Efficient Evaluations: Ready-to-Use Strategies for Teams
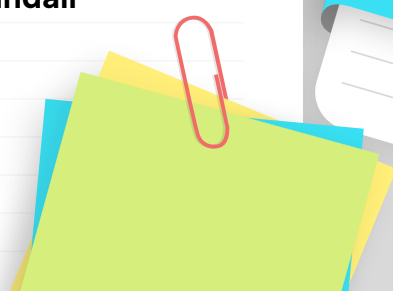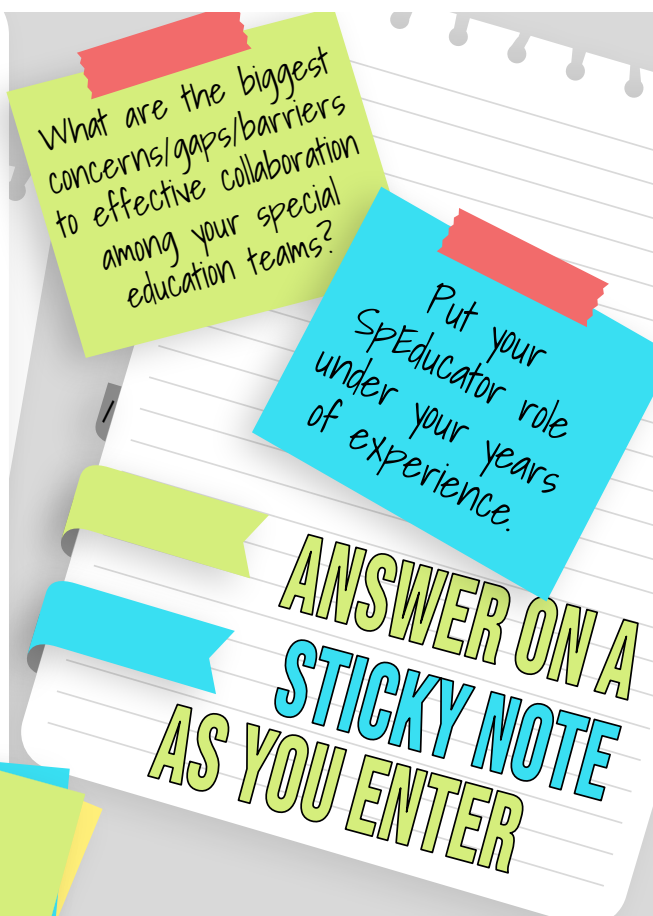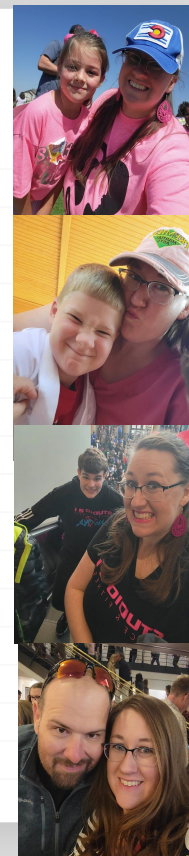
Amanda Evans
Special Education Teacher
Dr. Em Cunningham–Randall
Psy. D. NCSP

What are the biggest concerns/gaps/barriers to effective collaboration among your special education teams?

Put your SpEducator role under your years of experience.

ANSWER ON A STICKY NOTE AS YOU ENTER

Amanda Evans (she/her)

DSST RAPTORS

UNC

Current Roles:
7th Grade SpEducator
GT Coordinator
Special Education
Coordinator/ Admin

amanda.evans@science
andtech.org

SpEducator for 19 years
Advocated and Supported students K–12.
Special Education Coordinator and
Administrator
Bachelors in Special Education
Mom of 3 beautiful kiddos

Dr. Em Psy.D. NCSP
em.cunninghamrandall.psyd@gmail.com

Experience:

2E Affective Needs Liaison
School Psychologist
504/Sped Admin
Evaluation Specialist
DU Neuropsych Extern
Social Worker Coach

Education:
SUNY Oneonta
SUNY Oswego
CU Denver

#JEEPLIFE

Agenda

01
Sped Staffing

02
Problems in Practice

03
REED Document

04
Instant Impact

05
Additional Tools

06
Set Intention

Objectives

Align on common concerns and gaps in everyday practice

Become familiar with collaborative and strategic tools to bring back to your school teams

Collect ideas for implementation within your team or during the next evaluation cycle.

The secret is to gang up on the problem, rather than each other.

– Thomas Stallkamp

Have you ever?

Had to do a last minute assessment for an area of eligibility?

Given the wrong assessment, and had to do a second one?

Had more than one student you were evaluating at a time?

Gone to a meeting with a service provider who "forgot" they needed to assess?

Had not enough observations OR not the correct type of observation for the evaluation meeting?

Sat in a meeting with multiple/ similar developmental histories (psych, nurse, teacher interviewing parent)?

01
Sped Staffing

Special Education Teacher Employment
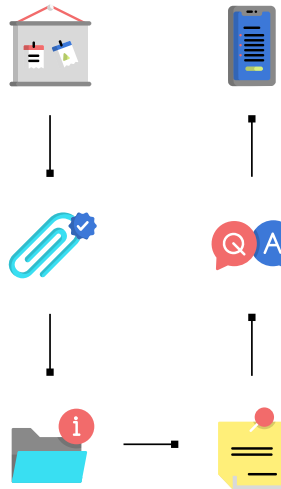
Supply and Demand

For the past 30 years demand has outweighed supply for special education teachers

Limits student access to IDEA

Some can create high quality evals/plans, few can implement these plans

Reasons for Leaving

Retention for a few years then exit. Exit Surveys = poor school culture and climate vs. admin perception of the paperwork

Teacher Prep Programs

Decline in graduation numbers. 2018-2019: 135 graduates for 185 vacant positions

Quality Shortage

Undermines the intent and process behind holding IDEA standards

Poor Working Conditions

In addition, SSP's are in high demand and many now have remote/part-time positions

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Teacher Preparation Programs

CU University of Colorado **Denver**

ASPIRE - Alternative Teacher Licensure

Office of Continuing & Professional Education

We've been helping people become teachers for over 10 years.

1 School Year to Complete

2500 Teachers Licensed*

Including CDE public, private, charter and facility schools.

104 School Districts

Representing 58% of the state's districts.

21 Alternative Licensure Endorsements

196
2017 Teachers

347
2019 Teachers

77% increase from 2017

2022-2023 by Numbers

15%

Percentage of students who receive special education services

DISABILITY	PERCENTAGE OF STUDENTS
Specific learning disability	32%
Speech or language impairment	19%
Other health impairment	15%
Autism	13%
Developmental delay	7%
Intellectual disability	6%
Emotional disturbance	4%
Multiple disabilities	2%
Hearing impairment	1%

7.5 Million

Students receiving special education under IDEA

02

Problems In Practice

Current Challenges

- Looking at only current eligibilities

- The Covid Years

- Evaluations done with no collaboration

- Staying within the MTSS area of concern

Within Elementary Setting

Differing standardized and diagnostic assessments & disability categories

Justifying present results by citing language acquisition or projected gains in independence

Urgency to go from 0-100 with early interventions and MTSS

Within Middle School Setting

Hormones and
Brain Development

Different school structures
between elementary, middle
and high school

Lack of
Interventions/
Interventionists

Within High School Setting

Frustrated Parents
(students struggling
from early on with
little/no supports)

Outside Evaluations
and "prescriptions" for
IEPs/504's from MD's

Inaccurate
previous
re-evaluations
that we're now
building off

03
REED Document

Supports new professionals with guiding questions to consider.

Allows service providers to collaborate

Review of Existing Evaluation Data (REED) Meeting Agenda

Example Student

SCAN ME / SCAN ME / SCAN ME / SCAN ME / SCAN ME / SCAN ME / SCAN ME

05:00
RELAXING

Better Evaluation Collaboration

SSPs Collaboration

- More efficient use of hours SSPs are present
- No one is left out of the conversation

Record Review Specifically for Older Students

- Supports in seeing trends which are missed when only looking at current eligibility.
- Identifying long term concerns in attention, executive functioning, etc.

Emergency/ Provisional Licenses/ Teachers in Alternative Programs

- Guiding Questions to support case managers in exploring all areas of need
- Helps facilitate case managers (often team leads) in running these conversations

Complete Assessments the First Time

- Less last minute assessments
- All areas of need are considered at the start of your 60 days.

Lyanna Evans

7th grade Female Student

Example Student

Example Student

What challenges would a first year provider face in this case?

What would typically happen without a thorough/ collaborative record review?

IEP Record
Review

- Most Recent Evaluation and Eligibility
- Initial Referral

Current Data

- Collaborative
- Inclusive
- Resource for a more exhaustive list of considerations

BEFORE Sending Consent

Already created in our year long calendar

Pre meeting with Parents, Advocates, SSPs before signing consent to align on needs

Reviewed in Weekly team meeting

Case Manager	Prefer. Lang	Annual Due Date	(Re-Eval) Eligibility Due Date	Type of IEP to be held.	Who/What is Tested? Talk w/ service providers before getting consent.	LINK TO REED Document AND SIT Documents AND EVAL TEAM FOLDER EVAL TEAM FORM	SEAS team needed?
Amanda	English	4/2/2026	3/21/2026	RE-EVAL ▾		REED	No ▾
Ari	English	4/27/2026	4/14/2028	ANNUAL ▾			▾
Michael	Amheric	4/14/2026	4/11/2026	RE-EVAL ▾		REED	No ▾

Contact Log, Proposed Eligibilities

FAMILY CONTACT	
Contact the family about the proposed testing above and see if their concerns align with the team's concerns.	
Log contact	

Proposed Eligibilities to Consider BOE Guidelines		▾
	Disability 1	Disability 2
Disability		
Areas required for checklist		
Do you need recent/ new data to support this eligibility?	☐ Yes ☐ No	☐Yes ☐No

Assessment Plan

Assessment Plan		
Data type(Assessment, interview, observations, survey) / Name	Person Responsible	Due Date
OBSERVATIONS- 2 minimum Identify: ☐ BOSS Time on Task ☐ Narrative		
Cognitive--		
Academic		
Communication		
Social/Emotional Health		
Health		
Motor Concerns		

- One place for everyone to reference
- Due Dates and Completion checklists
- Reduce the repetition in the reports.
  - Record Reviews
  - Developmental history
  - Observations

04

Instant Impact

Parent Impact

Meaningful parent involvement from the beginning of the evaluation process

- Builds trust when there are difficult decisions later on

Makes parent inclusion easier – they aren't having to repeat historical information and ongoing concerns

Parents report higher satisfaction with decisions and the special education process

Team Impact

- Supported the team with collecting clear data to support the conversation of SLD vs. OHI or OHI vs. SED
- Better use of all providers time
- Higher performing team and collaboration

Student Impact

Correctly Identifying Students

- Identified 2 students with ID
- Reducing the number of students with SLD and OHI
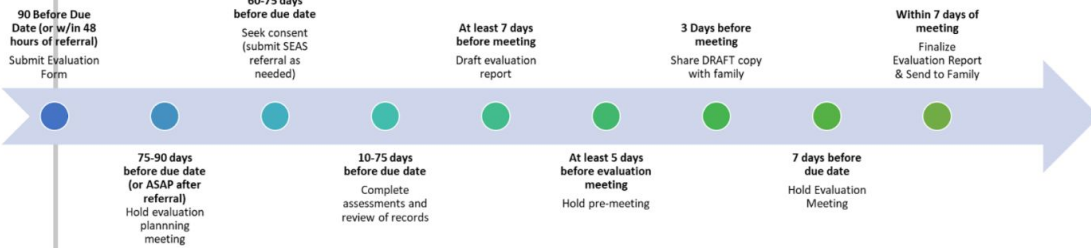- Network wide – increasing correct identifications for students

Quality IEPs and Services

- Identify specific areas of need
- Collaboratively written IEPs given a well rounded support to students
- Supported new to SPED staff

05

Additional Tools

Initial & Re-Evaluation Planning

90 Before Due Date (or w/in 48 hours of referral)
Submit Evaluation Form

60-75 days before due date
Seek consent (submit SEAS referral as needed)

At least 7 days before meeting
Draft evaluation report

3 Days before meeting
Share DRAFT copy with family

Within 7 days of meeting
Finalize Evaluation Report & Send to Family

75-90 days before due date (or ASAP after referral)
Hold evaluation plannning meeting

10-75 days before due date
Complete assessments and review of records

At least 5 days before evaluation meeting
Hold pre-meeting

7 days before due date
Hold Evaluation Meeting

Student Name	Grade Level	Type of Evaluation	SpEd Case Manager	Evaluation Specialist	Primary Disability and Dates	Notes/Comments
		▼				
		▼				

Mental Health Evaluation Checklist

Name: _____   Date: _____

Activities	Components

*indicates may be done by mental health or sped teacher

Record Review
- Review previous evaluation/eligibility determinations*
- Attendance records and patters*
- Discipline history and behavioral patterns*
- Review previous health/developmental histories
- Social/Emot. progress monitoring historical data/intervention records
- Read previous report cards/academic records*
- Previous English language proficiency status and assessments*

Parent or Guardian Input
- Update developmental and educational history interview
  - Ask about current home behavior and adaptive functioning
  - Ask about parent concerns and priorities
- Primary language and cultural consideration are documented
- Behavioral rating scales completed (e.g., BASC-3, Conners, BRIEF
- Adaptive behavior rating scales (e.g. ABAS-3, Vineland-3 (if needed)

Teacher Input
- Current classroom teacher in-person interview
- Academic performance and work samples collected*
- Behavior rating scales completed
- Documented classroom interventions (including IEP accommodations/modifications) and response

Obsevations
- Observations in general education setting (either narrative or time on task observations)
- Observations in additional settings such as social settings (lunch, group work, recess) or structured/unstructured settings which is helpful for ASD evaluations
- Date, duration, setting and activity is recorded in write up for all observations

Common ADHD Rating Scales
- BASC-3 (Behavior Assessment System for Children)
- Conners-4 (short/full)
- Conners CPT (Continuous Performance Test)
- Brown (EF/A) Scales (Executive Function/Attention Scales)
- BRIEF-2 (Behavior Rating Inventory of Executive Function)

Mental Health General Checklist

Example ADHD Evaluation Considerations

Name: _____   Date: _____

Activities	Components
Medical & Health History Documentation	• Current or past medical diagnosis and date of diagnosis documented • Current medications and dosages asked about and listed • Any comorbid medical conditions noted (sleep disorders, autism) • Medication history and response
Standardized Rating Scales	• Parent completed ADHD rating scale • Teacher completed ADHD rating scale • Student self report (if age appropriate) or interview • Scores compared across raters for convergence/divergence • Severity levels documented • Compared with previous (if any) ADHD assessment results
Behavioral & Emotional Functioning	• Broad behavior scale (BASC-3, BRIEF-2) can be helpful for goal planning • Emotional regulation and impulse control documented • Anxiety or mood symptoms are screened • Oppositional or defiant behaviors assessed or documented • Social skills/peer relationships evaluated
Home & Community	• Parent Interview regarding home behavior and functioning • Symptom manifestation in unstructured settings documented • Functioning for household routines/expectations • Organization and time management skills at home • Peer relationships and social functioning outside of school • Sleep, nutrition and self-care routines assessed
Observations	• Classroom observations completed (in academic time and unstructured time where duration and setting is documented) • Attention and impulse control level observed • Peer interactions observed • Response to transitions and changes
Other Considerations	• Are symptoms better explained by another mental health disorder • ASD is ruled out or is co-occuring • Anxiety is assessed and ruled out as a primary factor • SLD is assessed and ruled out as primary factor • Environmental stressors & trauma is considered • Medication and side effects as well as substance use is assessed • Impact on access to general education curriculum is documented • Peer comparision is documented

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Example Autism Evaluation Considerations

Name: _____   Date: _____

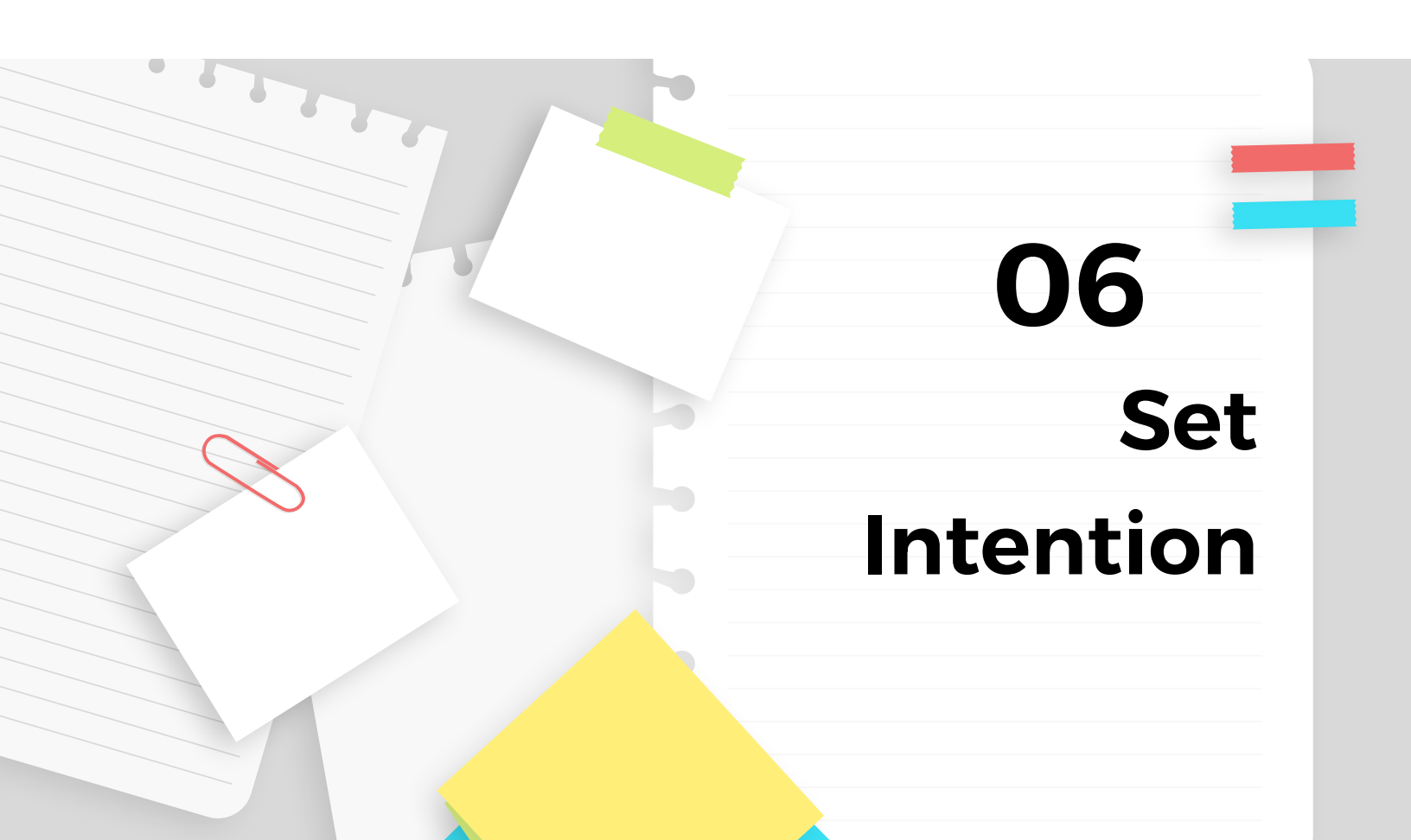| Activities	Components
Developmental and Educational History	• Prenatal, birth and early developmental history collected • Developmental milestones documented (motor, language, social, cognition as well as early childhood and behavioral functioning • School history and grade progression • Previous evaluations or assessments • Previous interventions/response to intervention data • English language proficiency and cultural considerations • Family history of ASD or mental health concerns documented
Standardized Rating Scales	• Parent completed ASD rating scale • Teacher completed ASD rating scale • Student self report (if age appropriate) or interview • Scores compared across raters for convergence/divergence • Severity levels documented • Compared with previous (if any) ASD assessment results • Restricted and repetitive behaviors items reviewed
Behavioral & Emotional Functioning	• Broad behavior scale (BASC-3, BRIEF-2) can be helpful for goal planning • Emotional regulation and impulse control documented • Anxiety or mood symptoms are screened • Oppositional or defiant behaviors assessed or documented • Adaptive functioning in self-care considered • Social skills/peer relationships evaluated • Executive functioninig assessments
Home & Community	• Parent Interview regarding home behavior and functioning • Social communication and interaction at home documented • Restricted and repetitive behaviors at home documented • Organization and time management skills at home • Peer relationships and social functioning outside of school • Sleep, nutrition and self-care routines assessed
Observations	• Classroom observations completed (in academic time and unstructured time where duration and setting is documented) • Social communication and interaction observed • Peer interactions observed • Response to transitions and changes and restricted and repetitive behaviors
Other Considerations	• Are symptoms better explained by another mental health disorder • Sensory profile completed • Impact on learning and behavior is documented • Work closely with SLP and their evaluation • Consider limited English proficiency, environmental, cultural, economic disadvantages • Symptoms present from early childhood and across multiple settings

Dr. Em Cunningham-Randall Psyd

Eval Planning Doc

INITIAL Evaluation Details

Student Name		**Type of Referral** *Parent Requested or MTSS*		**Age**		**Evaluation Due Date**		**Does HO need to be engaged? If yes, who?**	
Case Manager		**Primary Area(s) of Concern**		**Current Grade**		**Evaluation Report Due Date**		**Does APS/DPS need to be engaged?**	
Evaluation Specialist		**Strengths and Weaknesses**		**Date Consent Sent**		**Pre-Meeting Date**		**DPS BOE Guidance**	DPS Guidelines
SpEd Admin		**Does the Bilingual Team need to be involved? If yes, what**		**Date Consent Received**		**Evaluation Meeting Date**		**APS BOE Guidance**	APS Guidelines

Testing & Evaluation Details

Areas of Need	Owner	Evaluation/Assessment Tool	Planned Testing Dates & Times	Testing Status	Evaluation Report Status	Other Notes/Comments
Academic (WIAT, KTEA, Key Math, TOWL, GORT, CTOPP)				▾	▾	
Social-Emotional General (Developmental History, BASC, EDDT, MASC-2 etc.)				▾	▾	
Social-Emotional Attention (CONNERS-4/BRIEF, peer to peer obs)				▾	▾	
Social Emotional Adaptive (Vineland/ABAS)				▾	▾	
Social Emotional Autism (SRS-2, ASRS, peer to peer obs)				▾	▾	
Social Emotional Functional Behavior Assessment				▾	▾	
Cognitive Executive Functioning (BRIEF)				▾	▾	
Cognitve (WISC, KABC, WJ etc.)				▾	▾	
Health (screener, full evaluation as needed)				▾	▾	
Speech & Language/Communication (screeners, full evaluation as needed)				▾	▾	
Occupational Therapy (screeners, full evaluation as needed)				▾	▾	
Physical Therapy (screeners, full evaluation as needed)				▾	▾	
Audiology (screeners, full evaluation as needed)				▾	▾	

Records

Area to Review	Specific Data to Review	Owner	Data Collection Status	Review of Records Report Status	Other Notes/Comments
MTSS Data Summary			▾	▾	
Teacher Interviews			▾	▾	
Parent Input (survey or interview)			▾	▾	
Student Interview			▾	▾ ▾	
Outside/Private Evaluations			▾	▾	
Peer Comparison (Structured Classroom					

Eval Planning Doc

Re-Evaluation Details

Student Name:		**Primary Area of Eligibility:**		**Age**		**Evaluation Due Date**		**Does HO need to be engaged? If yes, who?**	
Case Manager		**Secondary Area(s) of Eligibility**		**Current Grade**		**Evaluation Report Due Date**		**Does APS/DPS need to be engaged?**	
Evaluation Specialist		**New/Updated Considerations?**		**Date Consent Sent**		**Pre-Meeting Date**		**DPS BOE Guidance:**	DPS Guidelines
SpEd Admin		**Does the Bilingual Team need to be involved? If yes, what language?**		**Date Consent Received**		**Evaluation Meeting Date**		**APS BOE Guidance:**	APS Guidelines

Review of Records

Area to Review	Specific Data to Review	Owner	Data Collection Status	Review of Records Report Status	Other Notes/Comments
MTSS Data Summary			▾	▾	
Teacher Interviews			▾	▾	
Parent Input (survey or interview)			▾	▾	
Outside/Private Evaluations			▾	▾	
Peer Comparison (Structured Classroom Observation)			▾	▾	
Assessment Data (iReady, ANet, CMAS, IA/Finals)			▾	▾	
ACCESS Scores & ELD Information			▾	▾	
Work Samples (reading, writing, mathematics)			▾	▾	
Grades (End of Quarter/Semester and trends)			▾	▾	
Attendance Record (IC)			▾	▾	
Behavior Record (IC, LiveSchool & informal)			▾	▾	

Details

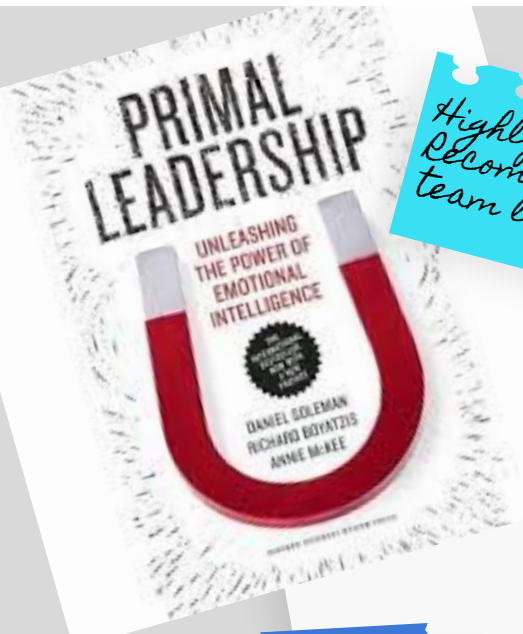| Components	Detailed Step	Owner	Due Date	Status		Role/Title	Name
Meeting Details	Confirm parent/guardian attendance (date and time)			▾		SpEd Teacher/Case Manager	
	Send home Notice of Meeting & Procedural Safeguards			▾		Gen Ed Teacher	
	Confirm team member excusal with family (as needed)			▾		SpEd Administrator/Designee	
	Email calendar invite to FULL IEP team			▾		School Social Worker	
	Reserve Conference room			▾		School Psychologist (as needed)	
Pre-Meeting	Schedule Pre-Meeting (school based team only)			▾		S/L Pathologist (as needed)	
	Email DRAFT copies to family, at least 3 days prior to meeting			▾	**bers**	Occup. Therapist (as needed)	

06
Set
Intention

Honeymoon Effect

We will all leave this conference, reinvigorated to make a change in our school communities.

We will go to schools and quickly are inundated with ALL THE THINGS!

We fall back on our old comfortable ways to get the job done.

Highly Recommend for team leaders!

Not centered in education; however lots about neurology of emotional intelligence.

PRIMAL LEADERSHIP

UNLEASHING THE POWER OF EMOTIONAL INTELLIGENCE

DANIEL GOLEMAN
RICHARD BOYATZIS
ANNE McKEE

The only limit to our realization of tomorrow will be our doubt of today.
—Franklin D. Roosevelt

"It just takes more effort and energy to learn in adulthood lessons that would have come more readily in our early years, because these new lessons fight an uphill battle against the ingrained patterns the brain already has in place. The task is doubled -- we have to undo habits that d not work for us and replace them with new ones that do."

Primal Leadership pg. 104

Motivation

Set an Intention

Take time now to set an intention from this session or other sessions that you are **MOTIVATED** to include into practice.

Take some time to plan what you would like to do continuously when you get back on campus.

05:00
RELAXING

Questions? Comments?

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Amanda Evans
amanda.evans@scienceandtech.org

Resources Links

Google Folder:
- **Presentation**
- **Blank REED Document**
- **Example REED Document**