

Conducting Telephone Conference IEPs

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Abstract

Synchronizing the availability of team members for Individual Education Plan (IEP) meetings can be a daunting task. Fortunately, the Individuals with Disabilities Education Improvement Act of 2004 permits alternative means of conducting such meetings. An example of an alternate means is a telephone conference, whereby parents communicate over the telephone to the rest of the IEP team who remain at school. This article will review advantages and disadvantages to telephone conference IEP meetings as well as provide specific guidelines and suggestions for successful meetings.

Keywords

Individual Education Plan meetings, IEP, telephone conference, alternative means

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Introduction

Individual Education Plan (IEP) meetings are traditionally conducted as face-to-face gatherings of caregivers, school personnel, students, and other concerned individuals. Synchronizing the availability of these busy team members can be a daunting undertaking. In order to accommodate some parents, IEP meetings are occasionally conducted over the telephone. Such meetings are known as telephone conferences (Rogers, 2006). During telephone conference IEP meetings, the parent may be at home or work, while the remainder of the team communicates to them via telephone from school. Not addressed in previous versions of the Individuals with Disabilities Education Act (IDEA), the most current reauthorization of that federal law specifically permits alternate means of conducting IEP meetings if parents and the legal educational agency (e.g., school district) agree to such means (Individuals with Disabilities Education Improvement Act, 2004). Although telephone conference IEP meetings may have been practiced in some regions prior to this most recent reauthorization of IDEIA, there are no published guidelines or research available concerning their use.

The lifestyles of many families today do not always afford opportunities for parents or caregivers to be physically accessible during working hours. Many students come from single parent families, two income families, or extended families with multiple responsibilities (Hill, Yeung, & Duncan, 2000). Participation in face-to-face school activities and meetings can be burdensome. Parents, however, are important members of IEP teams and their desire to participate may be strong. Parents are often acutely aware of their child's medical, social, and educational histories. They have insight into their child's abilities, desires, goals, problems, and fears (Lytle

& Bordin, 2001). Not only can the absence of parents from IEP meetings create a void in information, it can limit their participation in the decision making process. Using telephone conferences as a means of communication can provide an alternative method for families to participate in the IEP process, while building a sense of collaboration.

Telephone conferences have become increasingly popular in recent years and are now an important communication tool in businesses, as well as in medical and educational settings. Telephone conferences are frequently used for presenting information to participants located in diverse geographic areas, for general business or staff meetings, and for interviews. It may take some practice to become proficient at utilizing telephone conferences but once the process has been mastered, they can be an effective and efficient means of communication (Smith, K., 2001).

Technology

Current technology provides a means to accommodate parents with diverse needs. Telephone conferences can be relatively easy to conduct. Specialized equipment is not always necessary. Parents can use a conventional land-based or cell telephone during the meeting while the remainder of the IEP team uses a speaker phone. Speaker phones, which have a microphone and speaker built into the body of the telephone, are readily available. Although they are an economic option, speaker phones tend to have small microphones and speakers that may result in poor transmission and reception.

An alternative to speaker phones are conference phones. These are devices with multiple microphones and speakers that replace or plug into a standard telephone. Conference phones are usually placed in the cen-

ter of a group of participants and have the ability to enhance reception, particularly when more than one person speaks to an individual away from the group.

Along with speaker and conference phones, telephone conferences may be conducted using three-way calling (also known as conference calling). Three-way calls allow for *more* than 2 parties (e.g., mother and father) who are in different places to communicate at the same time. Depending upon the available telephone service, three-way calling may involve operator assistance to establish the needed connections.

To accommodate parents with hearing impairments, a telephone relay service and TeleTYpewriter/Telecommunications Device for the Deaf (TTY/TDD) might be used. A TTY/TDD is an apparatus connected to the telephone, which would allow a parent to type a message to an operator who has a similar device. The operator can then communicate the typed message via voice to the IEP team members at school. The team members at school would orally convey a message to the operator, who then types it into the TTY/TDD. This mediated service would be unnecessary if both parties have access to TTY/TDD devices (Peters & Bell, 2006).

Common Challenges to IEP Meetings

The literature on IEPs reflects upon problems, barriers, and challenges related to traditional face-to-face meetings (Figure 1). Such challenges may persist, may be eliminated, or may be exacerbated with telephone conference IEP meetings. Dabkowski (2004), for example, notes the influence of environment upon parent participation in IEP meetings. Although seemingly innocuous variables, the location of face-to-face meetings (e.g. conference room, storage room, etc.) and the seating arrangements of meetings can im-

part comfort levels of family members, thus affecting the quantity and quality of their participation. These may become irrelevant issues for telephone conference IEP meetings as school personnel would have little control over the location from where parents communicate or sit.

Unfamiliarity with special education and IEP processes, procedures, and terminology are other areas that are cited as being problematic in face-to-face IEP meetings (Lytle & Bordin, 2001; Smith, 2001). When IEP team members are unsure of their roles, the structure of meetings, or with the vocabulary being used, they may become intimidated. Parents and family members, in particular, may not have received preparation for participating in IEP meetings. As a result, they can appear quiet, anxious, or apathetic, which may actually be responses to their attempts to analyze the proceedings. These responses may become more intensified for some family members or caretakers who are unfamiliar or uneasy with IEP meeting protocol because of the nature of telephone communication (e.g., two-person dialogue, shorter utterances, specific task-orientation, exclusive use of verbal and paralinguistic cues) (Ryan, Anas, Hummert, & Laver-Ingram, 1998).

A lack of sensitivity towards language and cultural differences are additional challenges encountered at some traditional IEP meetings (Dabkowski, 2004; Smith, S.W., 2001). Such insensitivities can impede family involvement in the proceedings. When competent translators are not made available or when school personnel fail to thoroughly explain concepts, parents may feel that their participation is unnecessary. Additionally, when school personnel fail to acknowledge culturally related values and behaviors, parents may conclude that they are being treated disrespectfully (Salas, 2004). The characteris-

tics of telephone communication identified above may result in an increased risk for school personnel to be interpreted as insensitive, cold, or rude.

Finally, student attendance and participation is cited as being inadequate at face-to-face IEP meetings (Martin, Marshall, & Sale, 2004). Secondary-grade students are often not prepared for their roles as self-advocates and decision makers. As such, they

may choose to excuse themselves from the proceedings or sit passively in meetings. There is no reason to expect that students would be any more willing to assume their roles and participate during telephone conference IEP meetings unless they have been adequately prepared. Likewise, there is no guarantee that parents would be better team members in telephone conference IEP meetings unless they too were better prepared.

Figure 1. Common Challenges with IEP Meetings

The following are commonly cited problems with IEP meetings:

- Uncomfortable and unattractive surroundings
- Seating arrangements that alienate team members
- Assumed familiarity with special education and IEP policies and procedures
- Excessive use of educational jargon and terminology
- Absence of sensitivity towards language differences
- Deficiencies in student participation
- Cultural incompetency

Advantages

Conducting IEP meetings via telephone conferences can be advantageous (Figure 2). The most obvious advantage is that such meetings allow team members the opportunity to participate without physically being at meetings. Parents may be released from the potential burdens or hardships related to: taking off work, arranging for child-care, accessing transportation, or dealing with other conflicts that may arise. Additionally, time to travel to and from the meetings no longer becomes a contentious factor. Another advantage of telephone conferencing is for parents who are unable to attend meetings due to health concerns or limitations, but who can participate via the telephone. Furthermore, telephone conference IEP meetings may create a “safe haven” for those parents who may not feel comfortable with collaborating in

large groups, but who still desire to participate in decisions regarding their child’s educational needs. Some parents may be more likely to ask questions and to say what they are thinking when participating via telephone conference.

Along with advantages for parents, conducting telephone conference IEP meetings offers some advantages specific to schools. Aside from the cost of phone calls and possible equipment, telephone conferences usually involve minimal expenditures. Additionally, telephone conferences allow school districts to meet timelines that are mandated by laws that govern students with disabilities. Districts would not have to re-schedule meetings and could more easily revise programs and services for students without having face-to-face meetings.

Figure 2. Quotes from Team Members who have Participated in Telephone Conference IEP Meetings

The following are quotes from telephone conference IEP team members:

“Parents seem to like telephone conference IEP meetings. I like them because you don’t have to reschedule meetings. You don’t really meet in person, but you are still able to communicate.” – Marisa Rissling, Resource Specialist Teacher

“I did not have a good experience because many times people would talk at the same time, people would get cut off, and there was no face-to-face contact. When something was misunderstood, it was difficult to clarify over the phone.”
- Mary Jo Vatalare, Vice Principal

“I thought the experience was great. I am a single mother and I feel very uncomfortable with the staff that works with my son. It is difficult sometimes to get off work to attend meetings, so participating by teleconference has allowed me to be a part of my son's IEP meetings without having to take off work.” - Marvis Givens, Parent

Disadvantages

Although there are advantages for both parents and schools, there are also several distinct disadvantages when using telephone conferences for purposes of IEP meetings. Having one or more team members (e.g., mother and father) take part in the meeting away from the group prevents participants from seeing visual cues, body language, and other forms of non-verbal communication that members typically rely upon during face-to-face interactions. This could result in misinterpretations and the inability to establish rapport. Additionally, the absence of visual feedback could cause some participants to feel that such meetings are impersonal, that they encourage passive participation, and lack the full involvement of team members. Technical difficulties (e.g., being disconnected and poor reception) are also potential threats that may impede the progress of meetings.

There are other disadvantages to parents being physically absent from the group during IEP meetings. Telephone conference IEP meetings do not allow parents the oppor-

tunity to review pertinent records, student work samples, or testing protocols during the meetings. Additionally, parents would be unable to officially approve services because they are not at the meeting to sign documents. This may ultimately delay the start of services for students.

Telephone conference IEP meetings, in some instances, might not be the most expedient venue (Figure 3). Meetings that involve repetition and extensive explaining due to language differences or a lack of knowledge may require more time than would face-to-face meetings. Meetings that require a translator, relay services, or keyboarding may also extend the length of IEP meetings when conducted over the telephone. Additionally, meetings that include several guest members to the team, such as those for imminent transitions, can be additionally lengthy via telephone because of introductions, explanations of potential services, and questioning.

Telephone conferences may not provide the degree of accurate and thorough communication that is needed for some IEP

meetings. For example, optimal communication is needed for potentially problematic meetings, such as those which school personnel may refer to as “high profile IEPs.” High profile IEPs usually involve issues that cannot be easily resolved. They may entail very sensitive issues or unique requests. They may be characterized as being lengthy and/or adversarial. They may also involve attorneys or

advocates. High profile IEP meetings are at greater risk for developing into due process hearings. Because of the nature of such meetings, the most favorable forum for precise communication is needed. Face-to-face meetings would increase the chances for accurate communication more than would telephone conference IEP meetings.

Figure 3. Reconsidering the Use of Telephone Conference IEP Meetings

Reconsider the appropriateness of using telephone conference IEPs meetings when:

- Communication is difficult because of language differences (e.g., accent, dialect, hearing impairment).
- Translation/Interpreter services are needed.
- Drastic changes to services will be considered.
- Highly sensitive issues will be discussed.
- Attorneys and/or advocates will be in attendance.
- Unique requests are being made.
- The meeting centers on imminent transition services.
- Conflict and/or hostility is a potential.

Guidelines

Ensuring that telephone conferences run smoothly requires that certain basic protocol or guidelines be followed. Similar to preparing for face-to-face IEP meetings, preparations should be made prior to conducting telephone conferences. School staff should adhere to IEP timelines and should make sure that appropriate documents have been signed and returned before the meeting. If devices such as conference phones are being used, the equipment should be checked for functionality before the meeting. The parent should be contacted prior to the meeting in order to discuss the anticipated procedures and answer any questions concerning how the meeting will be conducted. These seemingly small measures can greatly reduce anxiety associated with the unfamiliar. Special con-

sideration should be made at school to ensure that the meeting is held in a low traffic, quiet area. Additionally, the time should be arranged so that all of the team members can convene before the start of the meeting. Having members trickle in one at a time during the meeting can cause disruption and can affect the flow of the meeting.

To keep the meeting running smoothly, one team member should assume the role of facilitator (Figure 4). An administrator, administrative designee, or case manager is a good choice as someone to act as the meeting facilitator. Their role should begin by performing introductions, stating the purpose of the meeting and requesting that participants follow specific courtesies. Courtesies might include suggesting that cell phones be turned off and that call waiting be temporarily

Figure 4. Facilitator Do's and Don'ts

Telephone Conference IEP Do's

- Carefully consider the starting time
- Prepare members, including students, and distribute agendas before the meeting
- Test equipment prior to the meeting
- Introduce IEP team members and state the purpose of the meeting
- Turn off cell phones and disable call waiting
- Encourage team members to identify themselves when speaking
- Remind team members to speak clearly, one at a time, and to project their voices towards the microphone
- Periodically check for understanding and summarize the proceedings
- Ask for parent/caregiver input throughout the meeting
- Announce when team members leave and formally close the meeting

Telephone Conference Don'ts

- Overlook the importance of preparing in advance
- Fail to recognize language or cultural differences
- Participate in cross conversations or create unnecessary noise
- Use gestures without verbalizing during the meeting
- Use the hold or mute button
- Allow one person to dominate the meeting
- Be remiss in seeking parent/caregiver input throughout the meeting
- Underestimate the sensitivity of certain issues
- End the meeting without closure
- Underestimate the sensitivity of certain issues

disabled or ignored. Team members having a copy of the agenda prior to the onset of the meeting will assist in keeping the meeting organized and progressing in a timely fashion. This may require mailing agendas out ahead of time.

During the proceedings, the facilitator should ask team members to speak clearly, identify themselves each time they speak, and direct their voices towards the receiver. Cross conversations in the background should be avoided, as should shuffling papers, scraping

chairs, tapping pencils, and other distractions, in order for all team members to hear the proceedings. Reactions that are generally expressed physically (e.g., pointing, smiling, etc.) will need to be expressed verbally. In other words, statements such as “I agree,” should be used rather than nodding of the head. Additionally, quiet moments used for writing information should be identified (e.g., “I am taking a moment to write this down.”). As extended lulls in communication need to be avoided, consideration should be given to assigning a team member the role of back-up facilitator. This individual’s job would entail maintaining the team’s communication should the facilitator need to concentrate on documents and other paperwork. In addition, the meeting should not be interrupted if a member needs to leave early, but a convenient break in the conversation should be used to announce the exit.

In order to ensure understanding, the facilitator may want to make a concerted effort to periodically repeat or summarize what was said during the meeting. Participants should be encouraged to use team members’ names when addressing each other. Parents should be asked for their input several times throughout the meeting. Upon conclusion of the necessary business, the meeting should be formally closed by thanking each team member and stating when paperwork can be expected to be received.

Tape Recorded Meetings

It is not unusual for parents or schools to tape record IEP meetings, however, guidelines for such recordings are a regional issue (Figure 5). States or school districts may have their own specific policies (CSEPAC, 2006). To compound the issue of tape recording IEP meetings, there may be state statutes regarding recording of telephone conversations.

Twelve states (See figure 3) require that all parties in a telephone conversation have knowledge and give consent to being tape recorded (Thomas, 2006). If parents or school personnel wish to have the proceeding tape recorded, they should notify other team members before the meeting to determine the appropriate notification and procedures. In spite of legal policies and procedures, there is always the chance that a telephone conference IEP meeting could be covertly recorded. Consequently, team members should be especially vigilant to participate in a prepared and professional manner.

Final Thoughts

Individual Education Plan (IEP) meetings are an integral component to special education. IEP meetings prompt family members, school personnel, students, and other concerned individuals to communicate and to collaborate (Armenta & Beckers, 2006). IEP meetings are also seen as an assurance of parent participation in this most important venue for educational planning and decision making (Dabkowski, 2004). The absence of team

Figure 5. States that Require Consent of all Participants to Record Telephone Conversations

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- Consent required in:*
- California
 - Connecticut
 - Delaware
 - Florida
 - Illinois
 - Maryland
 - Massachusetts
 - Michigan
 - Montana
 - New Hampshire
 - Pennsylvania
 - Washington

members, particularly parents, from meetings can seriously hamper the development of appropriate programming for students. As such, schools have had to become creative in ensuring participation. One way in which schools have addressed this issue is by holding IEP meetings via telephone conferences.

Telephone conference IEP meetings are not without their problems. They are most likely inappropriate for meetings that pertain to truly critical issues, meetings concerning

unique requests, meetings that may involve communication difficulties, and meetings that include guest members. Telephone conference IEP meetings do, however, allow parents an alternative means to participate and to share their observations, impressions, and recommendations about their child. In order for telephone conference IEP meetings to be successful there must be forethought, planning, and sensitivity in organizing and conducting them.

Figure 6. On-line and Hard-Copy Resources about IEPs

On the Web

The National Dissemination Center for Children with Disabilities (NICHCY) is a product of the Academy of Educational Development. The web site includes several IEP related fact sheets, guides, and resources for parents, students, and professionals. www.nichcy.org

U.S. Department of Education developed *A Guide to the Individualized Educational Program* in 2000. The basic information in this document is pertinent to family members and professionals. www.ed.gov/parents/needs/speced/iepguide/index.html

Educational Resources Information Center and the Council for Exceptional Children offer several fact sheets, digests, and resources on IEPs. www.ericec.org/index.html

Attorneys and special education advocates Pete and Pam Wrightslaw sponsor a site with numerous flyers, articles, documents, and links concerning IEPs and IDEIA 2004. www.wrightslaw.com

Hard Copy

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