

Individualized Education Program (IEP) Form and Digital Platform Landscape Analysis

Executive Report

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Contents

- Executive Summary..... 1
 - Key Findings 1
- Key Considerations 2
- Introduction 3
- Methodology..... 4
 - Data Sources 4
- Findings 9
 - Website Search and Analysis Results..... 9
 - Vendor Outreach Results 10
 - Sentiment Survey Results 11
 - Nationwide SEA Survey Results 27
 - SEA Staff Interviews and Focus Groups 27
- Key Considerations 35
 - Benefits 35
 - Challenges..... 35
 - Lessons Learned..... 35
- Conclusion..... 36
- Appendix A. Data Tables..... 38
- Appendix B. Sentiment Survey 44
- Appendix C. State Education Agency Interview and Focus Group Protocol..... 50

Exhibits and Tables

Exhibit 1. Sentiment Survey Outreach Channels	7
Exhibit 2. Nationwide SEA Survey Outreach Channels	8
Exhibit 3. Number of States With IEP Forms	9
Exhibit 4. Number of States With IEP Digital Platforms	10
Exhibit 5. Respondent Distribution by Region	11
Exhibit 6. Respondent Roles Distribution	12
Exhibit 7. Agreement With the Development of a Statewide IEP Digital Platform.....	13
Exhibit 8. Agreement by Region on Statewide IEP Digital Platform.....	14
Exhibit 9. Agreement With Statewide IEP Digital Platform by Respondent Role.....	15
Exhibit 10. Agreement Reasons for the Development of a Statewide IEP Digital Platform.....	16
Exhibit 11. Agreement Reasons by Role	17
Exhibit 12. Disagreement Reasons for the Development of a Statewide IEP Digital Platform	20
Exhibit 13. Disagreement Reasons by Role.....	21
Exhibit 14. Alternatives to an IEP Digital Platform	24
Exhibit 15. IEP Digital Platforms Currently Used by Districts.....	26
Exhibit 16. Statewide IEP Practices Across Participating States	27
Table A1. States With IEP Forms or Digital Platforms	38
Table A2. Response Rates per Region.....	40
Table A3. Reported Respondent Roles	41
Table A4. Agreement With the Development of a Statewide IEP Data Platform	41
Table A5. Agreement by Region on Statewide IEP Digital Platform.....	42
Table A6. Agreement With Statewide IEP Digital Platform by Respondent Role.....	43

Executive Summary

In 2024, the Texas Education Agency (TEA) contracted with the American Institute for Research® (AIR®) to conduct a comprehensive landscape analysis of individualized education program (IEP) forms and digital platforms and how they are used across the United States. For this purpose, AIR conducted a study aimed at examining how other states manage their IEP forms and digital platforms, including state-adopted forms and platforms, state-negotiated vendor contracts, and minimum standards for locally procured IEP platforms. Between October and December of 2024, the study team examined state education agency (SEA) websites, collected stakeholder feedback through surveys, contacted IEP digital platform vendors, and engaged in interviews and focus groups with SEA staff. Findings from this study may be used for evaluating the feasibility and benefits of developing a statewide IEP digital platform to improve efficiency, reduce costs, and ensure compliance across all Texas school districts.

This report provides a summary of the findings from the study, including insights into how other states implement and manage IEP forms and digital platforms. It highlights key takeaways from stakeholder feedback, vendor information, and interviews and focus groups with SEA staff. The report outlines the potential advantages and challenges of a statewide IEP digital platform for Texas.

Key Findings

Overall, data from SEA websites, responses from the sentiment survey, vendor outreach, and surveys and interviews with SEA staff revealed key insights about the current landscape of IEP forms and digital platforms across the country and stakeholder perspectives in Texas. Key findings include the following:

- **Nationwide overview:** AIR identified 44 states with state-adopted IEP forms, out of which 18 are mandated and 26 are optional. Twenty states have a state-adopted IEP digital platform, out of which use is mandated in 8 states and use is optional in the remaining 12 states.
- **Texas stakeholder sentiment survey results regarding a statewide IEP digital platform:** Out of 5,866 respondents, 78% expressed support for a statewide IEP digital platform, including 80% of campus-level staff, 79% of parents or guardians of students receiving special education services, 79% of educational service center (ESC) staff, 73% of district-level administration, and 70% of respondents indicated as other roles. The two reasons for support of a statewide IEP digital platform with the largest percentage were “easier transfer of student information between districts” (58%) and “streamlined IEP data management” (47%). The top two reasons for disagreement with a statewide IEP digital platform were

“loss of district control to choose preferred solutions” (10%) and “concerns about platform stability if not managed well” (9%).

Key Considerations

- **Benefits of a statewide IEP digital platform:** Findings suggest that a statewide IEP digital platform offers several key benefits, including improved data management and compliance, support for student mobility, cost savings for districts, enhanced accessibility, and gains in overall efficiency.
- **Challenges of a statewide IEP digital platform:** Key challenges identified include scalability and functionality limitations, district resistance, training and transition burdens, and balancing the need for customization with statewide standardization.
- **Lessons learned from other states:** Insights from other states highlight the importance of phased rollouts, stakeholder engagement, vendor accountability, system adaptability, and adequate staffing and resources for support.

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Introduction

In 2024, the Texas Education Agency (TEA) partnered with the American Institutes for Research® (AIR®) to conduct a landscape analysis of individualized education program (IEP) forms and digital platforms. This initiative stemmed from stakeholder requests for TEA to explore the feasibility of a statewide digital platform across Texas school districts. A statewide IEP digital platform would allow all school districts to use the same IEP form with standardized required content, and the digital, web-based platform would enable easy access for school districts to manage student IEPs. TEA indicates that the need for a detailed analysis has grown as districts across the state either currently manage their own IEPs through individually procured digital platforms or do not have a digital platform, resulting in varying levels of efficiency, compliance, and financial expenditure.

Currently, each district in Texas that has a digital platform independently selected and negotiated with vendors based on local needs, such as the preference of the district in the arrangement of the IEP requirements or the level of detail in the IEP, rather than following standardized guidelines or state-level coordination. Although this approach allows for local customization, it presents challenges in ensuring uniform compliance, cost-effectiveness, ease of use across districts, and streamlined transfer of records for students who move to a different district within Texas. TEA has recognized these disparities and is responding to calls from ESCs, special education directors, and other stakeholders to consider a more centralized solution. Specifically, stakeholders have requested TEA gather information on whether a statewide IEP digital platform could improve efficiency, reduce costs, and enhance compliance across the state.

This study's purpose was to give TEA a clear understanding of how other states manage their IEP forms and digital platforms. The landscape analysis examined whether states have adopted statewide IEPs and/or digital platforms, negotiated vendor rates, or established minimum standards for locally procured platforms. The study also explored stakeholder sentiments regarding the potential benefits and challenges of adopting a statewide digital platform in Texas. The study team surveyed stakeholders (e.g., ESC staff, district-level administrators, campus-level staff, parents or guardians of students receiving special education services) in Texas, state education agency (SEA) staff nationwide, interviewed and conducted focus groups with SEA staff from four states, carried out targeted outreach to vendors via email and phone, and reviewed SEA websites of 49 states to identify and assess their IEP forms and digital platforms.

This report describes the methodologies for collecting data, summarizes findings, offers insights into how states manage their IEP forms and digital platforms, and highlights key considerations for the potential adoption of a statewide IEP digital platform in Texas.

Methodology

In this section, the data sources are summarized and used to inform the landscape analysis and provide actionable insights into the feasibility and potential outcomes of a statewide IEP digital platform in Texas.

Data Sources

The study used a multimethod approach that involved the following:

- **Website search:** An analysis of 49 SEA websites was conducted to examine the state’s IEP forms and digital platforms.
- **Targeted outreach to IEP digital platform vendors:** Outreach to vendors via email and phone was conducted to assess their contractual relationships with SEAs, assess the extent of their market presence, and gather insights into their role in providing comprehensive digital solutions for IEPs.
- **Surveys:** A sentiment survey (see Appendix B) was developed for and administered to stakeholders in Texas (e.g., ESC staff, district-level administrators, campus-level staff, parents or guardians of students receiving special education) to assess the perceived potential benefits and challenges of adopting a statewide IEP digital platform. Additionally, a nationwide SEA survey (see Appendix C) was developed and administered to gather information from SEA staff across the country about the IEP forms and digital platform used in their states.
- **Interviews and focus groups:** Ten SEA staff from four states participated in interviews and focus groups designed to better understand their experiences, barriers, and strategies for effective implementation with mandatory and optional IEP forms and digital platforms. A copy of the interview and focus group protocols is available in Appendix D.

Website Search and Analysis

To identify states that are using mandated or optional IEP forms and digital platforms, the study team reviewed 49 SEA websites across the United States. This process was designed to capture detailed information on the use of digital IEP platforms and whether states provide standardized IEP forms for district use.

Process and Documentation. The study team followed a systematic approach to ensure thorough and consistent data collection. The team reviewed each SEA website at least twice to verify the information's accuracy and completeness. The team focused primarily on sections of the websites related to special education and used targeted web searches with phrases such as "[state name] IEP form" or "[state name] IEP digital platform" to locate relevant content. After locating the SEA web page pertaining to the state's IEP form or digital platform, the team looked for descriptors such as "optional, approved, mandated, or required" to determine which code to utilize. When information was not readily available, the team conducted additional web searches and explored deeper layers of SEA websites to identify any potential references to IEP forms or digital platforms.

To document the findings, the team used an Airtable database, which was structured to track and organize the data collected for each state. This database served as a central repository for storing key information about the use of digital platforms and the availability of IEP forms, allowing for efficient tracking and comparison of variables across all states. For states where specific information could not be easily found, the team conducted follow-up searches to fill in missing data elements and ensure the dataset was as complete as possible.

Variables. To understand how other states manage IEP forms and digital platforms, and to determine whether a mandated or optional approach was more common, the study team gathered two key types of information:

1. **IEP forms:** The team assessed whether each state currently provides a standardized IEP form and whether it is mandated or optional for district use. The team used the following codes:
 - a. **Mandated:** This applies if the state explicitly requires all districts to use the form.
 - b. **Optional:** This applies if the information specifies that the form is not mandated or when it describes the form as "approved" or "optional."
 - c. **None:** This applies when the website did not have information about an IEP form.
2. **IEP digital platforms:** The team also examined whether states currently offer access to an IEP digital platform and whether it is mandated or optional. The team used the following codes:
 - a. **Mandated:** This applies if the state explicitly requires all districts to use a specific IEP digital platform.
 - b. **Optional:** This applies if the information specifies that the platform is not mandated or when it describes the form as "approved" or "optional."

- c. **None:** This applies when the website did not have information about an IEP digital platform.

Vendor Outreach

To identify which major IEP vendors had executed contracts with states, the study team conducted targeted outreach to 11 key vendors (i.e., PowerSchool, IEPWriter, Frontline Special Education Management, EasyIEP or EdPlan, Special Education Information System, AbleSpace, SpedTrack, empower IEP, Embrace, SameGoal, Encore), including four identified by TEA. A “major IEP vendor” was defined as any vendor offering comprehensive digital platforms for managing IEPs and known to have large-scale contracts with multiple school districts or SEAs. The team selected major IEP vendors based on their prominence in the education technology sector, the number of states using their platforms, and their market presence in providing digital IEP solutions.

Process and Documentation. The study team contacted the 11 major IEP vendors to determine if they had state contracts in place for IEP digital platforms. This process began by locating vendor contact information through publicly available sources, such as vendor websites, email listings, and “Contact Us” sections of websites. The team sent initial inquiries via email and asked vendors to confirm whether they had executed contracts with any SEA for IEP digital platforms, assessed the extent of their market presence, and gathered insights into their role in providing comprehensive digital solutions for managing IEPs. When email contact was unsuccessful, the team followed up by calling the vendors directly using publicly posted phone numbers. The research team tracked all outreach activities and responses using an Airtable database, which documented vendor contact details, the status of outreach efforts, and the outcomes of each inquiry.

Sentiment Survey

The study team developed a sentiment survey to gather feedback from stakeholders across the state of Texas about creating a statewide IEP digital platform. The survey was administered online via the Qualtrics platform between September 18 and October 27, 2024.

The survey consisted of multiple-choice, multiple-select, and open-ended questions designed to capture information about the respondents’ roles, regions, opinions on developing a statewide IEP digital platform, their reasons for agreeing or disagreeing with this initiative, their preferences for alternative solutions if a statewide platform is not pursued, and their current use of IEP digital platforms. Appendix B contains the survey instrument.

Outreach and Participant Recruitment. Outreach efforts were designed to reach a broad representation of stakeholders involved in special education services across Texas, including

ESC staff, district leadership, campus-level staff (e.g., teachers, school psychologists, paraprofessionals), parents and families of students with disabilities, and other community members engaged in the special education process (e.g., advocates, university professors).

To maximize participation, the study team created an informational flyer (in English and Spanish) containing a survey link and a QR code, which was distributed through the channels listed in Exhibit 1.

Exhibit 1. Sentiment Survey Outreach Channels

Informational flyers distributed via:
Posts in the private member portal of the Texas SPED Support website for ESC staff to distribute across LEAs in their region
Posts on the SPEDTex website
Posts on multiple TEA and SPEDTex social media platforms
Emails to organizations such as the Texas Council of Administrators of Special Education and other relevant organizations
Webinar for parents hosted by SPEDTex (September 18, 2024)
Announcement in the TEA Special Education Newsletter (September 24, 2024)
Announcement at the ESC Special Education Directors Huddle Up (September 24, 2024)
TEA webinar for LEAs (September 26, 2024)
Announcement at the ESC/LEA Special Education Director Zoom meeting (October 2, 2024)
Presentation to the Texas Continuous Improvement Steering Committee (October 7, 2024)

Nationwide SEA Survey

To gather information on states' policies and practices regarding IEP forms and digital platforms, the study team developed and administered an online survey targeted at state-level special education directors and other SEA staff across 49 states (excluding Texas). The survey, administered electronically via Qualtrics, was open from October 15 to November 15, 2024.

The survey consisted of multiple-select and open-ended questions designed to gather information about each respondent's role, state affiliation, and specific practices regarding the use of IEP forms and digital platforms. The survey asked respondents to indicate whether their state required all districts to use a statewide IEP form or if a model IEP was available for optional use. Additionally, the survey captured information about whether states mandated or provided an optional IEP digital platform and the extent to which states had negotiated statewide rates with IEP digital platform vendors. The survey also asked respondents if their state had developed minimum standards for IEP digital platforms that districts could use to

evaluate vendors. Finally, the survey invited respondents to provide their contact information for a 45-minute follow-up interview.

Outreach and Participant Recruitment. The study team used a multipronged targeted outreach strategy to ensure that key decision makers and experts from SEAs across the country were represented in the findings. Exhibit 2 lists the outreach channels used.

Exhibit 2. Nationwide SEA Survey Outreach Channels

A survey announcement containing a survey link and a QR code was sent to the National Association of State Directors of Special Education (NASDE) for distribution.

AIR staff with established connections to SEA special education directors and other staff conducted personalized outreach to encourage participation and shared the survey link.

The study team emailed SEA staff listed as the contacts for IEP forms or IEP digital platforms on SEA websites to ensure relevant stakeholders were informed about the survey and had the survey link.

SEA Staff Interviews

The study team conducted four interviews with SEA staff via Zoom to learn about mandatory and optional IEP digital platforms in greater depth. Each interview or focus group lasted approximately 45 minutes, and all sessions were recorded to ensure accurate notetaking. These sessions gathered insights into the potential benefits and consequences as well as lessons learned from implementing at the state level. Participants shared their experiences with IEP digital platforms, discussed implementation processes and digital platform effectiveness, and noted challenges faced and strategies used to overcome identified challenges. The interview protocol, with specific questions, is provided in Appendix D.

Outreach and Participant Recruitment. To recruit participants, a question was included in the nationwide SEA survey asking if respondents would be willing to participate in a follow-up interview lasting up to 45 minutes. Staff from 11 states expressed interest in participating. Six states that had IEP digital platforms were contacted to set up interviews and 4 of the states responded back with availability. The study team contacted these individuals via email to schedule the interviews and encouraged individuals to invite other relevant SEA staff members to join and provide their perspective.

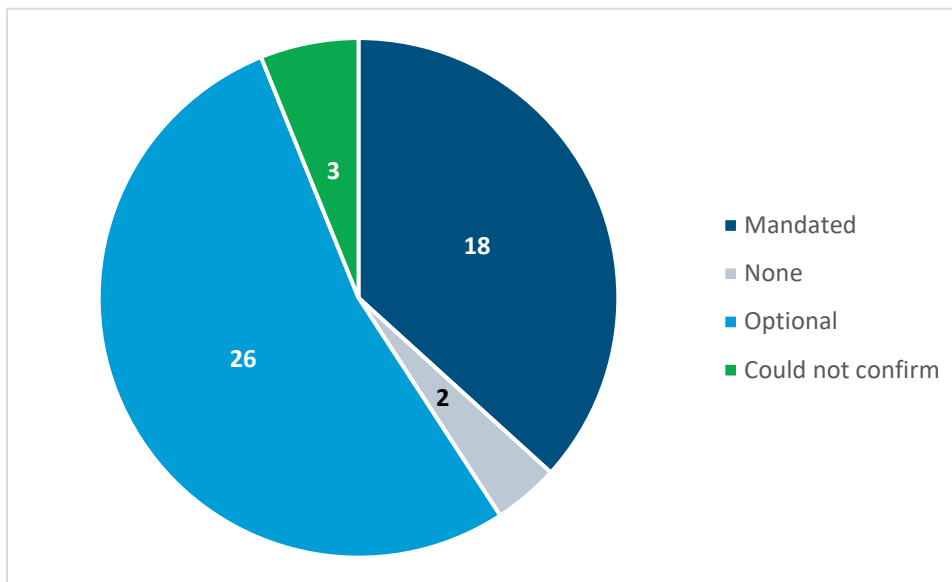
Findings

Website Search and Analysis Results

This section summarizes findings from the review of 49 states' websites to determine whether the state mandates or offers optional standardized IEP forms and digital platforms for districts. Table A1 (in Appendix A) lists the states that mandate or offer optional forms and digital platforms or indicated in the nationwide SEA survey that neither of those is true for their state. This table also includes information that was corroborated by states that completed the nationwide SEA survey. States where information could not be found on their website and did not fill out the nationwide SEA survey to provide information are displayed as "Could not confirm."

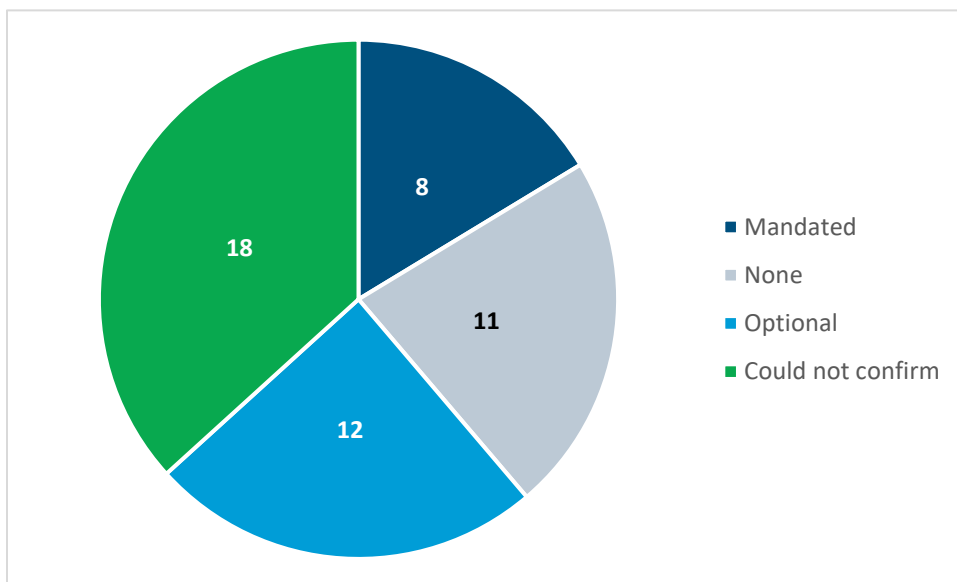
As displayed in Exhibit 3, over half of the states (53%, $n = 26$) offer an optional standardized IEP form. More than one third of the states (37%, $n = 18$) mandate a standardized IEP form for district use. For two states (4%), it was confirmed through the nationwide SEA survey that they do not have an optional or mandated IEP form. For three states (6%), the information could not be confirmed because there was no information on the website about an IEP form and they did not complete the nationwide SEA survey to provide information. These data indicate that although over half of the states offer a standardized form as an option, a notable portion require it.

Exhibit 3. Number of States With IEP Forms



As depicted in Exhibit 4, about a quarter of the states (24%, $n = 12$), offer an optional digital platform for districts, and a few states (16%, $n = 8$) mandate the use of one. Eleven states (22%) confirmed through the nationwide SEA survey that they did not have a digital platform. The remaining 18 states (37%) did not have any information on their website about a digital platform and they did not complete the nationwide SEA survey to provide information. These data suggest that most states either lack a standardized IEP digital platform or have not made relevant information available on their websites.

Exhibit 4. Number of States With IEP Digital Platforms



Vendor Outreach Results

Outreach efforts resulted in responses from eight vendors, with only one—EdPlan—confirming a contract with a state agency. All others indicate contracts with individual districts. Following is a summary of key details about each of these eight vendors.

- **Ed Plan** holds contracts with the Tennessee and NYC Departments of Education for IEPs and provides Medicaid services in New Jersey.
- **IEPWriter** serves Pennsylvania with a web-based solution and is developing a version for California, working directly with districts rather than state agencies.
- **Special Education Information System** is exclusive to California districts.
- **AbleSpace** supports over 10,000 teachers and 200,000 students across more than 100 districts, without state contracts but is open to collaboration with TEA.
- **empOWER IEP** is based in Texas and works with around 20 districts or cooperatives without state contracts.

- **Embrace** serves nearly 90% of districts in Utah and Illinois and 150 in Texas, focusing on district partnerships.
- **SameGoal** operates widely in Texas without state contracts.
- **Encore** differs as it is not an IEP platform; instead, it provides a curriculum based on applied behavior analysis.

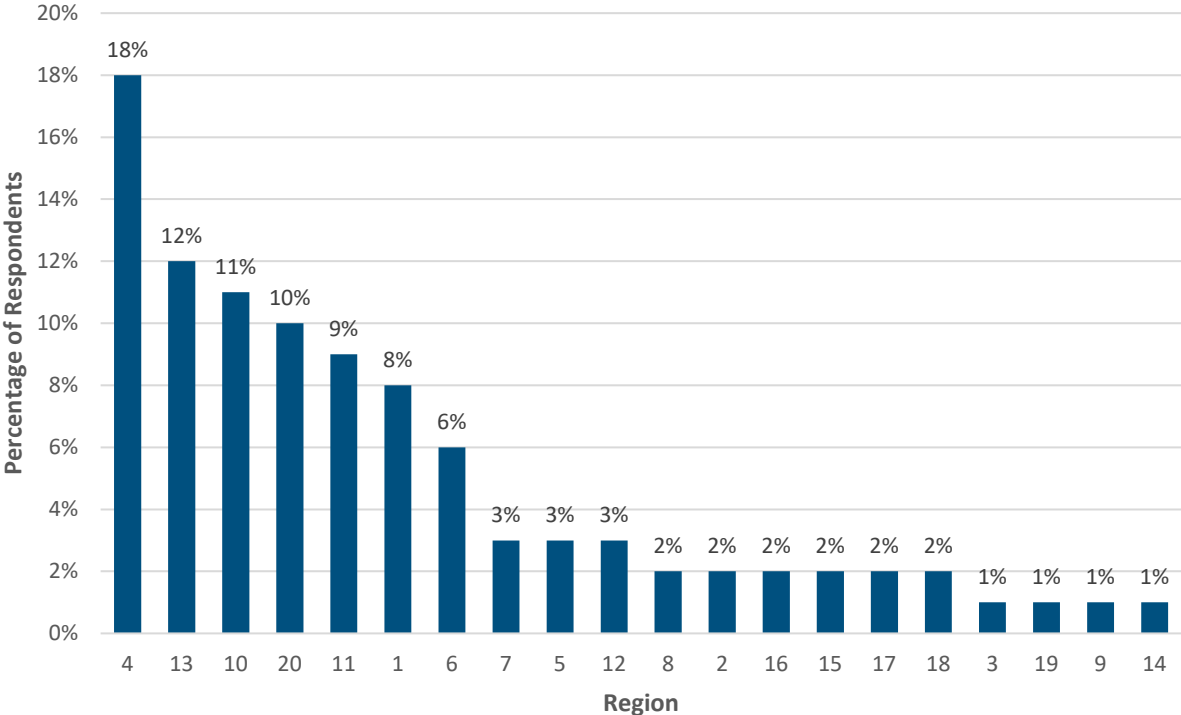
Sentiment Survey Results

A total of 6,242 respondents participated in the sentiment survey, with 5,309 (85%) completing all items in the survey and 933 (15%) partially completing it.

Responses by Region

All but one of the 6,242 respondents specified their region. It is important to have representation across the regions because needs and circumstances vary widely from region to region. As displayed in Exhibit 5 (and Table A2 in Appendix A), Region 4 had the highest representation, with 1,150 respondents (18%), followed by Region 13 with 755 respondents (12%), Region 10 with 693 respondents (11%), Region 20 with 612 respondents (10%), Region 11 with 573 respondents (9%), and Region 1 with 512 respondents (8%). Participation rates in the remaining regions ranged from 6% to 1%.

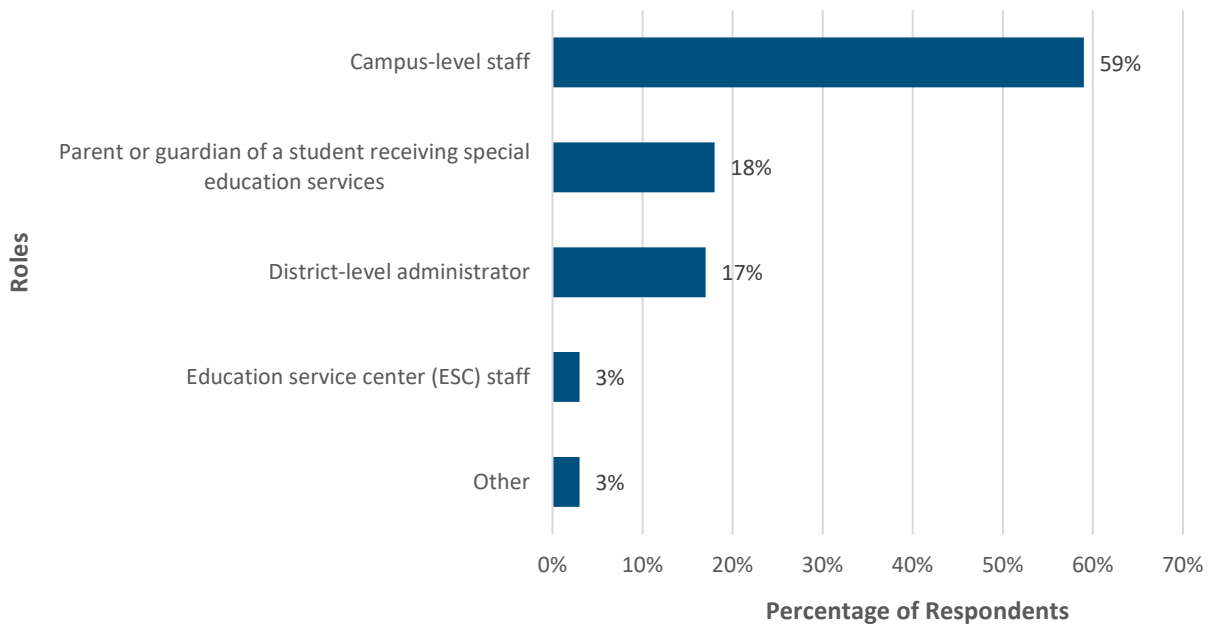
Exhibit 5. Respondent Distribution by Region



Number of Respondents by Role

As shown in Exhibit 6 (and Table A3 in Appendix A), of those who reported their role (6,242 respondents), most identified as campus-level staff (59%, $n = 3,695$), followed by parents or guardians of students receiving special education services (18%, $n = 1,138$), district-level administrators (17%, $n = 1,064$), and ESC staff (3%, $n = 157$). Among those who selected “other” (3%, $n = 188$), roles included advocates, retired educators, school board members, higher education professionals and faculty, consultants, evaluators, and independent contractors.

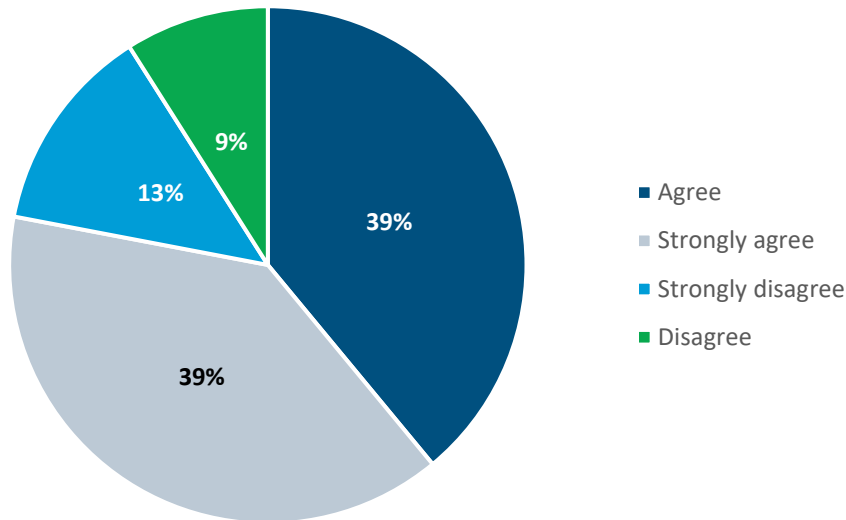
Exhibit 6. Respondent Roles Distribution



Perceptions About the Development of a Statewide IEP Data Platform

Ninety-four percent ($n = 5,866$) of all respondents answered the question about whether a statewide platform should be developed. As displayed in Exhibit 7 (and Table A4 in Appendix A), among respondents who answered this question, 78% indicated support for a statewide platform, with 39% ($n = 2,310$) agreeing and 39% ($n = 2,271$) strongly agreeing. In contrast, 9% ($n = 508$) disagreed and 13% ($n = 777$) strongly disagreed, with a combined 22% indicating opposition. These results suggest that although the majority of respondents favor developing a statewide platform, a notable portion holds reservations about developing and implementing a statewide digital platform.

Exhibit 7. Agreement With the Development of a Statewide IEP Digital Platform



Regional Agreement for Statewide IEP Digital Platform

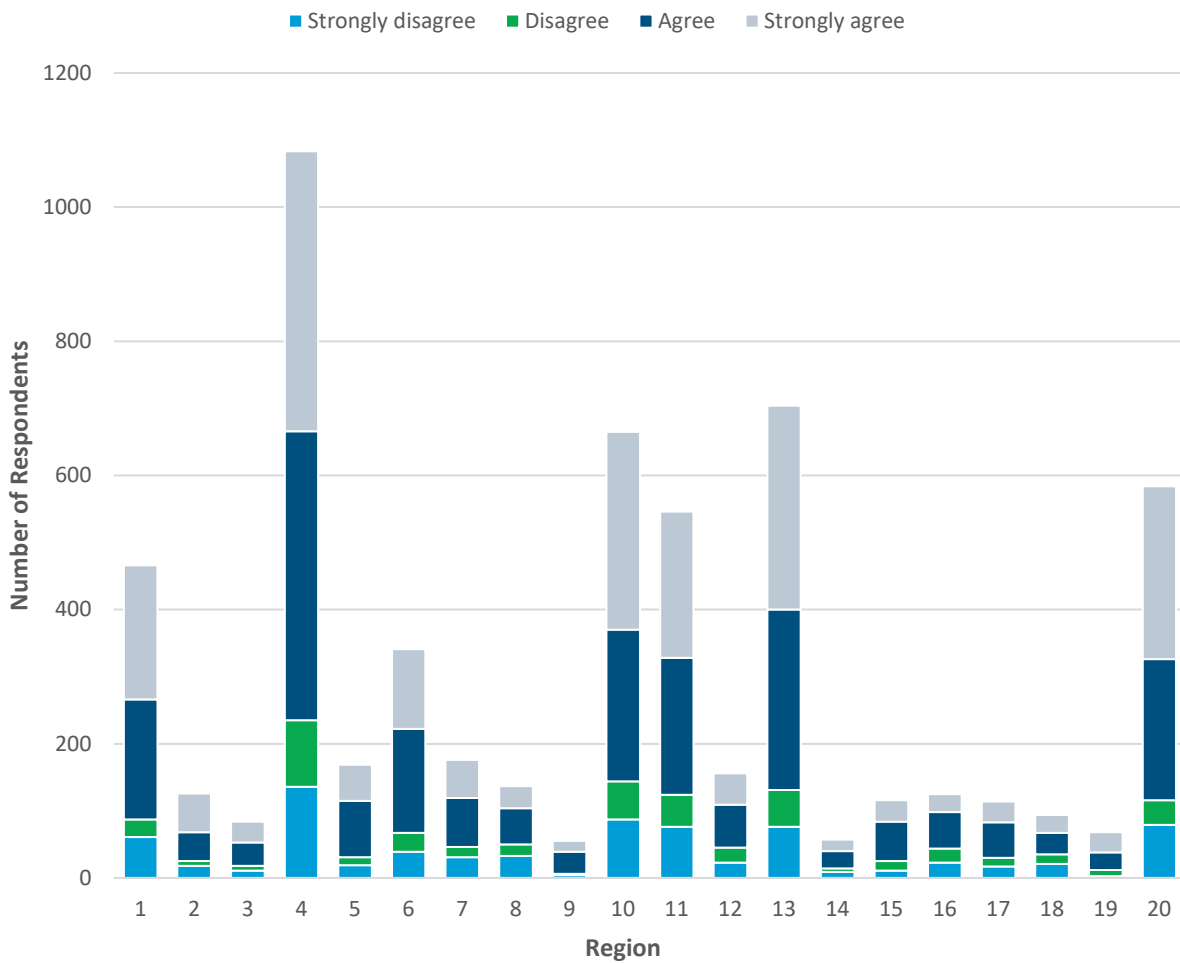
To better understand the data, we disaggregated survey responses by region to assess differences in perspectives regarding the development of a statewide IEP digital platform. As depicted in Exhibit 8 (and Table A5 in Appendix A), survey responses revealed regional variations in support for a statewide IEP digital platform. Region 4, with the highest participation ($n = 1,083$), showed strong support, with the majority (79%) either agreeing or strongly agreeing. Similarly, Regions 1, 10, 11, 13, and 20, which had substantial participation ($n = 466, 665, 546, 704,$ and 584 , respectively), demonstrated comparable levels of support, with over three-quarters (81%, 78%, 77%, 81%, and 80%, respectively) of respondents agreeing or strongly agreeing.

Regions with moderate participation displayed varied perspectives, leaning toward support. Region 6 ($n = 341$) showed 80% agreement, aligning closely with higher participation regions. Region 3 ($n = 84$) and Region 15 ($n = 116$) followed closely, with 79% and 78% agreement, respectively. Region 5 ($n = 169$) and Region 19 ($n = 68$) also indicated high support, with 82% in favor in both regions.

Four of the regions exhibited higher levels of disagreement, with more than 25% of respondents expressing opposition. Region 7 ($n = 176$) indicated 26% disagreement and Region 8 ($n = 137$) had 36% disagreement, suggesting a more divided perspective. Region 16 ($n = 125$) and Region 18 ($n = 94$) also displayed significant levels of disagreement, with 35% and 37% of respondents, respectively, disagreeing or strongly disagreeing. These patterns of disagreement may reflect factors beyond participation rates, such as regional differences in district characteristics, school sizes, or the urban/rural makeup of districts. For instance, regions

serving smaller or rural districts may face unique implementation challenges (e.g., limited internet access or funding constraints). Further research is needed to explore these underlying factors, including local context and district needs, to better understand regional differences and effectively address stakeholder concerns.

Exhibit 8. Agreement by Region on Statewide IEP Digital Platform



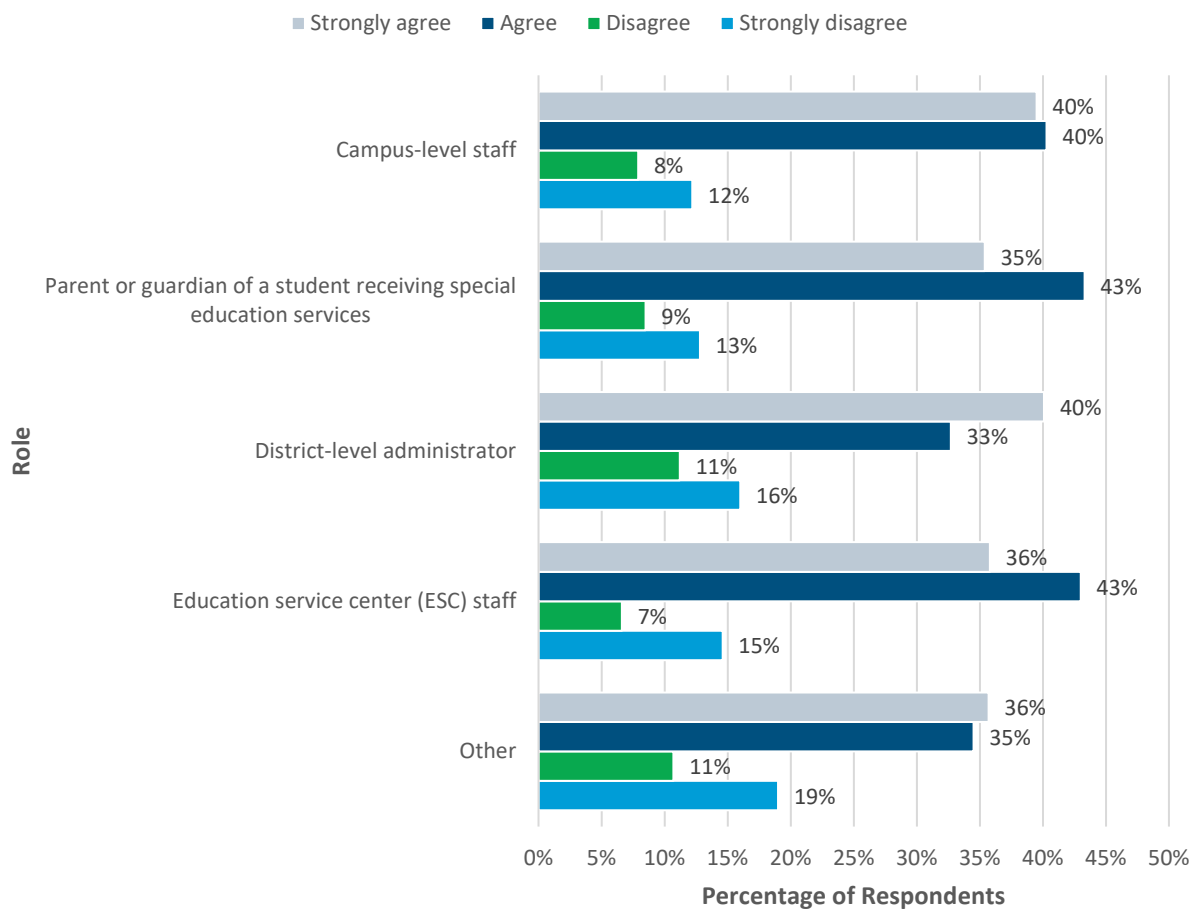
Stakeholders’ Agreement With Statewide IEP Digital Platform

As depicted in Exhibit 9 (and Table A6 in Appendix A), the support for a statewide IEP digital platform showed only slight variation across respondent roles. Campus-level staff, who represented the largest group ($n = 3,495$), indicated strong support, with 80% either agreeing or strongly agreeing with the digital platform’s development. Similarly, parents or guardians of students receiving special education services ($n = 1,019$) and ESC staff ($n = 151$) also expressed high levels of support, with 79% of each group in agreement.

District-level administrators ($n = 1,033$) indicated solid support as well, with 73% either agreeing or strongly agreeing. Respondents in the “other” category ($n = 168$) expressed positive views, with 70% in favor.

Overall, support for the digital platform was high across all roles, with the strongest endorsement from campus-level staff and parents or guardians of special education students. These findings suggest broad-based agreement from key stakeholder groups, with only slight variations in approval levels. However, it is noteworthy that approximately 22% of respondents expressed disagreement with the platform’s development. These results suggest that although the majority of respondents favor developing a statewide IEP digital platform, a notable portion holds reservations about developing and implementing a statewide IEP digital platform. Based on survey data, this group raised concerns about implementation challenges, the loss of local control, or doubts about the platform’s scalability and adaptability.

Exhibit 9. Agreement With Statewide IEP Digital Platform by Respondent Role



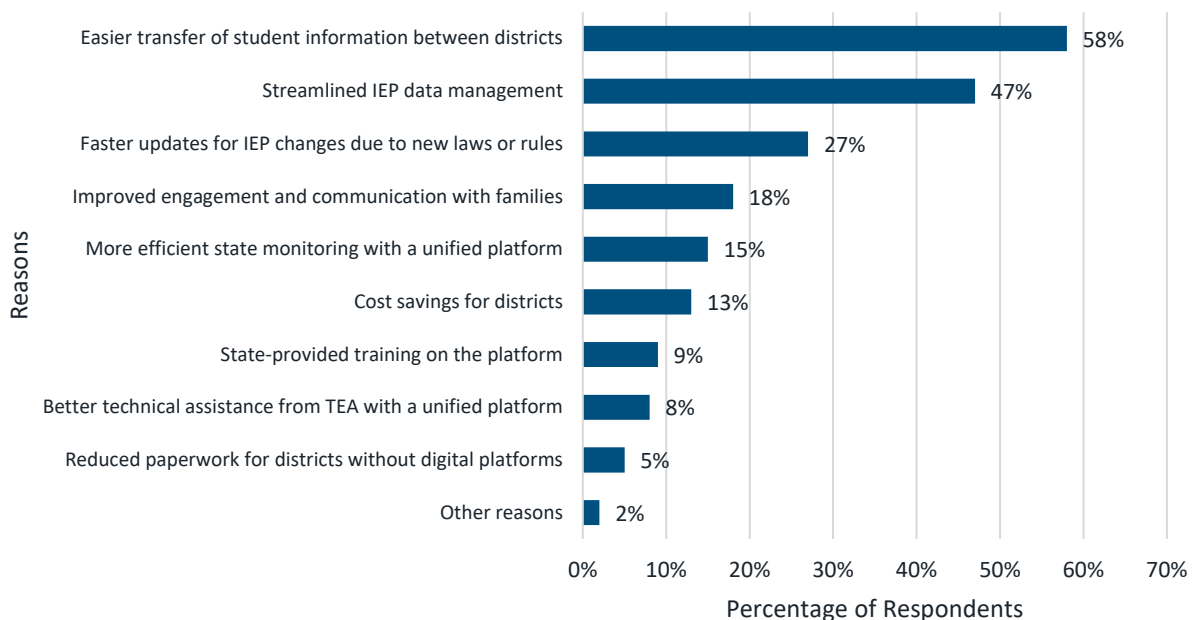
Note. These percentages do not add to 100% because respondents selected their top three reasons.

Reasons for Agreeing With the Development of a Statewide IEP Digital Platform

A total of 4,581 respondents provided insights into their reasons for agreeing with the development of a statewide IEP digital platform. Exhibit 10 displays the reasons cited by these respondents, with the top three focusing on improved processes, ease of access to critical information, and adaptability to regulatory changes. The most common reason (58%, $n = 3,616$) was that a statewide digital platform would make it easier for new districts to receive and understand student information during student transfers. The second most cited reason (47%, $n = 2,959$) was that it would streamline IEP data management (e.g., by simplifying tracking of student progress, compliance monitoring, and report generation) while offering valuable insights for policy alignment with the model IEP. The third most common (27%, $n = 1,696$) was that a statewide platform would enable faster updates when new laws or rules affecting IEP requirements are passed.

Other commonly cited reasons included enhanced engagement and communication with families by providing easier access to IEP information, progress reports, and updates (18%, $n = 1,121$), more efficient state monitoring through a unified statewide platform (15%, $n = 915$), and potential cost savings for districts (13%, $n = 795$). Additional reasons noted by some respondents include state-provided training on the platform (9%, $n = 535$), better technical assistance from TEA with a unified platform (8%, $n = 481$), and reduced paperwork for districts without digital platforms (5%, $n = 318$).

Exhibit 10. Agreement Reasons for the Development of a Statewide IEP Digital Platform

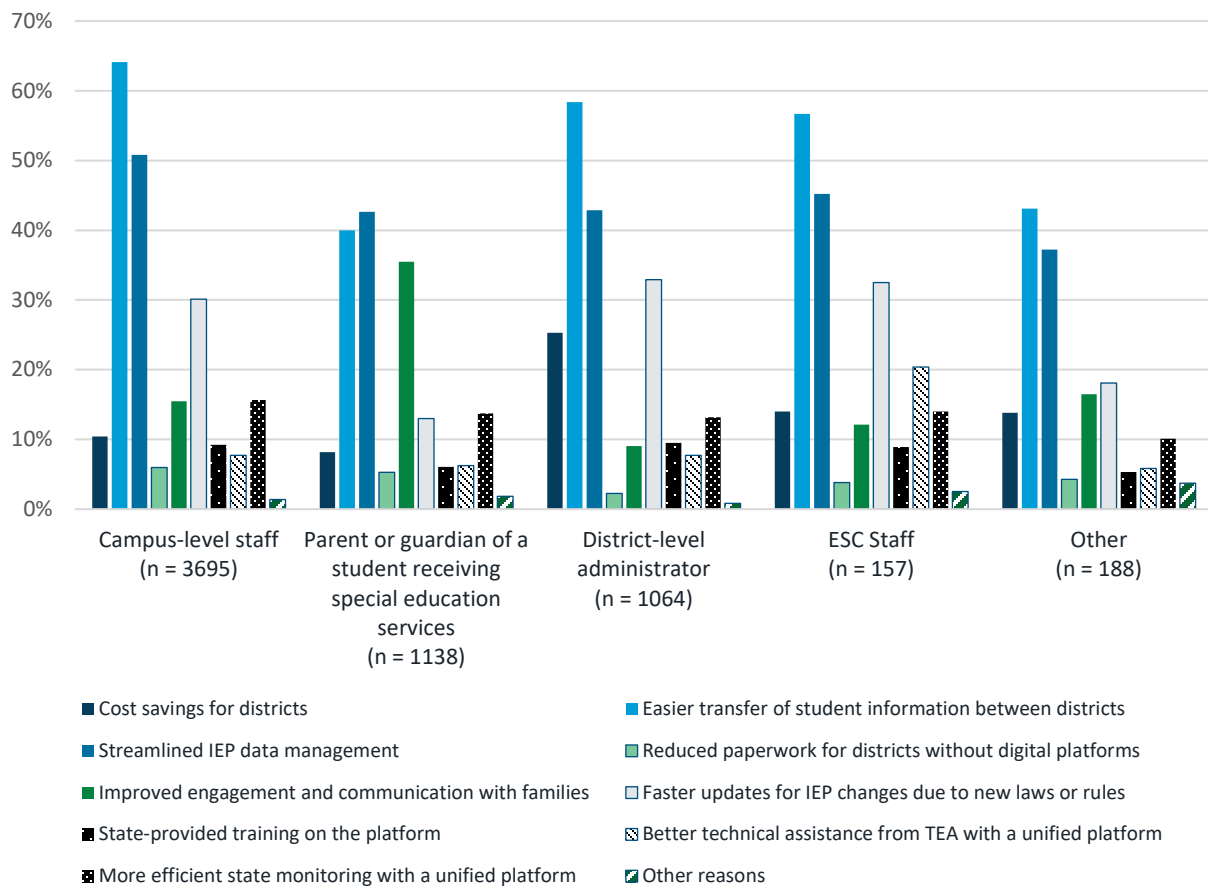


Note. These percentages do not add to 100% because respondents selected their top three reasons.

Agreement Reasons by Role

To better understand the perspectives of different stakeholder groups, we disaggregated the data to examine how agreement reasons varied by role. Exhibit 11 displays reasons cited by various stakeholder groups for their agreement with the implementation of a statewide IEP digital platform. These reasons vary by role, suggesting unique priorities and expected benefits across these groups. For example, district-level administrators rated “cost saving for districts” higher than any other group, whereas parents and guardians rated “improved engagement and communication with families” more than twice as much as any other group. Key areas of agreement focus on improving the transfer of student information between districts, streamlining IEP data management, and enabling faster updates for IEP changes in response to new laws or rules. Together, these priorities suggest a strong interest in enhancing operational efficiency, ensuring compliance, and supporting a smooth transfer of student records and services across districts.

Exhibit 11. Agreement Reasons by Role



Note. Percentages for each role reflect the proportion of respondents who identified themselves within that group.

Campus-level staff's top three reasons for agreeing with a statewide IEP digital platform included the easier transfer of student information between districts (64%, $n = 2,370$), streamlined IEP data management (51%, $n = 1,877$), and faster updates for IEP changes due to new laws or rules (30%, $n = 1,113$). Additional reasons selected by this group were efficient state monitoring with a unified platform (16%, $n = 578$) and improved engagement and communication with families (15%, $n = 571$). Some campus-level staff also cited cost savings for districts (10%, $n = 385$), state-provided training on the platform (9%, $n = 341$), and better technical assistance from TEA (8%, $n = 285$). The least cited reasons were reduced paperwork for districts without digital platforms (6%, $n = 220$) and other reasons (1%, $n = 51$).

Parents or guardians of students receiving special education services identified their top three reasons for agreeing with a statewide IEP platform as streamlined IEP data management (43%, $n = 485$), the easier transfer of student information between districts (40%, $n = 455$), and improved engagement and communication with families (36%, $n = 404$). Additional reasons included more efficient state monitoring with a unified platform (14%, $n = 156$) and faster updates for IEP changes due to new laws or rules (13%, $n = 148$). Some parents also cited cost savings for districts (8%, $n = 93$), state-provided training on the platform (6%, $n = 69$), and better technical assistance from TEA (6%, $n = 71$) as beneficial features. The least frequently cited reasons were reduced paperwork for districts without digital platforms (5%, $n = 60$) and other reasons (2%, $n = 21$).

ESC staff's top three reasons for supporting the implementation of a statewide IEP digital platform were the easier transfer of student information between districts (57%, $n = 89$), streamlined IEP data management (45%, $n = 71$), and faster updates for IEP changes due to new laws or rules (32%, $n = 51$). Additional reasons included better technical assistance from TEA with a unified platform (20%, $n = 32$), cost savings for districts (14%, $n = 22$), more efficient state monitoring with a unified platform (14%, $n = 22$), improved engagement and communication with families (12%, $n = 19$), and state-provided training on the platform (9%, $n = 14$). The least noted reasons among this group were reduced paperwork for districts without digital platforms (4%, $n = 6$) and other reasons (3%, $n = 4$).

Other respondents representing various stakeholder types identified their top three reasons for supporting a statewide IEP digital platform as the easier transfer of student information between districts (43%, $n = 81$), streamlined IEP data management (37%, $n = 70$), and faster updates for IEP changes due to new laws or rules (18%, $n = 34$). Additional reasons included more efficient state monitoring with a unified platform (10%, $n = 19$), improved engagement and communication with families (16%, $n = 31$), cost savings for districts (14%, $n = 26$), better

technical assistance from TEA (6%, $n = 11$), and state-provided training on the platform (5%, $n = 10$). The least frequently cited benefits by this group were reduced paperwork for districts without digital platforms (4%, $n = 8$) and other reasons (4%, $n = 7$).

Overall, these results indicate that key reasons for supporting a statewide IEP digital platform include facilitating the transfer of student information between districts, streamlining IEP data management, and enabling faster updates for IEP changes in response to new laws or rules. These priorities reflect a shared emphasis on improving operational efficiency, compliance, and support for smooth student transitions across districts.

Thematic Analysis of “Other” Reasons for Agreeing With the Development of a Statewide IEP Digital Platform

Eighty-eight of the 92 respondents who selected “other” specified their reasons for agreeing with the statewide digital platform. The following section summarizes the key emergent themes from those comments.

- **Consistency and uniformity** emerged as the primary reason, with respondents emphasizing that a unified digital platform could standardize IEP documentation across Texas ($n = 36$). Some of these respondents ($n = 20$) noted that this standardization would improve clarity for educators and parents, facilitating smoother transitions for students moving between districts. Other respondents highlighted that a consistent approach would reduce misunderstandings and establish a more predictable framework for IEP management statewide ($n = 16$).
- **Efficiency and time savings** was another salient theme, with respondents ($n = 18$) noting that a standardized system could reduce the time educators spend learning different platforms, freeing up more time for instructional planning. Some of these respondents ($n = 12$) also indicated that the potential for reduced onboarding time and minimized disruptions during staff transitions between districts would be beneficial for maintaining educational continuity.
- **Parental and student support** was another emergent theme, with some respondents ($n = 12$) noting that a uniform IEP format would make it easier for parents to understand and engage with their child’s educational plan, fostering greater involvement and support for students’ needs.
- **Compliance and accountability** was another emergent theme among respondents ($n = 10$) who indicated this would be a key outcome of the implementation of a state-managed digital platform. These respondents suggested that such a system could reinforce

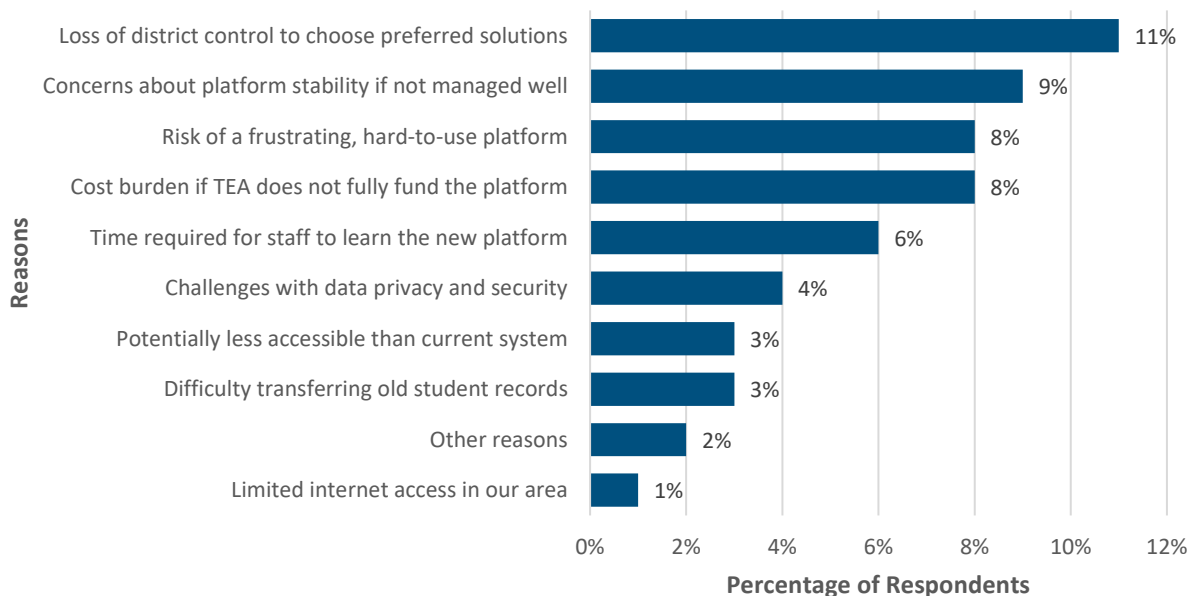
adherence to legal standards and reduce inconsistencies in IEP implementation across districts, promoting a higher level of accountability in delivering special education services.

Reasons for Disagreement With the Development of a Statewide IEP Digital Platform

Exhibits 12 and 13 display the reasons indicated by respondents who disagreed with the development of a statewide IEP digital platform (22%; $n = 1285$), with the top three reasons focused on maintaining local control, ensuring platform stability, and usability. Among these respondents, the most frequently cited reason was the potential loss of district control to choose alternatives that work best for them (11%, $n = 658$). The second most mentioned reason was concern about stability issues if the platform is not managed well (9%, $n = 561$), and the third was the risk of engaging with a difficult-to-use platform (8%, $n = 501$).

Other commonly cited reasons include the potential cost burden if TEA does not fully fund the platform (7%, $n = 480$) and the time required for staff to learn to use the new platform (5%, $n = 351$). Additional reasons, cited by fewer respondents, included challenges with data privacy and security (4%, $n = 219$), potential reduced accessibility compared to current systems (3%, $n = 205$), and difficulty transferring old student records into the new platform (3%, $n = 204$). A smaller number of respondents mentioned limited internet access in their area (1%, $n = 87$).

Exhibit 12. Disagreement Reasons for the Development of a Statewide IEP Digital Platform



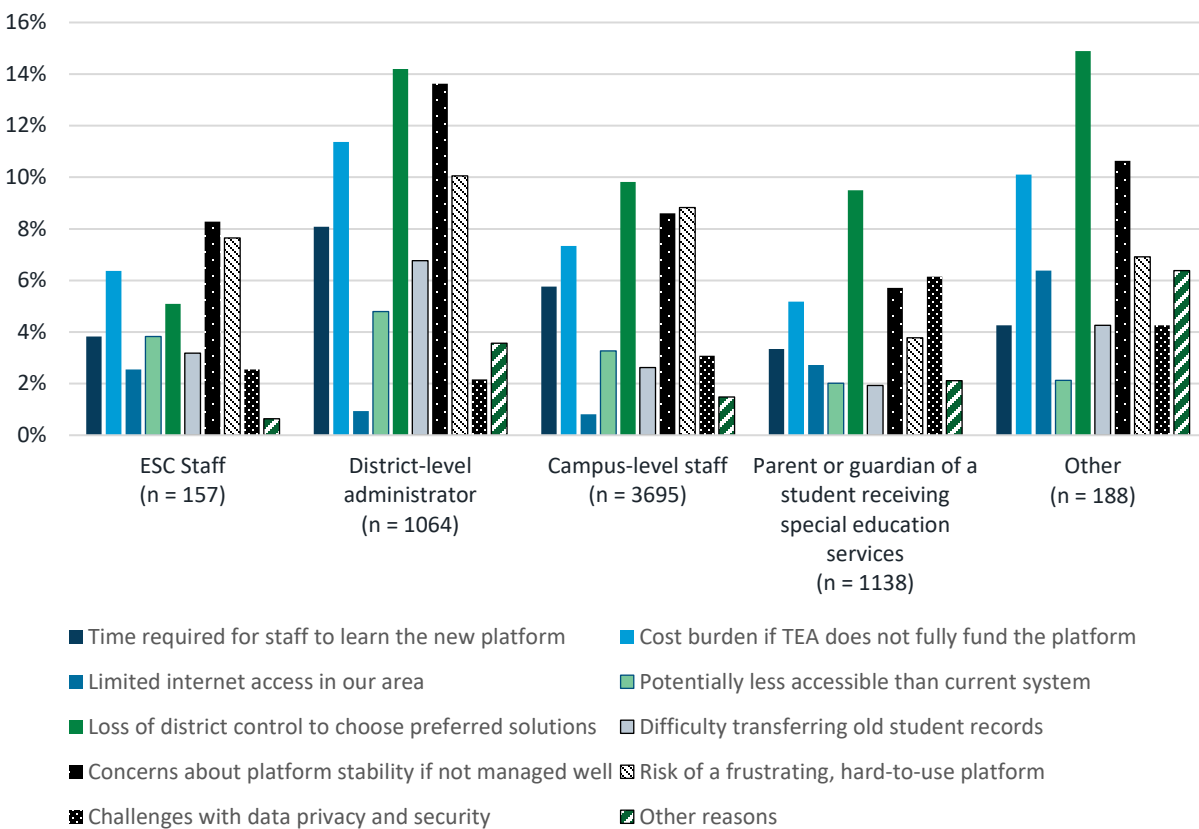
Note. These percentages do not add to 100% because respondents selected their top three reasons.

Disagreement Reasons by Role

Exhibit 13 presents the reasons cited by different stakeholder groups for their disagreement with the implementation of a statewide IEP digital platform. These reasons differed by role, reflecting distinct priorities and concerns across these groups. For example, “potentially less accessible than current system” was the most selected reason for each group except ESC staff.

District-level administrators’ top three reasons for disagreeing with the implementation of a statewide IEP digital platform included concerns about the loss of local control to select solutions that best meet their needs (14%, $n = 151$), platform stability if not managed well (14%, $n = 145$), and potential cost burdens if TEA does not fully fund the platform (11%, $n = 121$). Additional reasons included the risk of a frustrating, hard-to-use platform (10%, $n = 107$) and difficulty in transferring old student records into a new system (7%, $n = 72$). A few administrators also expressed concerns over the time required for staff to learn the new platform (8%, $n = 86$), potential accessibility issues compared to current systems (5%, $n = 51$), and challenges related to data privacy and security (2%, $n = 23$). Limited internet access (1%, $n = 10$) was the least cited concern but still present among some administrators.

Exhibit 13. Disagreement Reasons by Role



Note. Percentages for each role reflect the proportion of respondents who identified themselves within that group.

Campus-level staff's top three reasons for disagreeing with the implementation of a statewide IEP digital platform included concerns about the loss of district control to choose preferred solutions (10%, $n = 363$), the risk of a frustrating, hard-to-use platform (9%, $n = 326$), and platform stability if not managed well (9%, $n = 318$). Additional reasons included potential cost burdens if TEA does not fully fund the platform (7%, $n = 271$) and the time required for staff to learn the new system (6%, $n = 213$). A few campus-level staff also cited potential accessibility limitations compared to current systems (3%, $n = 121$), challenges with data privacy and security (3%, $n = 114$), and difficulty in transferring old student records (3%, $n = 97$). Limited internet access (1%, $n = 30$) was the least cited concern among this group.

Parents or guardians of students receiving special education services identified their top three concerns as the loss of district control (9%, $n = 108$), data privacy and security (6%, $n = 70$), and platform stability if not managed well (6%, $n = 65$). Other reasons included potential cost burdens if TEA does not fully fund the platform (5%, $n = 59$) and the risk of a hard-to-use platform (4%, $n = 43$). A few parents also indicated concerns about potential accessibility limitations compared to current systems (2%, $n = 23$), difficulty in transferring old student records (2%, $n = 22$), time required for staff to learn the platform (3%, $n = 38$), and limited internet access (3%, $n = 31$).

ESC staff's top three reasons for disagreement were platform stability if not managed well (8%, $n = 13$), the risk of a frustrating, hard-to-use platform (8%, $n = 12$), and potential cost burdens if TEA does not fully fund the platform (6%, $n = 10$). Additional reasons included the loss of district control to choose preferred solutions (5%, $n = 8$) and potential accessibility limitations compared to current systems (4%, $n = 6$). A few also cited concerns about the time required for staff to learn to use the new platform (4%, $n = 6$), data privacy and security (3%, $n = 4$), difficulty in transferring old student records (3%, $n = 5$), and limited internet access (3%, $n = 4$).

Other respondents, representing various stakeholder types, cited the loss of district control to choose solutions (15%, $n = 28$), platform stability if not managed well (11%, $n = 20$), and potential cost burden if TEA does not fully fund the platform (10%, $n = 19$) as their top three reasons for disagreement. Additional concerns included the risk of a hard-to-use platform (7%, $n = 13$) and challenges with data privacy and security (4%, $n = 8$). A few also cited the time required for staff to learn the platform (4%, $n = 8$), difficulty in transferring old student records (4%, $n = 8$), potential accessibility limitations (2%, $n = 4$), and limited internet access (6%, $n = 12$).

Across the stakeholder groups who disagreed with a statewide digital platform, results indicate concerns about losing local control, potential issues with platform stability and usability, and challenges related to cost, data privacy, and accessibility. These findings highlight the importance of a platform that proactively addresses diverse operational needs while ensuring reliability, flexibility, and adequate support.

Thematic Analysis of “Other” Reasons for Disagreeing With the Development of a Statewide IEP Digital Platform

Of the 130 (2%) respondents who selected “other,” 125 specified their reasons for disagreeing with the statewide platform. The following are the key emergent themes from their feedback.

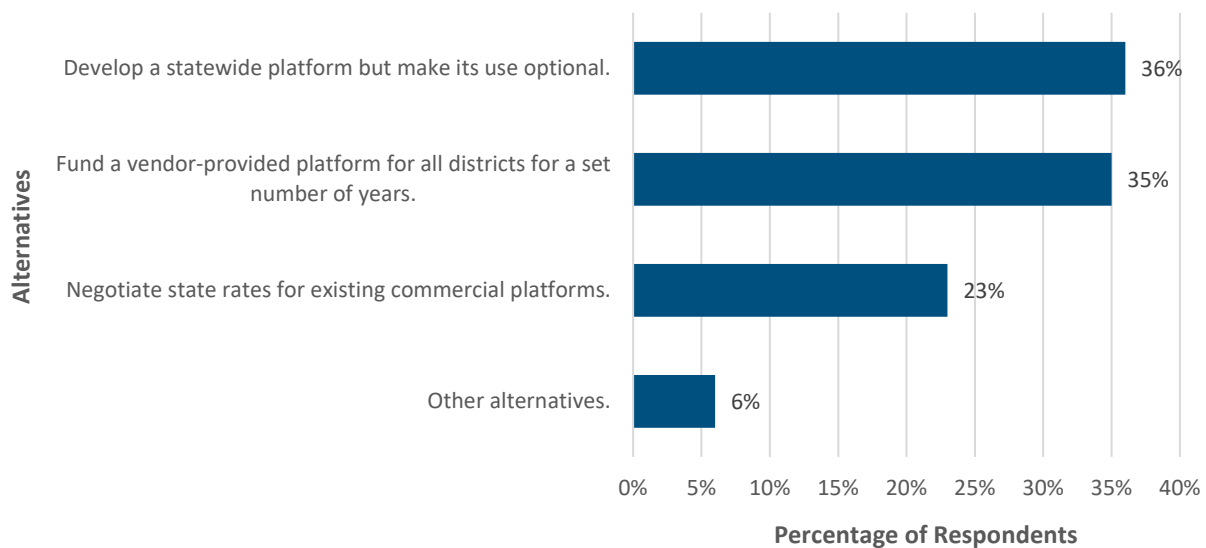
- **Distrust in implementation and management:** A third of these respondents ($n = 42$) expressed doubt in the development and management of an effective statewide platform. Concerns included TEA’s past performance with technology rollouts ($n = 15$), fears of a poorly implemented system ($n = 18$), and doubts about the agency’s commitment to providing ongoing support ($n = 9$).
- **Loss of individualization and flexibility:** Some respondents ($n = 28$) emphasized the need for flexibility to address individual students’ needs and expressed concerns that a standardized digital platform could limit customization. This group highlighted apprehension that a one-size-fits-all approach might not align with the diverse requirements to meet the needs of students and educators.
- **Local control and autonomy:** Many respondents ($n = 34$) cited a strong preference for maintaining local district control over IEP platforms. These respondents noted that local decision making enables districts to choose systems best suited to their unique student populations and administrative needs, and feared a statewide system would erode this autonomy.
- **Concerns about cost and resource allocation:** The cost of developing a new statewide platform emerged as a salient concern for some respondents ($n = 21$). This group questioned the value of investing in a new system, suggesting that funds might be better allocated to direct educational support, such as hiring staff or enhancing current programs.
- **Vendor and platform quality concerns:** Several respondents ($n = 14$) voiced concerns about potential vendor selection processes, specifically citing risks of monopolies and the possibility of contracts being awarded to politically connected entities instead of the most qualified providers. Some ($n = 9$) also highlighted potential issues with the platform’s quality and stability as significant drawbacks.

Alternatives to a Statewide IEP Digital Platform

Exhibit 14 displays respondents' preferred alternatives if the state decides not to implement a statewide IEP digital platform. Of the 5,309 respondents (77 %) who answered this question, over one third (36%, $n = 1,916$) supported developing a statewide platform for optional use. Similarly, over one third (35%, $n = 1,847$) favored the state contracting with a vendor while covering the platform costs for all districts for a set number of years. About one fifth of respondents (23%, $n = 1,217$) indicated a preference for establishing state-negotiated rates for existing for-profit platforms.

These findings indicate that although there is interest in a statewide platform, many respondents value flexibility, either through optional use or vendor-funded options for limited time periods.

Exhibit 14. Alternatives to an IEP Digital Platform



Thematic Analysis of “Other” Alternatives to a Statewide IEP Digital Platform

Of the 329 respondents (5%) who selected “other,” 291 shared insights about the most logical and efficient alternatives to a statewide IEP digital platform. The following are the key emergent themes from their comments.

- **Local control and district autonomy:** Some respondents favored allowing districts to retain control over their IEP systems ($n = 40$). They noted that local districts are best suited to choose systems tailored to their unique needs and student populations, maintaining flexibility and relevance at the district level. A subset of this group ($n = 18$)

voiced concern that centralized control could inhibit local responsiveness and adaptability.

- **Maintain current systems:** Many respondents ($n = 35$) recommended leaving the existing systems in place, suggesting that current platforms already meet their needs or that a new system could disrupt established processes. This group expressed satisfaction with the functionality of existing systems, viewing change as potentially costly or unnecessary.
- **Funding and financial support for district choices:** Several respondents ($n = 25$) proposed that, rather than a unified platform, the state should allocate funds to support districts in covering their own chosen IEP systems. They indicated that direct financial assistance for implementation, updates, and training for existing platforms would be more efficient than mandating a single statewide platform.
- **Platform standardization without a statewide platform:** A few respondents ($n = 15$) advocated for standardized IEP formats or guidelines across platforms rather than a unified system. They suggested requiring all IEP platforms to adhere to specific content and structure standards, allowing for interoperability and consistency without enforcing a single statewide system.
- **Pilot testing and optional statewide platform:** A few respondents ($n = 10$) recommended piloting a statewide platform as an optional tool for districts that choose to use it, thus gathering feedback before a full rollout. They noted that this phased approach could identify potential issues and improvements based on real-world district feedback.

IEP Digital Platforms Currently Used by Districts

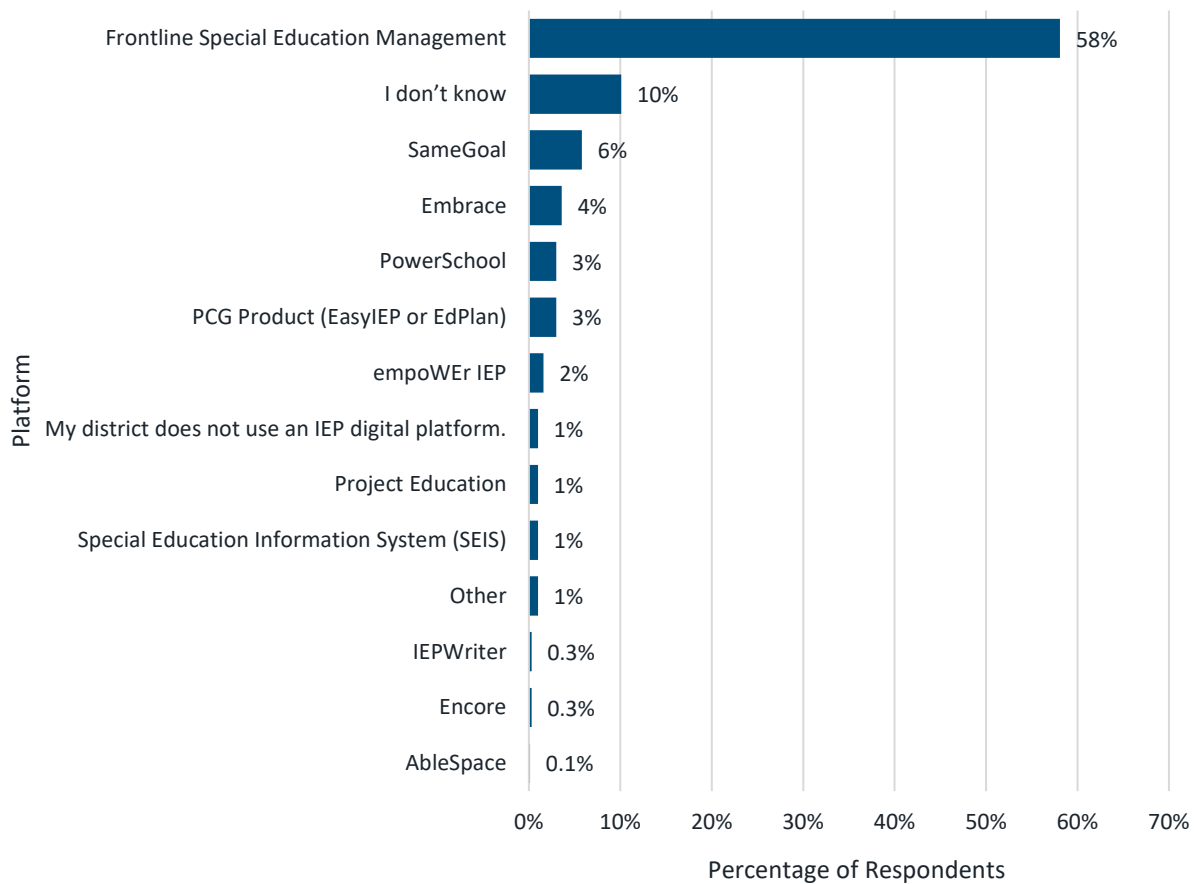
Exhibit 15 shows the IEP digital platforms currently used by districts. Out of 6,242 respondents, more than half (58%, $n = 3,628$) reported using Frontline Special Education Management, making it the most widely used platform. A smaller number of respondents reported using SameGoal (6%, $n = 365$), Embrace (4%, $n = 225$), PowerSchool (3%, $n = 183$), and PCG Product (EasyIEP or EdPlan; 3%, $n = 205$).

Less common platforms included empowER IEP (2%, $n = 101$), Project Education (1%, $n = 90$), and Special Education Information System (1%, $n = 48$). Some respondents (1%, $n = 81$) indicated their district does not use an IEP digital platform, whereas others reported various less frequently used platforms, including IEPWriter (0.3%, $n = 19$), Encore (0.3%, $n = 17$), and AbleSpace (0.1%, $n = 9$).

Among the 52 platforms that were listed under the “other” category, respondents listed SpedTrack ($n = 10$), Goalbook ($n = 9$), Special Education Automation Software ($n = 9$), and Skyward ($n = 6$). Other less frequently listed platforms were Eduphoria ($n = 3$), eStar ($n = 2$), Google Docs ($n = 2$), Review 360 ($n = 2$), Google Forms ($n = 1$), Google Sheets ($n = 1$), eSHARS ($n = 1$), Laserfiche ($n = 1$), Polaris ($n = 1$), Special Education Electronic Data System ($n = 1$), and TReX ($n = 1$). Finally, some respondents (10%, $n = 630$) were unsure of their platform, selecting “I don’t know.”

Overall, these data suggest that Frontline Special Education Management dominates the IEP digital platform landscape among districts in Texas, whereas a narrower set of districts relies on other platforms.

Exhibit 15. IEP Digital Platforms Currently Used by Districts



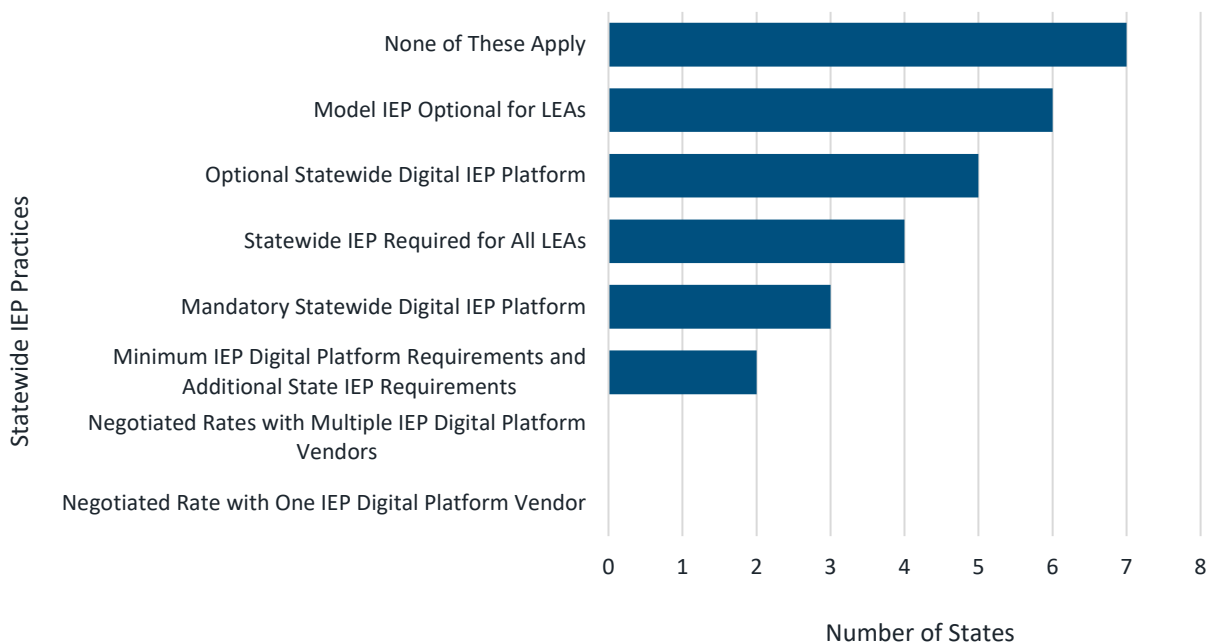
Note. These percentages do not add to 100% because 15% of the respondents did not select any of the options.

Nationwide SEA Survey Results

A total of 21 respondents representing 20 states completed the nationwide SEA survey. Respondents represented various roles, including state director ($n = 10$), assistant director ($n = 2$), deputy superintendent ($n = 1$), bureau leader ($n = 2$), administrator ($n = 1$), consultant ($n = 2$), program manager ($n = 2$), and coordinator ($n = 1$).

As depicted in Exhibit 16, six states offer a model IEP that districts may choose to adopt, and five states provide a statewide digital IEP platform that districts can opt to use. Four states require all districts to use a standardized statewide IEP, and three states require districts to use a statewide digital IEP platform. Only two states have developed minimum requirements for IEP digital platforms, such as compliance with IDEA standards or features like multilingual support and mobile access. None of the states have negotiated statewide rates with digital platform vendors for districts' use. Seven states reported that none of the aforementioned statewide IEP practices apply to them.

Exhibit 16. Statewide IEP Practices Across Participating States



SEA Staff Interviews

The study director facilitated interviews with SEA staff from four states who volunteered to participate. This section presents key findings from the information shared by these participants.

Origins of the Decision for Statewide IEP and Digital Platform Implementation

The decision to implement statewide IEP and digital platforms across the four participating states originated from the need to address specific challenges in managing special education processes and ensuring compliance with state and federal standards.

- **State 1** began implementing a statewide IEP platform approximately a decade ago by integrating it with the Infinite Campus student information system. The intent was to create a unified system where all student data could be managed centrally. Initially, the platform was mandatory for all districts, but functionality issues led to the state making it optional within 18 months. Despite this, the system has remained in use by many districts, with ongoing improvements supporting adoption.
- **State 2's** statewide IEP platform was introduced in response to a legislative mandate aimed at reducing paperwork and enhancing compliance with state and federal regulations. The state department of education did not initiate the platform but followed the legislative directive to implement it. The state worked to align the system with compliance requirements while addressing the administrative needs of districts.
- **State 3's** decision to implement a statewide IEP platform was driven by the challenges of managing handwritten IEPs and addressing the mobility of its student population. The state transitioned from regional systems to a unified digital platform in 2007–2008, aiming to streamline IEP management across all districts. Participants emphasized the need for a centralized system to ensure consistency in processes and compliance with state and federal standards. The platform provided tools for efficient data entry and compliance monitoring.
- **State 4** implemented a statewide IEP system to provide uniformity and consistency across districts. The state leveraged funds to procure the platform, which ensured all districts had access to a state-supported system without needing to fund their own solutions. Although the platform was not mandated, all districts initially used the legacy system, and most are expected to adopt the newer system as it transitions. Participants emphasized the importance of creating a standardized platform to simplify compliance with state and federal reporting requirements. The inclusion of features like a parent portal and electronic signature capabilities reflects ongoing efforts to meet user needs and enhance functionality.

Duration of the Implementation of the Statewide IEP and Digital Platforms

The duration and consistency of statewide IEP and digital platform usage vary across the four states, reflecting differing implementation strategies and levels of adoption.

- In **State 1**, the platform was initially mandated approximately a decade ago but became optional within 2 years due to functionality challenges. For the past 8 years, it has been available as an optional system, with adoption increasing as improvements were made.
- **State 2** began the development of its platform in 2006, with pilot testing leading to a full rollout in 2009. The platform has remained optional for districts, with over 80% adopting it during its 15 years of operation.
- **State 3** launched its required statewide IEP platform in 2007, achieving full district participation by 2008. The system was updated in 2022 with the introduction of the ACHIEVE platform, and updates are still ongoing.
- **State 4** has maintained a state-procured IEP system for nearly 20 years, initially using a legacy platform. The state recently transitioned to a modernized system to better support district needs.

Development and Cost of a Statewide IEP and IEP Digital Platform

The development and cost of statewide IEP and digital platforms vary significantly across the four states, reflecting their unique priorities, resources, and challenges. Across the four states, the balance between cost, customization, and accessibility has remained a priority, with most systems funded by the state to ensure districts have equitable access.

- **State 1** integrated Infinite Campus’s preexisting special education module into its statewide student information system, avoiding the need for a custom-built platform. This approach minimized initial development costs but required ongoing negotiations to ensure state compliance and functionality. The state funds the module, enabling districts to use the platform without additional expenses unless they choose customizations.
- **State 2** began developing its platform in 2006, contracting with Ohio State University’s Department of Education for initial work. Scalability and performance issues prompted a shift to a contractor-based model, where features are developed according to department of education–defined requirements. Reportedly, annual costs are between \$750,000 and \$1 million, excluding server and infrastructure expenses. The platform is free for districts, with the state covering all related costs.
- **State 3** initially developed its platform in collaboration with a regional education agency and later transitioned to an external vendor, Triskell, for the creation of the ACHIEVE system in 2022. The platform had an initial development cost of approximately \$4 million, with annual maintenance costs estimated between \$600,000 and \$1 million. Stakeholder input played a role in shaping the system, which is funded entirely by the state and incorporates general supervision tools.

- **State 4** has used a state-procured IEP system for nearly two decades. The latest vendor was selected through an evaluation process led by district representatives. Licensing fees vary annually based on the services selected, with optional features, such as multilingual translations, adding to costs.

Rollout and Adoption of a Statewide IEP and IEP Digital Platform

The rollout and adoption of statewide IEP and digital platforms varied across the four states, shaped by distinct strategies to engage districts and address challenges. Across the states, common strategies included leveraging stakeholder feedback, tailoring outreach to district needs, and providing comprehensive training and support to ensure successful adoption.

- In **State 1**, the rollout included state-led training, guidance documents, and technical assistance. Initially mandated, the platform became optional after functionality issues arose, but adoption increased as improvements were made. Monthly governance meetings and feedback mechanisms supported user concerns and informed refinements.
- **State 2** prioritized extensive communication and outreach, using statewide conferences, presentations, and support calls to promote its platform. The platform's cost-free availability for districts was a key factor in encouraging widespread adoption, benefiting small and rural LEAs. Although over 80% of districts adopted the platform, some larger districts opted out.
- **State 3** emphasized stakeholder engagement, with area education agencies leading district training and family outreach. The state supported adoption through a professional learning system and a ticketing system to address technical issues.
- **State 4** employed a train-the-trainer model, allowing districts to send representatives for training who then trained local users. Ongoing support included monthly updates, open office hours, webinars, newsletters, and a ticketing system to address technical issues. Adoption was widespread, though some districts initially relied on the legacy system before transitioning.

Initial and Current Reception of a Statewide IEP and IEP Digital Platform

The initial reception of statewide IEP and digital platforms varied across the four states, reflecting both technical and stakeholder-specific challenges. Overall, districts addressed initial challenges through iterative improvements, stakeholder engagement, and tailored support, driving broader adoption and greater user satisfaction.

- In **State 1**, initial resistance stemmed from technical issues with the Infinite Campus platform and concerns about the loss of district autonomy. Parents experienced minimal direct changes but needed time to adjust to the new system. Functionality improvements

and increased state support have since led to approximately 80% adoption, including all charter schools. Governance boards and feedback mechanisms have played a role in refining the system and addressing concerns.

- **State 2** faced technical issues during early pilot phases, which led to resistance from some districts. A few districts chose not to return to the platform following these challenges. Currently, over 80% of districts use the system, with improvements in functionality and training fostering trust and adoption. However, some large districts have not adopted the system.
- **State 3's** rollout was met with enthusiasm from parents and administrators for its potential to streamline processes and improve data capabilities. However, some educators found the system complex and needed time to adapt. Over time, the platform gained widespread acceptance as users became more proficient and updates addressed usability issues.
- **State 4** encountered resistance initially due to training demands, adaptation challenges, and increased workloads. Over time, satisfaction improved as ongoing support and platform enhancements were implemented. Districts appreciated added features, such as language translation options, and benefited from the state's technical support infrastructure.

Benefits of a Statewide IEP and IEP Digital Platform

The implementation of statewide IEP and digital platforms has brought a range of benefits across the four states, improving efficiency, data accuracy, and stakeholder support. Across all four states, the platforms have improved district collaboration, supported mobile families, and delivered administrative and financial efficiencies.

- In **State 1**, the integration of the Infinite Campus special education module with the statewide student information system has unified data management, reduced errors, and simplified student transfers between districts. This integration has supported compliance monitoring and reduced costs for participating districts.
- **State 2's** platform has simplified compliance with federal and state mandates and standardized IEP forms, reducing confusion for families of mobile students. The platform has also provided cost savings for smaller and rural districts and is available to districts at no cost, encouraging adoption among financially constrained LEAs.
- **State 3** integrated IEP, individualized family service plan (IFSP), and general supervision tools into a centralized system, streamlining compliance monitoring and reporting while reducing paperwork for educators. The platform's data capabilities have supported decision making and planned features, such as a family portal for real-time progress tracking, aiming to enhance family engagement.

- **State 4** has leveraged its platform to create uniformity in IEP documentation and processes, improving data transfers for mobile students and statewide reporting accuracy. Features like language translations have increased the platform’s utility, particularly for districts with stakeholders from diverse backgrounds.

Risks and Mitigation Strategies of a Statewide IEP and IEP Digital Platform

The implementation of statewide IEP and digital platforms has presented challenges that states have addressed through targeted mitigation strategies. Overall, proactive stakeholder engagement, iterative system improvements, and robust training and support systems have been critical for these states to address risks and ensure successful platform adoption and functionality.

- **State 1** experienced risks involving data errors during transfers from external systems and ensuring compliance for districts using third-party platforms. These challenges were compounded by the loss of uniformity, which complicated state-level monitoring. Mitigation efforts included frequent updates to the platform, close collaboration with Infinite Campus, and detailed compliance guidance to support districts.
- **State 2** encountered scalability issues during early implementation, which led to resistance from some districts. Additional risks included limitations in platform customization and data-sharing burdens for nonadopting districts. Mitigation strategies included ongoing technical improvements, targeted engagement with hesitant districts, and comprehensive training to enhance user confidence and trust.
- **State 3** faced high demand for user support, data security risks, and the need to keep the system relevant over time. These challenges were mitigated through a robust support infrastructure, clear protocols for system access, ongoing stakeholder engagement, and the development of internal technical expertise to reduce reliance on vendors. Frequent updates and planned features, such as a family portal, aim to address evolving user needs. The state went with a small vendor who offered the ability for more customization versus a larger vendor who offered easier and quicker implementation.
- **State 4** faced resistance during the initial rollout due to concerns about training adequacy and increased workloads. Strategies such as phased rollouts, pilot testing, and a train-the-trainer model helped ease the transition and secure district participation. Cost management was addressed by leveraging procurement laws for competitive pricing, which minimized financial risks.

Lessons Learned and Insights

The experiences of the four states provide valuable lessons for developing and implementing a statewide IEP and digital platform. Across all four states, fostering collaboration among

stakeholders, offering ongoing training to address staff turnover, and ensuring vendor accountability through detailed contracts have been essential to successful implementation. Collectively, the insights shared by these states underscore the importance of thoughtful design, phased rollouts, and active stakeholder engagement in building effective statewide IEP platforms.

- **State 1** demonstrated the value of a gradual rollout to foster stakeholder acceptance while balancing customization with compliance to meet district needs without compromising data integrity.
- **State 1** highlighted the importance of phased implementation, recommending a modular approach for transitioning to a mandatory platform. Lessons drawn from district feedback and other states underscored the need to balance customization with compliance while ensuring scalability. Training and governance structures were instrumental in managing stakeholder expectations and maintaining system adaptability.
- **State 2** highlighted the importance of conducting a system crosswalk to align district practices with platform functionality and integrating student information systems early in the development process to avoid data-sharing issues. Rigorous technical load testing was identified as important for ensuring scalability, particularly in large districts.
- **State 2** emphasized reducing administrative burdens by centralizing updates and ensuring compliance, which helped build trust among districts. Robust training, support, and communication were key to addressing district concerns and fostering adoption, with scalability testing and early alignment with district systems proving critical to success. They emphasized having enough staff to give quality support to districts to build trust in the system and in the state to provide the help needed.
- **State 3** emphasized the need for a multiyear timeline with a phased rollout to allow for system refinements, user feedback, and district-specific needs. The state identified stakeholder engagement, including technical input, feedback sessions, and training, as critical to securing buy-in and facilitating implementation. The state also highlighted the importance of developing internal technical capacity to work alongside vendors, reducing dependency and enhancing adaptability. It emphasized the importance of having enough staff in the state to roll out the product, test the system, and handle ongoing questions. Clear communication, training protocols, and regular updates were essential to addressing user needs and emerging challenges.
- **State 3's** ownership of the platform code has allowed flexibility in customization, scalability, and long-term maintenance while enabling the possibility of sharing the platform with others. Future plans, such as integrating a family portal, reflect the state's focus on user-centered design and ongoing system enhancements.

- **State 4** highlighted the importance of using realistic training datasets and piloting the platform with select districts before full deployment to identify and resolve potential issues.
- **State 4** incorporated features such as a parent portal and electronic signature capabilities to improve platform functionality, though full adoption remains a work in progress. The state's ability to refine the platform based on user feedback demonstrated the value of iterative improvements and maintaining strong vendor accountability.

Key Considerations

The combined insights from the overall landscape analysis reveal several key considerations for implementing and sustaining a statewide IEP and digital platform. These considerations include benefits, challenges, and lessons learned of a statewide IEP platform.

Benefits

- **Improved data management and compliance:** Centralized systems ensure consistent data entry and compliance monitoring, streamlining federal and state reporting processes.
- **Support for student mobility:** Platforms facilitate smoother transitions for mobile students by standardizing IEP documentation and enabling easier data transfers.
- **Cost savings for districts:** Centralized funding reduces financial burdens on districts, particularly smaller or rural LEAs.
- **Enhanced accessibility:** Features such as parent portals and multilingual capabilities improve family engagement and support diverse user needs.
- **Efficiency gains:** Platforms reduce paperwork and streamline workflows for educators, allowing more time to focus on instructional and support activities.

Challenges

- **Scalability and functionality issues:** Early implementation underscores the need for rigorous load testing and scalable design.
- **Resistance from districts:** Larger districts with established systems highlight the difficulty of securing universal adoption.
- **Training and transition burdens:** States may experience resistance due to training demands and workload increases during the transition to new platforms.
- **Balancing customization and standardization:** Customization needs at the district level often conflict with the goal of achieving statewide uniformity.

Lessons Learned

- **Phased rollouts:** Gradual implementation helps address technical issues early and build stakeholder confidence.
- **Stakeholder engagement:** Engaging with stakeholders early and having regular feedback mechanisms ensure users have buy-in to use the digital platform in the beginning, and it evolves to meet user needs.

- **Vendor accountability:** Clear contracts with detailed deliverables and training requirements are important for maintaining quality and support.
- **System adaptability:** Regular updates and user-driven enhancements, like family portals, keep platforms relevant and functional.
- **Ensuring adequate staff and resources for support:** Having enough staff and resources at the state level to ensure a smooth rollout, technical support, support resources about the system for users, and staff to provide ongoing support for districts are essential to the use and growth of the system.

Conclusion

Results from the sentiment survey, SEA staff surveys, interviews, focus groups, vendor outreach, and state website reviews offer valuable insights into the development, implementation and management of statewide IEP forms and digital platforms. Findings underscore both the opportunities and challenges associated with adopting such systems and provide actionable considerations as TEA evaluates the feasibility of a statewide IEP platform.

Key benefits identified across states include streamlined compliance with federal and state mandates, improved data accuracy, enhanced collaboration among districts, and better support for mobile students. Features like parent portals and multilingual capabilities have strengthened family engagement, and centralized systems have reduced administrative burdens and delivered cost savings, particularly for smaller and rural districts.

However, findings highlight various challenges such as resistance from districts with established platforms, concerns about scalability and usability, and balancing standardization with local customization. The data also suggest that training demands and the need for robust technical support are critical factors for successful implementation. Feedback from the sentiment survey echoed these concerns, with stakeholders emphasizing the importance of platform stability, ease of use, and adequate training and support to mitigate these risks.

Study results also highlight lessons learned, including the importance of phased rollouts, early and ongoing stakeholder engagement, and maintaining vendor accountability through clear contracts. Findings suggest that phased implementation and pilot programs offer an opportunity to address potential challenges before full-scale adoption. Additionally, results from the nationwide SEA survey and website reviews show a prevalence of optional models in most states, allowing for flexibility while encouraging voluntary adoption.

In Texas, most (78%) of sentiment survey respondents expressed support for developing a statewide digital platform, citing benefits like improved efficiency, easier student transitions, and enhanced compliance. However, concerns about local control, cost, and platform stability suggest a need for thoughtful design that prioritizes flexibility and stakeholder collaboration.

Overall, the findings from this study provide a roadmap for states considering similar initiatives. A successful statewide IEP digital platform will require a careful balance between statewide consistency and local adaptability, backed by robust infrastructure, ongoing training, and a user-centered approach.

Appendix A. Data Tables

Table A1. States With IEP Forms or Digital Platforms

State	IEP form	IEP digital platform
Alabama	Optional	Could Not Confirm
Alaska	Could Not Confirm	Could Not Confirm
Arizona	None	None
Arkansas	Mandated	None
California	Could Not Confirm	Could Not Confirm
Colorado	Optional	None
Connecticut	Mandated	Mandated
Delaware	Mandated	Could Not Confirm
Florida	Optional	Optional
Georgia	Optional	Optional
Hawaii	Could Not Confirm	Could Not Confirm
Idaho	Optional	Optional
Illinois	Optional	Could Not Confirm
Indiana	Mandated	Mandated
Iowa	Mandated	Mandated
Kansas	None	None currently, but under development
Kentucky	Mandated	Optional
Louisiana	Mandated	Mandated
Maine	Mandated	Could Not Confirm
Maryland	Mandated	Optional
Massachusetts	Mandated	None
Michigan	Optional	Could Not Confirm
Minnesota	Optional	Could Not Confirm
Mississippi	Mandated	Could Not Confirm
Missouri	Optional	None
Montana	Mandated	Mandated

State	IEP form	IEP digital platform
Nebraska	Optional	Optional
Nevada	Optional	Optional
New Hampshire	Optional	Could Not Confirm
New Jersey	Optional	Could Not Confirm
New Mexico	Optional	Could Not Confirm
New York	Mandated	Could Not Confirm
North Carolina	Mandated	Mandated
North Dakota	Optional	Optional
Ohio	Mandated	None
Oklahoma	Optional	Optional
Oregon	Mandated	Could Not Confirm
Pennsylvania	Optional	None
Rhode Island	Optional	Could Not Confirm
South Carolina	Optional	Optional
South Dakota	Optional	Could Not Confirm
Tennessee	Mandated	Mandated
Utah	Optional	None
Vermont	Optional	None
Virginia	Optional	Optional
Washington	Optional	Optional
West Virginia	Mandated	Mandated
Wisconsin	Optional	Could Not Confirm
Wyoming	Optional	None

Table A2. Response Rates per Region

Region	Number of respondents	Percent
4	1,150	18%
13	755	12%
10	693	11%
20	612	10%
11	573	9%
1	512	8%
6	376	6%
7	189	3%
5	175	3%
12	165	3%
8	144	2%
2	136	2%
16	134	2%
15	125	2%
17	122	2%
18	100	2%
3	90	1%
19	71	1%
9	60	1%
14	59	1%
Total	6,241	100%

Table A3. Reported Respondent Roles

Roles	Number of respondents	Percent
Campus-level staff	3,695	59%
Parent or guardian of a student receiving special education services	1,138	18%
District-level administrator	1,064	17%
Education service center staff	157	3%
Other	188	3%
Total	6,242	100%

Table A4. Agreement With the Development of a Statewide IEP Data Platform

Agreement scale	Number of respondents	Percent
Strongly agree	2,271	39%
Agree	2,310	39%
Disagree	508	9%
Strongly disagree	777	13%
Total	5,866	100%

Table A5. Agreement by Region on Statewide IEP Digital Platform

REGION	Strongly Disagree	Disagree	Agree	Strongly agree	Total
1	61 (13%)	26 (6%)	179 (38%)	200 (43%)	466
2	18 (14%)	7 (6%)	43 (34%)	58 (46%)	126
3	11 (13%)	7 (8%)	35 (42%)	31 (37%)	84
4	136 (13%)	99 (9%)	431 (40%)	417 (39%)	1,083
5	19 (11%)	12 (7%)	84 (50%)	54 (32%)	169
6	39 (11%)	28 (8%)	155 (45%)	119 (35%)	341
7	31 (18%)	15 (9%)	73 (41%)	57 (32%)	176
8	33 (24%)	17 (12%)	54 (39%)	33 (24%)	137
9	4 (7%)	2 (4%)	33 (60%)	16 (29%)	55
10	87 (13%)	57 (9%)	226 (34%)	295 (44%)	665
11	76 (14%)	48 (9%)	204 (37%)	218 (40%)	546
12	23 (15%)	22 (14%)	64 (41%)	47 (30%)	156
13	76 (11%)	55 (8%)	269 (38%)	304 (43%)	704
14	9 (16%)	5 (9%)	26 (46%)	17 (30%)	57
15	11 (9%)	14 (12%)	59 (51%)	32 (28%)	116
16	23 (18%)	21 (17%)	54 (43%)	27 (22%)	125
17	17 (15%)	13 (11%)	53 (46%)	31 (27%)	114
18	21 (22%)	14 (15%)	32 (34%)	27 (29%)	94
19	3 (4%)	9 (13%)	26 (38%)	30 (44%)	68
20	79 (14%)	37 (6%)	210 (36%)	258 (44%)	584
Total	777	508	2,310	2,271	5,866

Table A6. Agreement With Statewide IEP Digital Platform by Respondent Role

Role	Agreement level: Number of respondents (and percent within role)				Total
	Strongly disagree	Disagree	Agree	Strongly agree	
Campus-level staff	428 (12%)	277 (8%)	1,408 (40%)	1,382 (40%)	3,495
Parent or guardian	130 (13%)	87 (9%)	441 (43%)	361 (35%)	1,019
District-level administrator	165 (16%)	116 (11%)	338 (33%)	414 (40%)	1,033
Education service center staff	22 (15%)	10 (7%)	65 (43%)	54 (36%)	151
Other	32 (19%)	18 (11%)	58 (35%)	60 (36%)	168
Total	777	508	2,310	2,271	5,866

Appendix B. Sentiment Survey

State-Developed Individualized Education Program (IEP) Digital Platform Sentiment Survey

Introduction

To respond to stakeholder requests to research the topic, the Texas Education Agency (TEA) has partnered with the American Institutes for Research® (AIR®) to conduct a landscape analysis of states that have either developed or adopted a statewide individualized education program (IEP) digital platform for their public school systems to use. A statewide IEP digital platform means all school districts use the same IEP form with the same required content, while the digital platform is the web-based system for school districts to manage student IEPs. Part of that analysis also includes gathering input from educators, families, and other interested stakeholders to gauge interest in a state-developed IEP digital platform.

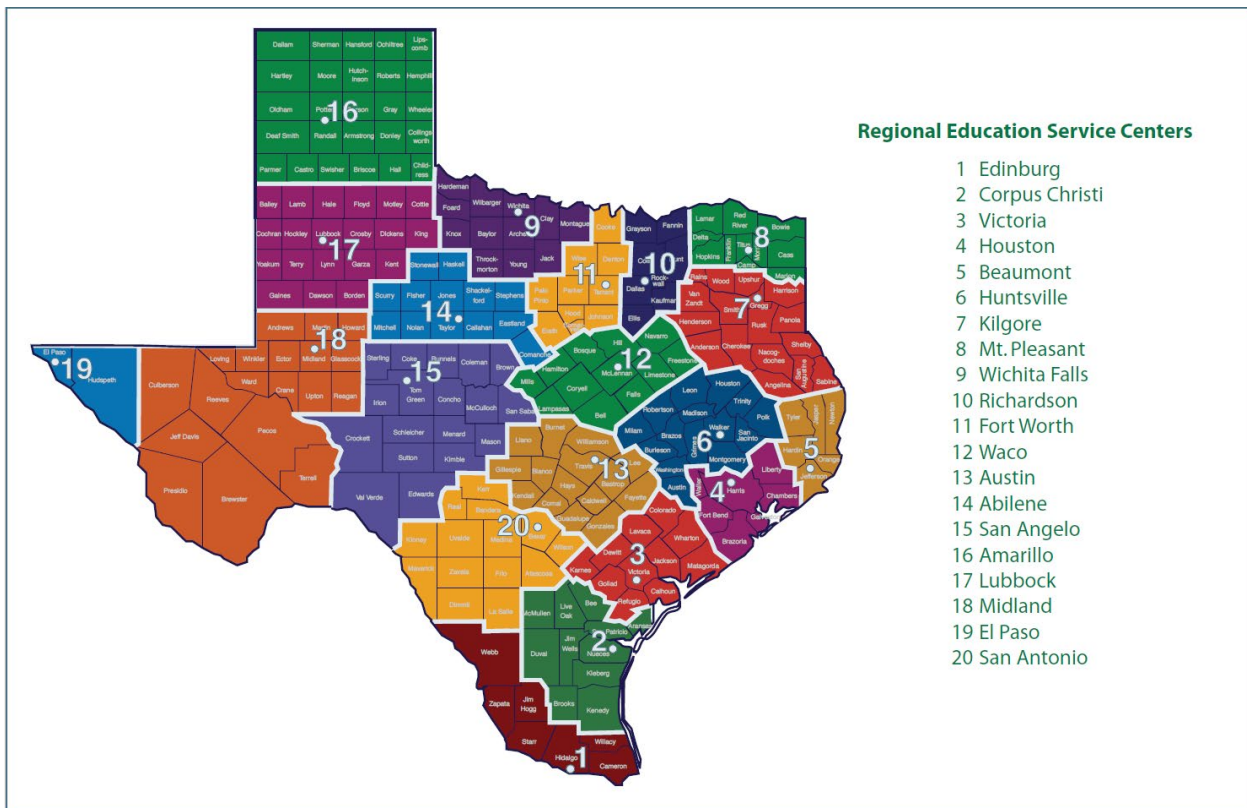
States investigate whether to adopt or develop a statewide IEP digital platform for a variety of reasons. They may want to determine whether adopting or developing such a platform would result in cost savings to the state and local school systems or whether the use of a single platform would result in a more efficient comprehensive special education system, both at the state level and campus level. State law currently requires TEA to develop a model IEP form that school districts and open-enrollment charter schools (called districts hereafter) can choose to use. However, with the advancement of technologies and increase in the depth and scope of IEPs in recent years, most districts pay a private vendor to administer an IEP digital platform for the district. While TEA is responsible for monitoring district compliance with the federal and state requirements for IEPs, the various IEP digital platforms in use throughout the state can potentially pose challenges to this process. Additionally, monitoring district compliance becomes more complicated considering the high mobility rate of Texas students who transfer to different school districts across the state throughout the school year.

As mentioned above, a critical piece of this landscape analysis is surveying various stakeholders about whether TEA should pursue an initiative to develop a statewide IEP digital platform. The survey will take no longer than 10 minutes. Thank you in advance for your participation in this phase of the analysis.

Survey

1. What is your role? (select one - Required)
 - a. Education service center (ESC) staff
 - b. District-level administrator
 - c. Campus-level staff (e.g., teacher; administrator; campus-based school psychologist, speech and language pathologist, or paraprofessional)
 - d. Parent or guardian of a student receiving special education services
 - e. Other (please indicate your role) (open text box)

2. What region are you located in? (Drop down with Regions 1 – 20- Required)



How strongly do you agree with the development of a statewide IEP digital platform if the development process was done in conjunction with various stakeholders such as yourself? (4-point Likert scale: 1= strongly disagree, 2= disagree, 3= agree, 4= strongly agree- Required)

5a. If #4 = 3 or 4, then: Please select the top 3 reasons why you agree Texas should develop a statewide IEP digital platform. (Required)

- a. Potential cost savings to the district.
- b. When students transfer it would be easier for the new district to receive and understand the student's information.
- c. It would streamline the management of IEP data, making it easier to track student progress, monitor compliance, and generate reports that could provide valuable data and insights into trends and outcomes related to IEPs for policy change and align to the model IEP.
- d. It would reduce paperwork for those districts that do not already use a digital platform.
- e. It would improve engagement and communication with families by providing them with easier access to IEP information, progress reports, and updates.
- f. When new laws or rules pass that affect the required contents of a student's IEP, those changes could be made faster.
- g. The state could provide training on the platform rather than having districts train staff.
- h. TEA could provide better technical assistance to districts since the same IEP platform would be used by all districts.
- i. It would make the state monitoring process more efficient since TEA is looking at the same IEP platform across the state.
- j. Other (open text box)

5b. If #4 = 1 or 2, then: Please select the top 3 reasons why you do NOT agree with TEA developing a statewide IEP digital platform. (Required)

- a. The time associated with district staff learning how to navigate a new platform would be a barrier.
- b. If TEA does not fully pay for the statewide platform, it could be cost prohibitive for districts.
- c. Not everyone can readily access reliable internet in our area.
- d. It may be less accessible than the program we use now.
- e. A statewide platform would take away a district's local control to choose what works best for them.
- f. It would be too difficult to transfer all our old student records into a new platform.
- g. If every district in Texas is using one platform, there could be ongoing issues with platform stability if not built and managed well.

- h. TEA might develop or adopt a platform that is not easy to use, and it would cause frustration.
 - i. It may be challenging to protect against breaches to data privacy and security on one platform.
 - j. Other: (open text box)
6. If the state decided not to pursue a statewide IEP digital platform, which of the following do you see as the most logical and efficient alternative? (select one- Required)
- a. Establish state-negotiated rates for existing for-profit platforms.
 - b. Contract with a vendor and cover the costs of the platform for a certain number of years for all districts.
 - c. Develop a statewide platform but make it voluntary to use.
 - d. Other: (open text box)
7. What IEP digital platform(s) does your district use? (select all that apply- Required)
- a. PowerSchool
 - b. IEPWriter
 - c. Frontline Special Education Management (formerly e-sped and Success Ed)
 - d. PCG Product (EasyIEP or EdPlan)
 - e. Special Education Information System (SEIS)
 - f. AbleSpace
 - g. empOWER IEP
 - h. Embrace
 - i. SameGoal
 - j. Encore
 - k. I don't know
 - l. Project Education
 - m. Other (type in answers)
 - n. My district does not use an IEP digital platform.

Thank you for your participation and partnership!

State Education Agency Survey

Landscape Analysis of States' Individualized Education Program (IEP) Forms and Digital Platforms

The Texas Education Agency (TEA) has partnered with the American Institutes for Research® (AIR®) to conduct a landscape analysis of states that have either developed or adopted a statewide individualized education program (IEP) and/or a digital platform for IEPs for their local education agencies (LEAs), including school districts and open enrollment charter schools, to use. A statewide IEP, if required as opposed to a model, means all LEAs use the same IEP form with the same required content, while the digital platform is the web-based system for LEAs to manage student IEPs. TEA has been asked by stakeholders to consider developing or adopting a statewide IEP digital platform and, as part of the landscape analysis, AIR is gathering information for TEA to learn about the practices and experiences of other states. We appreciate your willingness to fill out this survey which should take less than 5 minutes. Your answers will be kept anonymous, and participants' names and states will not be included in AIR's report to TEA. Thank you in advance for your participation.

Name: (Required)

Role: (Required)

State: (Drop down- Required)

Select all that are true (Required):

- Our state has a statewide IEP that all LEAs are required to use as they develop student IEPs.
- Our state has a statewide IEP that is designed as a "model IEP," which LEAs may choose to use as they develop student IEPs.
- Our state has a statewide IEP embedded into a digital platform that our state either developed or otherwise procured, and LEAs are required to use the digital platform.
- Our state has a statewide IEP embedded into a digital platform that our state either developed or otherwise procured, and LEAs may choose to use the digital platform.
- Our state has negotiated a statewide rate with one IEP digital platform vendor, which LEAs may choose to use.
- Our state has negotiated statewide rates with more than one IEP digital platform vendor with which LEAs may choose to contract.
- Our state has developed minimum IEP digital platform requirements (e.g., Individuals with Disabilities Education Act (IDEA) and additional state IEP requirements, availability

of multiple languages, minimum operating system requirements, option of access on mobile devices), and LEAs determine if a vendor meets the minimum requirements before entering into a contract with the vendor.

___ None of these are true for our state.

If you are willing to speak to an AIR staff member about your responses, please provide us with your email address and phone number and we will reach out to you to set up a day and time that works best for your schedule. The interview should last no longer than 45 minutes. All participants and states will be kept anonymous in our report to TEA. (short answer box- Optional)

Thank you for your time and participation!

Appendix C. State Education Agency Interview and Focus Group Protocol

Thank you so much for being here. My name is _____ and I am a _____ with American Institutes for Research or AIR. AIR, in partnership with the Texas Education Agency or TEA, is interested in learning about states' experiences with their IEP forms and digital platforms. We are meeting with several states and will be compiling all the information to inform TEA about the processes involved in adopting and implementing a statewide IEP and/or digital platform. We appreciate you being willing to share your state's experiences and the lessons you've learned.

1. Tell me how your state came to have a *[statewide IEP, statewide IEP digital platform, negotiated rates for an IEP digital platform, and/or minimum requirements for an IEP digital platform (ask about each option that is relevant)]*. What were the origins of that decision?
2. How long has your state had a *[statewide IEP, statewide IEP digital platform, negotiated rates for an IEP digital platform, and/or minimum requirements for an IEP digital platform (ask about each option that is relevant)]*?
3. *[If they have an IEP digital platform]* Did your state develop its own IEP digital platform, or did you contract with a vendor(s)?
 - a. *[If they developed their own IEP digital platform]* What were the approximate costs for your state to develop the IEP digital platform?
 - b. *[If they contract with a vendor(s)]* What vendors did you choose and why? Can you share what rate(s) your state was able to negotiate?
4. What were the processes and outreach strategies you used to introduce the *[statewide IEP, statewide IEP digital platform, negotiated rates for an IEP digital platform, and/or minimum requirements for an IEP digital platform (ask about each option that is relevant)]* to LEAs?
5. How was the *[statewide IEP, statewide IEP digital platform, negotiated rates for an IEP digital platform, and/or minimum requirements for an IEP digital platform (ask about each option that is relevant)]* **initially** received by LEAs and families? How is it received **now**?
6. *[Only applicable if they answered that they have minimum requirements]* You responded that your state has minimum IEP digital platform requirements for LEAs to use when they want to contract with a vendor on their own:
 - a. What minimum requirements did you establish for them?
 - b. How do you monitor their compliance with the minimal requirements?
7. What are the benefits of having a *[statewide IEP, statewide IEP digital platform, negotiated rates for an IEP digital platform, and/or minimum requirements for an IEP digital platform (ask about each option that is relevant)]*? Why did you see these as benefits?

8. What are the risks or unintended consequences of having *[statewide IEP, statewide IEP digital platform, negotiated rates for an IEP digital platform, and/or minimum requirements for an IEP digital platform (ask about each option that is relevant)]*. Why did you see these as risks or unintended consequences? What strategies did you use to overcome these risks or unintended consequences?
9. What are some recommendations or lessons learned you have for other states who may want to implement *[statewide IEP, statewide IEP digital platform, negotiated rates for an IEP digital platform, and/or minimum requirements for an IEP digital platform (ask about each option that is relevant)]*?
10. Any other information you would like to share?

Thank you so much for talking with me today! We appreciate you taking the time to share your state's experiences. Just in case any additional questions come up, would it be ok for us to contact you again?

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