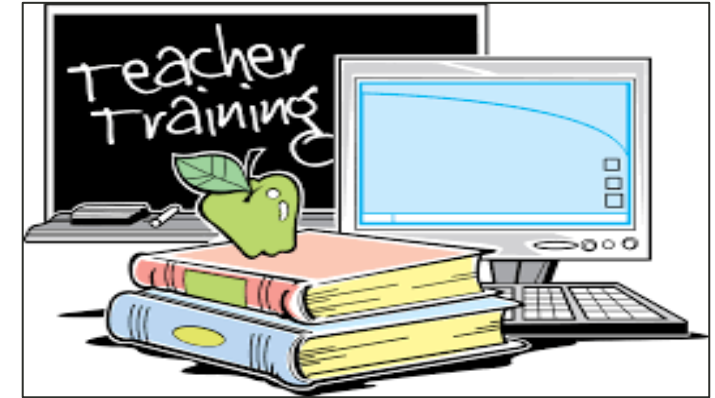
- ✗ A student being pulled from class simply because they “need therapy”
- ✗ Therapy goals that are disconnected from school participation
- ✗ Using therapy as a reason to remove a student from peers or instruction
- ✗ Providing services only in a therapy room by default

Apply to Your own Practice

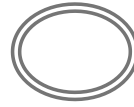


What you should consider for development of a professional development training for your district or creation of a handout for educators, families, and administrators:

- What Is “Rightful Presence”?
- Why Rightful Presence Matters
- What Rightful Presence Looks Like in Practice
- Role of School-Based OT & PT



Rightful Presence: Innovative Teaching



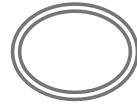
Innovative Teaching and Learning

Grade-level and content instructional teams organize lessons, activities, and assessments aligned with standards, at various depth, breadth, and complexity, within a systems-level integrated instructional system that leverages the best available resources.



[SWIFT](#)
[National Center on Inclusion](#)

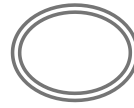
I Love this Comment



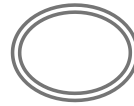
"Neurodiversity-affirming practice emphasizes the importance of celebrating neurodiversity and valuing different ways of being and doing, making sure not to try to change behaviors only because they are different from the social norm, rather focusing on changing the environment or task to promote participation."

Rajotte, et. al., 2024

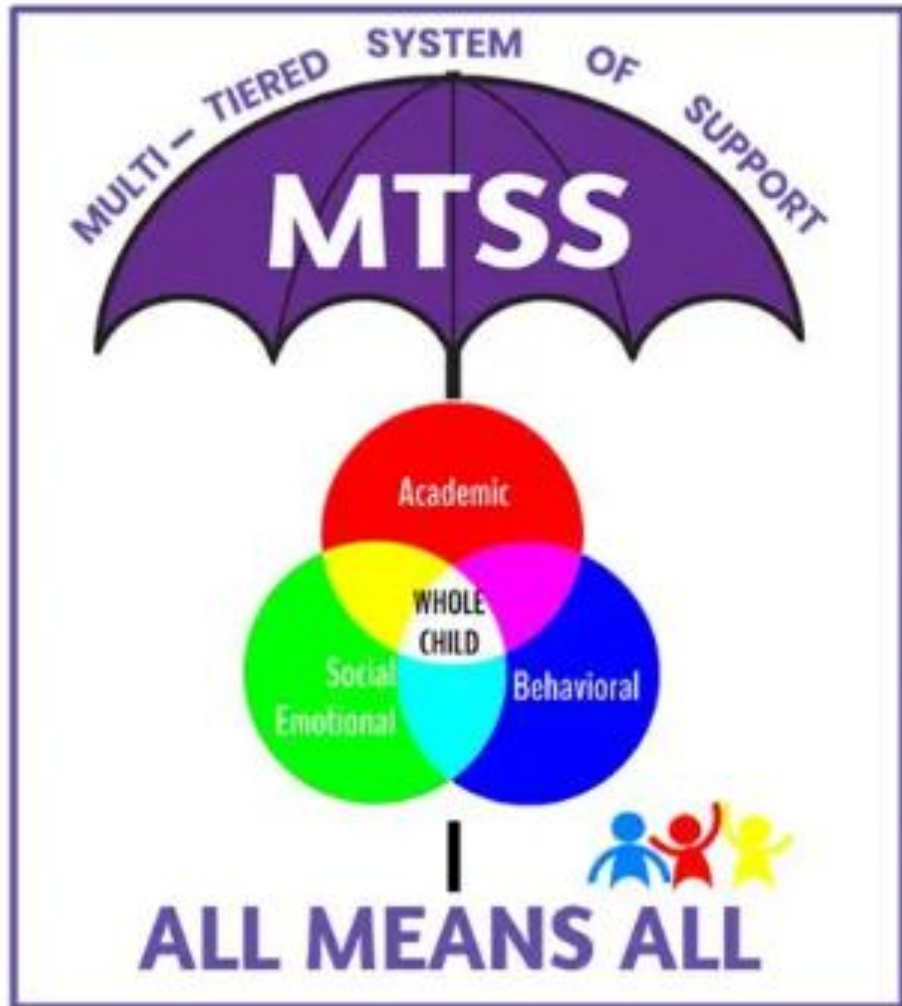
Don't Make Assumptions About Our Students!



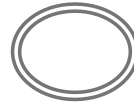
Learning Objective #2



Describe: The role of OT and PT in MTSS



An Avalanche of Referrals



The Youngest Pandemic Children Are Now in School, and Struggling



“I can’t tell you the number of families who say their kids are anxious or depressed — and they’re little ones, 4 or 5.”

Heidi Tringali, occupational therapist, Charlotte, N.C.

“They’re coming in and they don’t know how to play.”

Brook Allen, kindergarten teacher, Martin, Tenn.

“I had some kids who went on to kindergarten who still did not know a triangle.”

Lissa O’Rourke, preschool teacher, St. Augustine, Fla.

Post-Pandemic Data

“We find younger students and students who were already needing academic support are the furthest away from reaching pre-pandemic growth trends.”“ For districts, this means taking an equally nuanced approach to their data to evaluate if intervention efforts have made an impact.

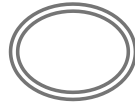
[Student Growth in the Post-COVID Era](#)

[New data](#) [July 2024] points to the pandemic’s profound and enduring effects on the nation’s youngest public school children, many of whom were not yet in a formal school setting when COVID hit. [The pandemic set younger kids back. Their struggle to recover is especially acute, data shows.](#)

“A variety of scientific [evidence](#) has also found that the pandemic seems to have affected some young children’s early [development](#)”

[NYT July 1, 2024](#)

Delay versus Disorder?



There is not always a straightforward answer to this question.

- delay in acquisition of language (motor, learning readiness, mobility, etc.) skills compared to one's chronological and cognitive/intellectual age-peers
- delay may exhibit a
- slower onset of a skill
- slower rate of progression through the acquisition process
- varied sequence in which the skills are learned, or all of the above.



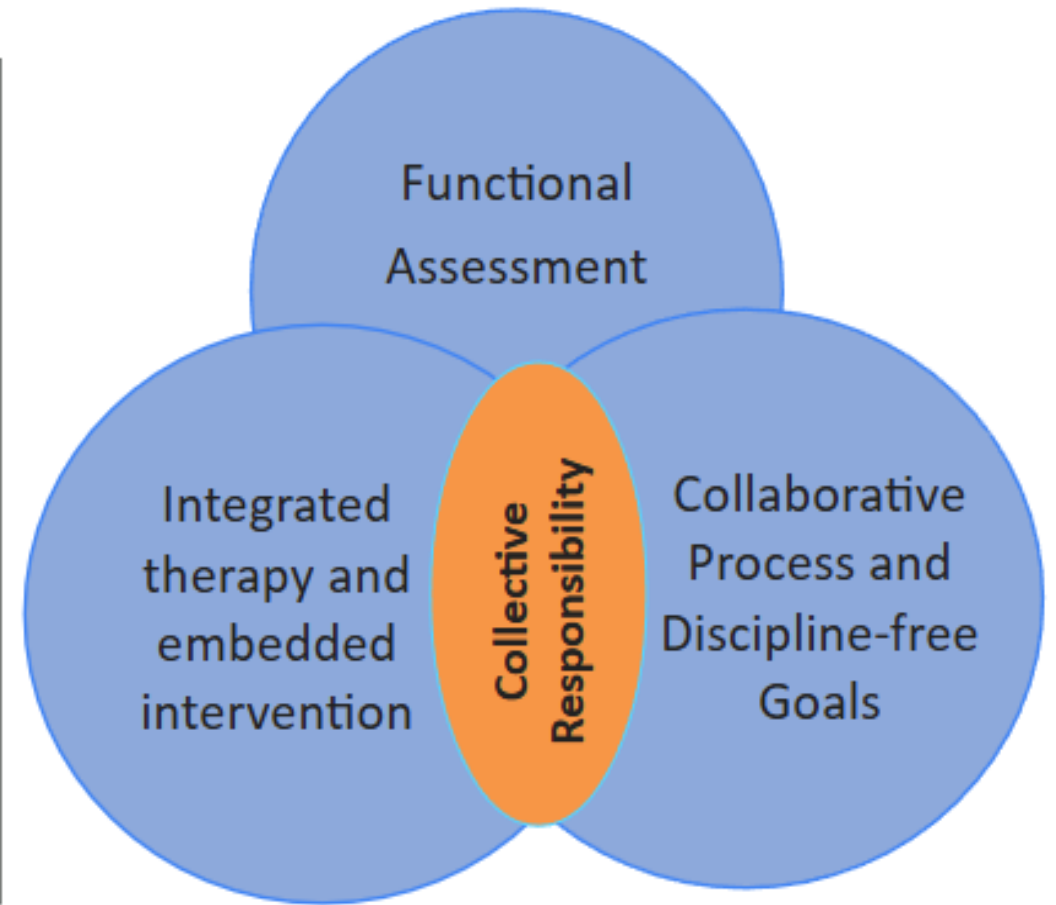
[ASHA WIRE: How Do You Know When it's a Language Delay Versus a Disorder?](#)

IDEA & ESSA

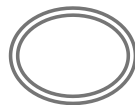


Two federal laws to guide OT and PT school-based practice:

1. [Every Student Succeeds Act \(ESSA\)](#)
2. [Individuals with Disabilities Education Act \(IDEA '04\)](#)
 - a. Both mandate that educators use, to the greatest extent possible, evidence-based academic and behavioral practices and programs.



10th Anniversary of ESSA

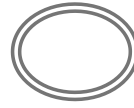


- This shift to a "whole child" approach acknowledged that learning is about more than academics—it's about participation, relationships, and meaningful engagement throughout the school day.
- Together, IDEA and ESSA have created a framework where access is paired with the supports needed for true inclusion.



Saffer, A., (2025)

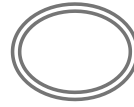
Every Student Succeeds Act of 2015 (ESSA)



ESSA: Federal law specifically names OTPs, PTPs, and SLPs as Specialize Instructional Support Personnel (SISPs) that contribute to physical and mental health programming for ALL students.

- **This is Regular Education Legislation**
- **Emphasis on Universal Strategies**

ESSA 2015



Recent Updates

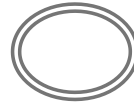
- [FAQs: Transitioning to the ESSA](#)
- [Key ESSA resources, including guidance and regulatory information](#)
- [Elementary and Secondary Education Act, as amended by the Every Student Succeeds Act \(PDF, 1.2MB\)](#)

Every Student Succeeds Act

US law passed in 2015



Colorado Multi-Tiered System of Supports (CO-MTSS)



OFFERED SERVICES

Multi-Tiered System of Supports (CO-MTSS)

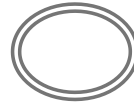


CO-MTSS

Colorado Multi-Tiered System of Supports (CO-MTSS) is defined as a prevention-based framework of team-driven data-based problem solving for improving the outcomes of every student ...



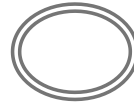
Something to Think About



A comprehensive evaluation exists within a district's multilevel system of support and represents a collaborative effort between families, general educators, related services, and special educators to understand a student's needs.

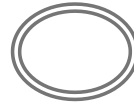


CO-MTSS Includes Five Essential Components



1. Team-Driven Shared Leadership
2. Data-Based Problem Solving and Decision-Making
3. Family, School, and Community Partnering
4. Layered Continuum of Supports
5. Evidence-Based Practices

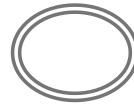
OT & PT Roles in MTSS



Advise and co-plan with districts about Universal Supports: High-quality instruction in the general education classroom

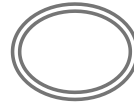
- Targeted Supports: Academic or behavioral support to students moderately at-risk
- [Guidance Related to OSEP's Letter to Couillard APTA Every Student Succeeds Act \(ESSA\)](#)
- [AOTA Debunking Eight SISP Myths Occupational Therapy's Role as SISP's Under ESSA](#)
- [Every Moment Counts: About Occupational Therapy](#)

SISPs Can Address



1. School-wide approaches to school safety and violence prevention.
2. Positive behavioral interventions, supports, and other programs that promote supportive discipline practices
3. Support for the Elementary and Secondary School Counseling Program and other school-based mental health services
4. Anti-bullying measures and policies that support non-discrimination
5. Suicide prevention
6. Crisis prevention, intervention, and postvention services

Tiered Interventions You Can Support



Tier 1

- Proactive
- Preventive
- Potential to reduce stigma

Tier 2

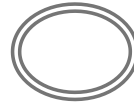
- Students who are selected due to demonstrating risk factors
- Students at risk for developing disorders
- Programs designed to match child's need to interventions
- Help students to set priorities and goals
- Design, monitor, and measure outcomes



The National Alliance of Specialized
Instructional Support Personnel
(NASISP)



Trauma Informed Schools



Tiered interventions

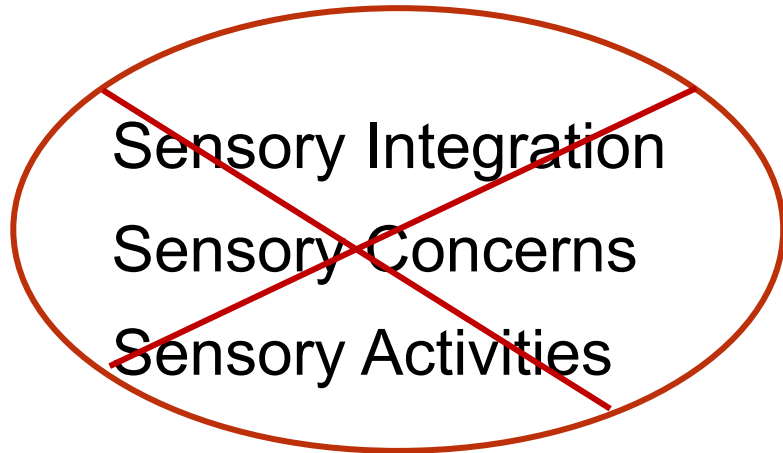
- Tier I; Integrate activities focused on:
- Building personal competency
- Developing social skills
- Identifying and strengthening personal assets
- Embed social-emotional learning opportunities into the curriculum

[Brain Breaks Movement Cards Superhero Theme](#)
PreK – 5th

[Superheroes Break Cards](#)
PreK – 4th

[36 Printable communication cards for children / Superhero theme](#)

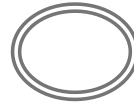
Changing the Narrative: Sensory Integration is not Synonymous with Self-Regulation



Instead say:

- Self-regulation
- Behavior Regulation
- Emotional Regulation
- Planning/organization
- Adaptability/flexibility

MTSS and IEP Strategy: Co-Teaching



GUIDING PRINCIPLES/TERMS

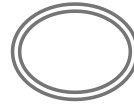
The Co-teaching Practice Profile defines the essential attributes of an equitable co-taught learning environment which is inclusive of each and every learner.

The core competencies include:

- Designing Physical Space and Functional Structures
- Planning Learning Experiences for All Learners
- Delivering Targeted, Individualized Instruction
- Assessing Student Learning and Providing Feedback

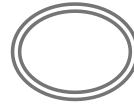
From: WI DPI [Co-Teaching Practice Profile - Version 1.0](#)

Mental Health Issues and Mental Health Supports



- [AOTA School Mental Health Toolkit Intervention Matrix](#)
- Occupational Therapy's Role in Mental Health Promotion, Prevention, & Intervention With Children & Youth
 - [Childhood Trauma](#)
 - [AOTA Anxiety Disorders](#)
 - [Social and Emotional Learning \(SEL\)](#)
- [AOTA Mental Health Promotion, Prevention, and Intervention in Occupational Therapy Practice](#)
- [Self-Regulation Assessment Rubric](#)
- [Tiered Interventions for Mental Health](#)

The Importance of Self-Determination

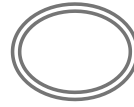


- Self-Determination Strategies Toolkit
- An easy-to-use approach aimed at transforming children's attitudes from helpless to confident!
- Increase student engagement and enthusiasm
- Each strategy is evidence-informed and can have a profound impact on children's lives today and in the future.

 **Self-Determined Kids**

Website:
[Self-Determined Kids](#)

Affirming Meaning for Children

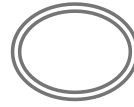


Reframing disabilities research:

"Much of the literature surrounding pediatric disability focuses on the medical model: what is wrong with the body and what can be done to correct it. This frame limits our understanding of how children like Savannah engage in the world. By focusing instead on strengths, preferences, and meaningful engagement, researchers and practitioners can uncover how children make sense of their environments, relationships, and themselves."

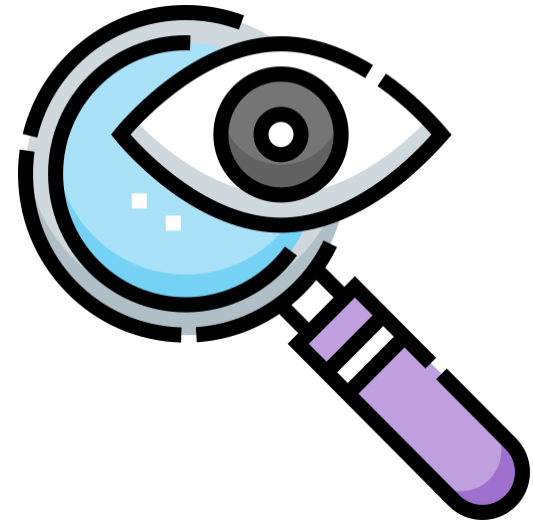
Agostine, S., 2025

Assessment: Where Do We Begin?



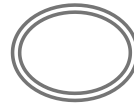
Considerations for MTSS, universal strategies, and special education assessment:

- Observe with intention
- Shift from deficit to strength
- Support without judgment
- Facilitate opportunities



Agostine, S., 2025

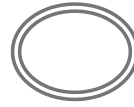
Reframing Disability



"Each moment of independent action is a result of layered support, family belief, and environmental facilitation."

Agostine, S., 2025

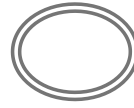
"Each movement reveals something more."



- She wipes the table with a rag her mother gave her, using big, expressive motions.
- She moves slowly to the edge of her chair, using her hands for support and adjusting her balance intentionally.
- She grabs a baby doll stroller, and it catches on the raised threshold leading into the kitchen.
 - She lifts the back wheels. She pushes and lifts repeatedly before the stroller finally goes over the threshold into the kitchen. Savannah follows, bringing it with her as she moves toward her mother and sister.

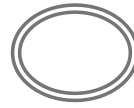
Agostine, S., 2025

Learning Objective #3

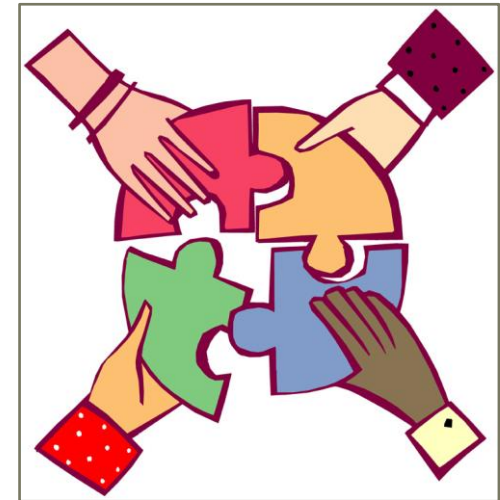


Identify: Best practices for comprehensive, participation-based assessment and interventions that lead to improved student outcomes.

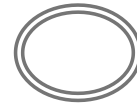
Review: Best Practices for School-Based Services



1. Contextual/Authentic Assessment (Top-Down)
2. Use of evidence-based literature to inform practice
3. Engagement in a collaborative model of data collection and service delivery
4. Embedded and integrated services
 - a. IEP goals focused on student participation, not discipline specific goals

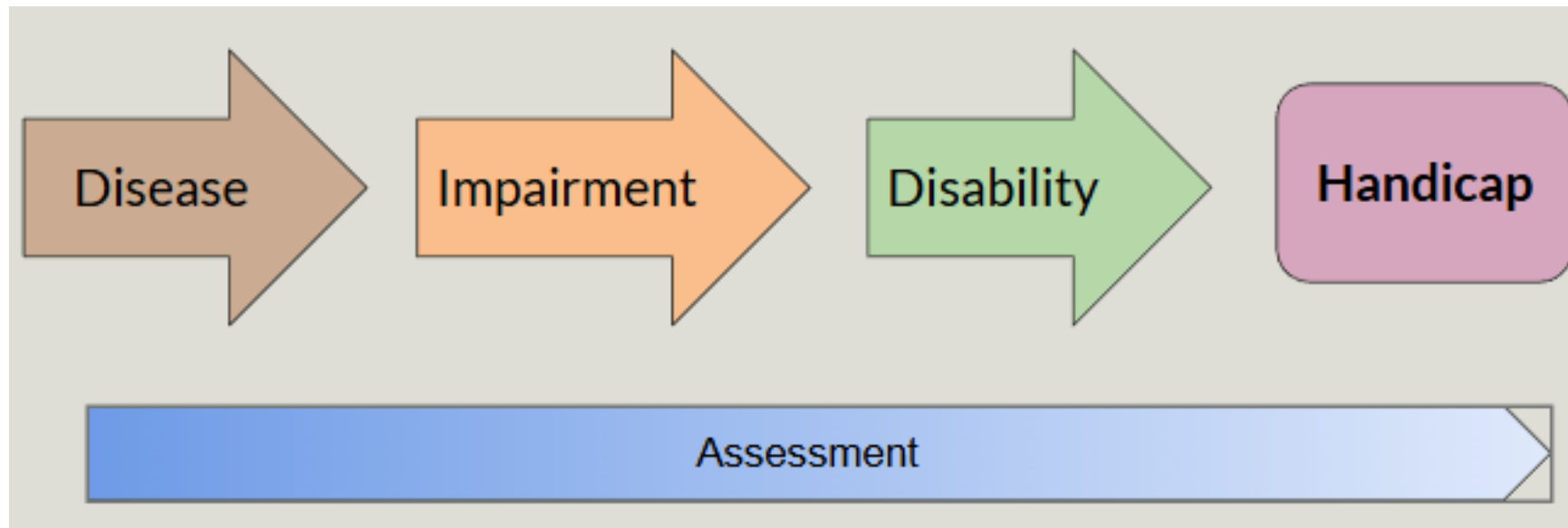


Historical Perspective

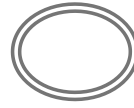


International Classification of Impairments, Disabilities, and Handicaps

WHO 1976

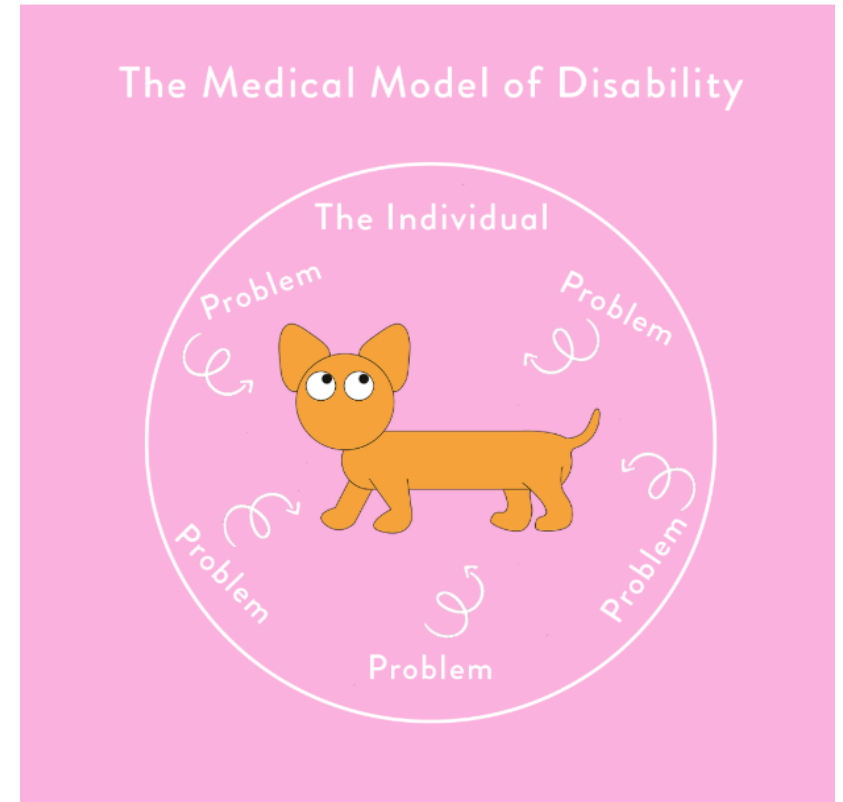


The "Medical Model" of Disability



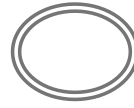
The “medical model of disability” has long informed mainstream public and professional perceptions of disability, and views disability as a problem that exists within a person’s body, only to be solved by medical doctors.

- This model frames the body of a person with a disability as something that needs to be “fixed,”



Social Creatures

The Social Model of Disability Explained

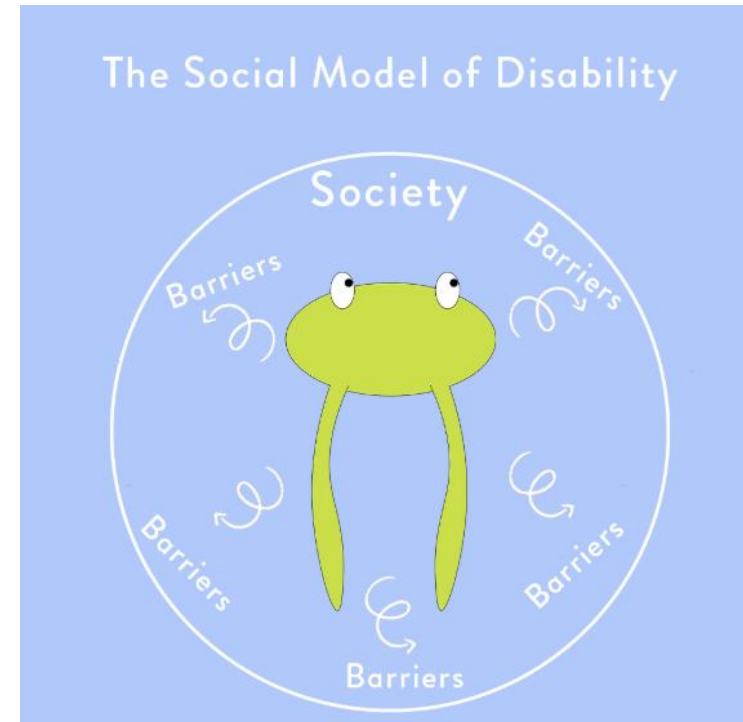


My favorite way to explain it:

"One is only as disabled as society makes them."

"Ultimately, the social model of disability proposes that a disability is only disabling when it prevents someone from doing what they want or need to do."

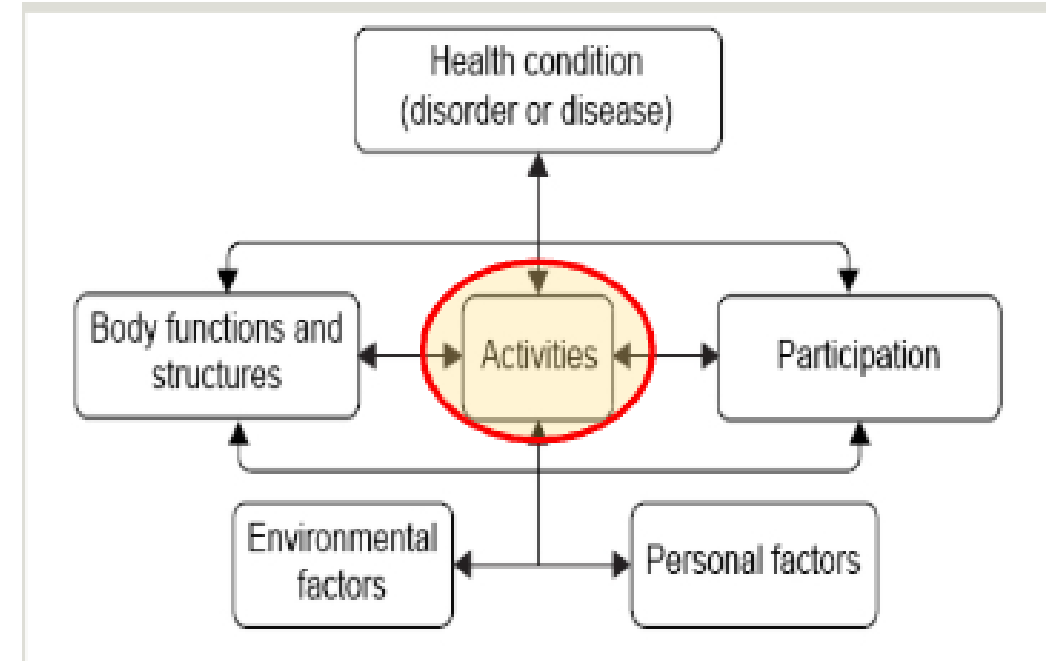
[Social Creatures](#)



The International Classification of Functioning, Disability and Health (ICF)

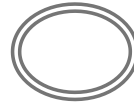
Social Model of Disability

- Shifting our focus from an "impairment" model to an "enablement" model for assessment and intervention.
- Remediation of impairments is not the outcome or goal of school-based (OT, PT) intervention.



[ICF World Health Organization \(WHO\)](#)

High Leverage Practices: Focus for This Session



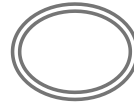
#1. Collaborate with professionals to increase student success.

#4. Use multiple sources of information to develop a comprehensive understanding of a student's strengths and needs.

#5. Interpret and communicate assessment information with stakeholders to collaboratively design and implement educational programs.



Changing the Course of Best Practices



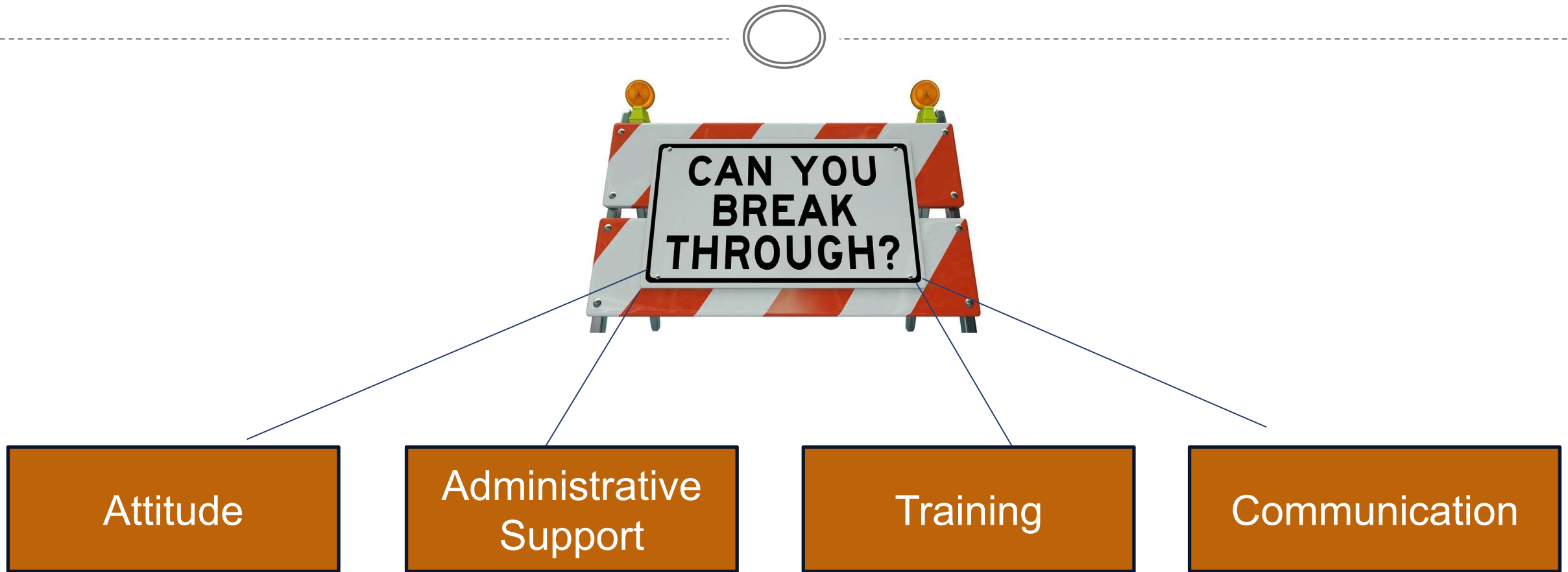
Changing Understanding or educators, parents, and sometimes us!

If a student has an identifiable therapy need which does not prevent the student from accessing or progressing in their educational program, then school-based therapy is not needed.

Sharable Resource:
WI DPI

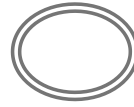
[The Role of Medical and Clinical Information in Special Education Evaluation and IEP Development](#)

Barriers to a Collaborative IEP



Nicholas Martin

Common Practice Barriers to Collaborative IEP Process



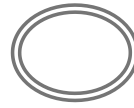
- Groups of individuals serving the same student do not always function as a team.
- Typically, no process is used to assist in making related-services decisions
- Each discipline develops separate goals based on discipline-specific assessments.



Giangreco, et. al., (2010)

[Roles of Related Services Personnel in Inclusive Schools](#)

Therapy Practices: Break Through the Barriers



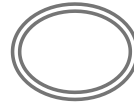
- Related-services planning, implementation, and evaluation often are unrelated to the educational program.
- Pull-out approaches that do not match the intended educational functions of related services are used.



Giangreco, et. al., (2010)

[Roles of Related Services Personnel in Inclusive Schools](#)

“Educationally Relevant Services”

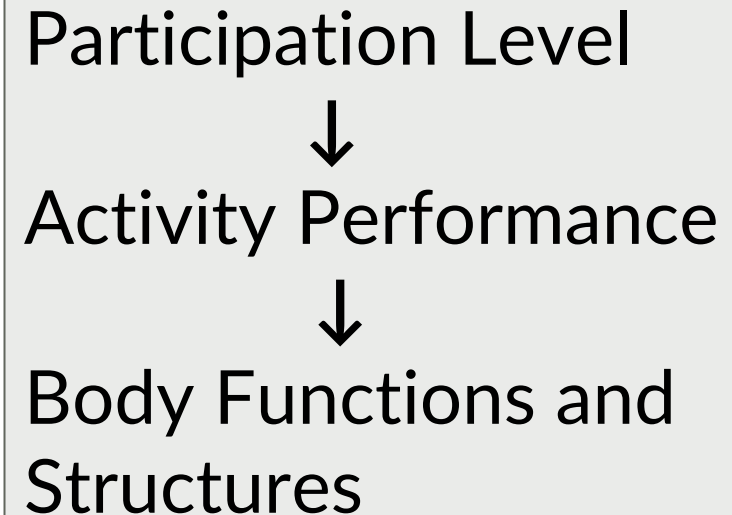


A best practice model for school-based services “focuses on activity and participation instead of impairment.”

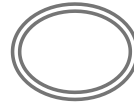
Laverdure 2012

Use of a top-down model for assessment helps us to better understand if the child can do what they need and want to do?

- In natural contexts?
- How can we find out?



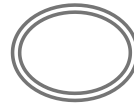
Issues with Norm-Referenced Test Data



- Normative sample is limited and may not represent linguistic or cultural differences
- Documentation of educational impact and functional performance in natural environment is missing
- Standardized assessments based on a single administration does not accurately reflect a child's performance within his or her natural environment.

[List of Assessments of Function and Participation for Related Service Providers](#)

Functional Assessment



Research has shown that assessment and intervention set in the natural environment and embedded in class routines

- Increase the efficacy of intervention
- Increase achievement of IEP goals
- Increase the motivation of the student, teacher... (and parent)

Assessment of Participation
a.k.a
Top-down Assessment

What We Need to Figure Out

What is a barrier?

What limits access, engagement, or participation?

What is a need?

What do they need to reduce or eliminate the barrier?

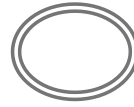
What is a support?

SAS? SDI? Related Services? PM&S?

*Adapted from
Shelley Moore
Keynote Address
WI Statewide
School-based
OT & PT
Conference
CESA 1 2024*

Shelley
MOORE PH.D.

Encourage IEP Teams to Dig Deep



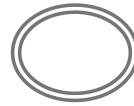
Functional Skills are those skills or activities which are not considered academic or related to a child's academic achievement included in PLP. Include areas of strength!



Areas of assessment may include:

- Self-care, school, work and play habits
- Health-enhancing physical activity
- Transitioning across settings and activities
- Organization
- Social and emotional skills
- Accessibility to school campus and community

Ecological Assessment



Ecological assessment allows the team to make decisions about accommodations, modifications and/or appropriate adaptive equipment that may facilitate student participation.

Ecological assessment involves stakeholders to identify student performance challenges and assist in their analysis.

- Observation in contexts of concern.
- What the student is expected to do and what are peers doing?

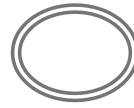
[The “Why” of Ecological Assessment](#)

[The “What” of Ecological Assessment](#)

[The “How” of Ecological Assessment](#)

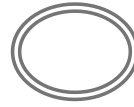
Cecere, 2021

The Secret to Participation-Based Assessment



*It starts with
observing and
assessing
participation.*

The Next Challenge for You



The Embodied Practitioner: PROOF Enhances
Embodied Reflection and Professional Reasoning
Porter, 2025

FREE:
Professional Reasoning and Reflection
on Observation: An Organizational Framework
[PROOF | Home](#)

One More Collaborative Assessment Tool for OTs and PTs

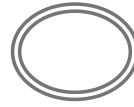
Collaborative Assessment Tools

Antecedent-Based Interventions	Functional Behavior Assessment	Social Skills Training
Cognitive-Behavioral Interventions	Modeling	Structured Play Groups
Differential Reinforcement of Other Behaviors	PECS	Video Modeling
Exercise	Scripting	Visual Supports

Functional Behavior Assessment Summary Report
[CDE Forms & Tools](#)

Wong et al 2014

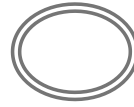
Apply to Your Own Practice, Activity #2



Scale for the Assessment of Teachers' Impressions of Routines and Engagement (SATIRE)

1. Download forced copy of SATIRE
2. Think of a student on your caseload
3. Select 3 areas of participation and complete it with information you might get from your own observations as well as from interview with other team members (OT, PT, SLP, SpEd teacher, Reg Ed teacher, paraprofessional, etc.
4. Calculate the "Fit" score for your student in your selected areas

Functional Outcomes



What is a functional outcome?

Functional outcomes describe children's mastery and appropriate application of behaviors, knowledge and skills in meaningful ways in their everyday lives, across a variety of settings.



COLORADO
Department of Education

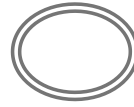
Functional Outcomes = IEP Goals that Are Not Discipline-Specific



Think of activities within these areas:

- Academics
- Learning Readiness
- Cognitive Learning
- Communication
- Independence & Self-determination
- Social & Emotional Learning

Use of Indicator 7 in Assessment and Goal Setting

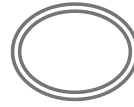


Measurement

- The state must report on 3 outcomes:
- A. Positive social-emotional skills (including social relationships);
- B. Acquisition and use of knowledge and skills (including early language/communication and early literacy); and
- C. Use of appropriate behaviors to meet their needs.

[CDE Indicator 7 - Preschool Outcomes](#)

Next Time

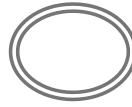


March 19, 2026

- Collaborative process for IEP goal development - shifting away from disciplined specific IEP goals.
 - Data Collection and Outcome measures
 - Goal examples and ideas
- Service delivery models designed to facilitate integrated therapy services and embedded interventions that support meaningful student outcomes.
- Implementing a workload model.



Final Check-In



I can do this!



I'm getting there.



I need help!

