Effective Instruction Collaborative: Using Data to Inform TA/PD

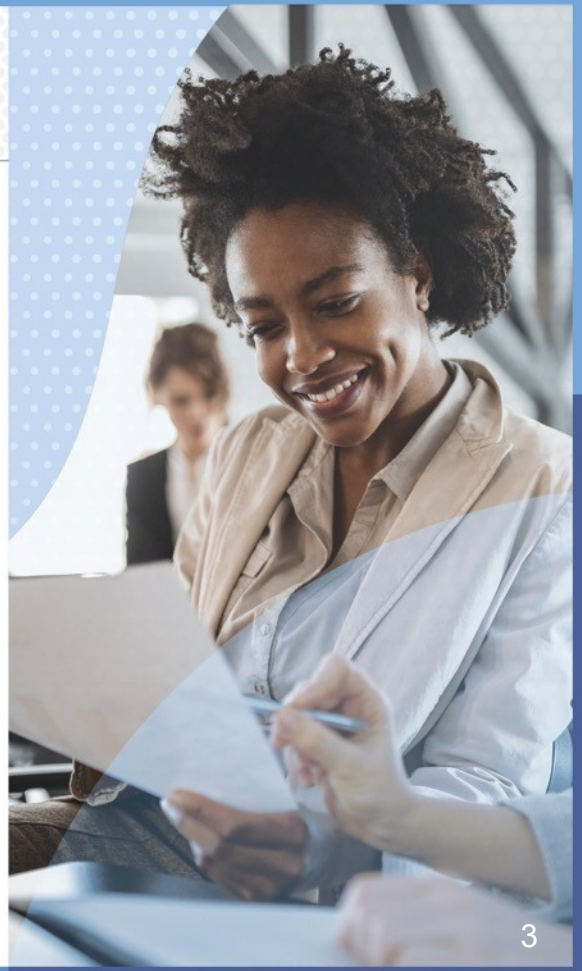
September 22, 2026

NCSI's Effective Instruction Priority Area

- Build state education agency (SEA) capacity to provide leadership for effective instruction via evidence-based and high-leverage practices
  - Know and understand the constructs of systems improvement
  - Successfully apply that knowledge
  - Effectively sustain and scale improvement over time to ensure deep and lasting impact

Agenda

- Evidence in Action
- Critical Features of Technical Assistance(TA)/Professional Development (PD) Systems
- State Panel
- Next Steps and Wrap Up



Evidence in Action

Evidence in Action (1)

- Witzel, B. S., Myers, J. A., & Mims, P. J. (2026). How are states guiding educators' implementation of specially designed instruction: A policy documentation review. *Exceptional Children.* https://doi.org/10.1177/00144029251413482



Check for updates

Original Research

How are States Guiding Educators' Implementation of Specially Designed Instruction: A Policy Documentation Review

Exceptional Children
1-22
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Bradley S. Witzel[1], Jonté A. Myers[2], and Pamela J. Mims[3]

Abstract

Specially Designed Instruction (SDI) is a legal and educational mandate that ensures students with disabilities receive individualized, evidence-based interventions to enhance their academic and behavioral outcomes. However, SDI is inconsistently implemented due to varying state policies, limited educator guidance, and disparities in defining research or evidence-based practices (EBPs). This study examined how state laws define and regulate SDI as well as incorporate EBPs to ensure instructional fidelity. We systematically analyzed state laws and policies to identify similarities, gaps, and inconsistencies within definitions of SDI, EBPs, and recommended instructional strategies. Findings indicate the need for a standardized definition of SDI, more precise policy guidance as to the planning and delivery of EBPs, and enhanced educator training to improve student outcomes.

Keywords

specially designed instruction, IEPs, inclusion, instruction, policy analysis, research methodology

Specially Designed Instruction (SDI) is a legal and educational requirement for students with disabilities, ensuring they receive tailored instruction, interventions, services, and supports to maximize their academic and behavioral performance. According to federal law, SDI is defined as:

Adapting, as appropriate to the needs of an eligible child under this part, the content, methodology or delivery of instruction (i) to address the unique needs of the child that result from the child's disability; and (ii) to ensure access of the child to the general curriculum, so that the child can meet the educational standards within the jurisdiction of the public agency that apply to all children. (34 C.F.R. §300.39[b][3])

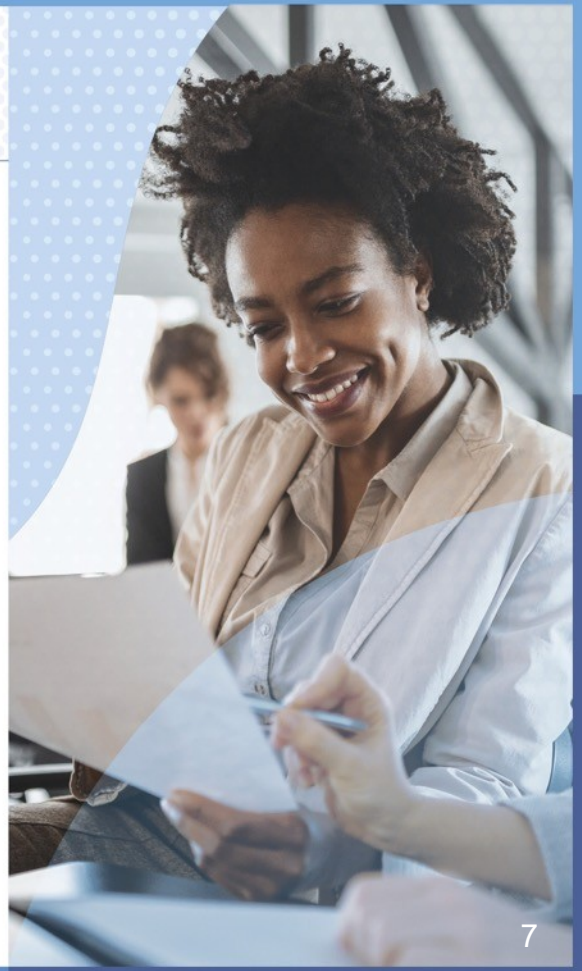
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[2]Department of Learning Sciences, College of Education and Human Development, Georgia State University, Atlanta, Georgia, USA
[3]Department of Educational Foundations & Special Education, East Tennessee State University, Johnson City, Tennessee, USA

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Critical Features of TA/PD Systems

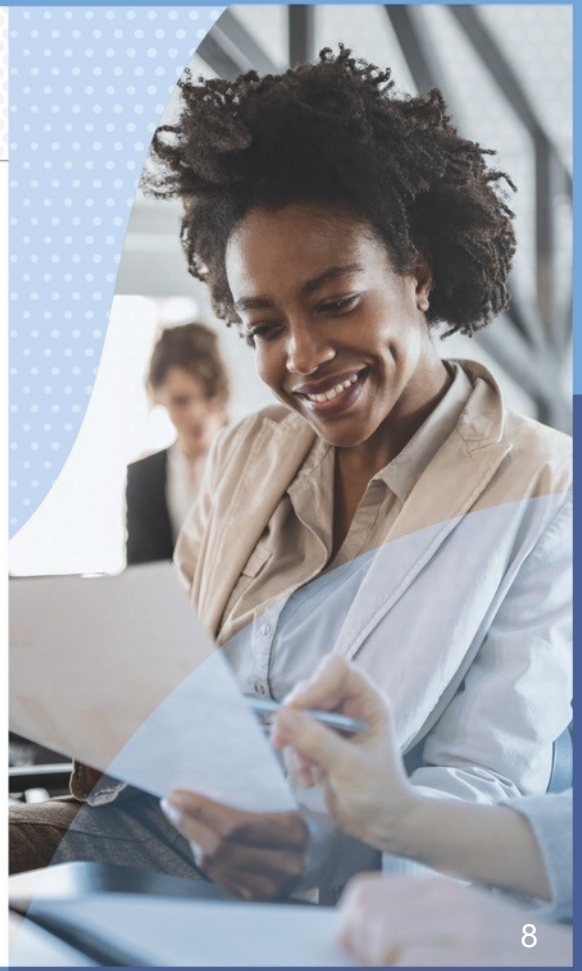
Quick Reflection (1)

- Think about a time when you experienced **effective** TA/PD. In the chat, note a couple words that describe key qualities of that TA/PD.



Quick Reflection (2)

- Think about a time when you experienced **ineffective** TA/PD. In the chat, note a couple words that describe key qualities of that TA/PD.



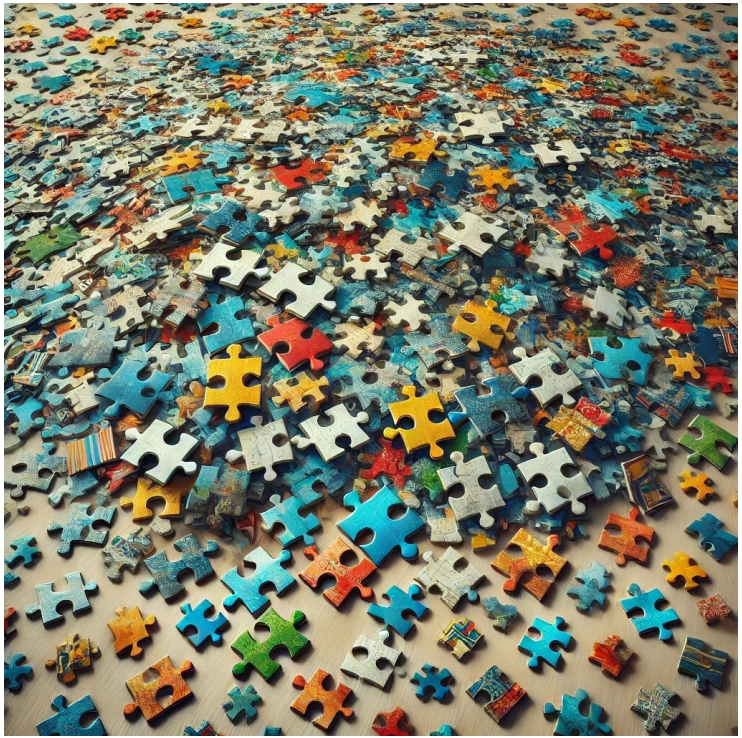
Critical Features of TA/PD Systems (1)

- TA/PD is most effective when it's context-specific and data-driven
- TA/PD systems work best when supported by a clear theory of change and shared understanding of desired results
- Implementation support is as important as content
- Lived experiences of different interest holders should be built into the TA/PD design

NCSI Systems Change Framework

- **See**: Examine the conditions producing current results and determine what changes are needed.
- **Solve**: Plan for and implement deep systemic solutions that address root causes.
- **Sustain**: Ensure ongoing commitment to results amid changing conditions.
- **Share**: Use data and insights to support systems improvement at scale.

Why is it important to see the system when designing TA/PD?



SEE the system:

- Partner with system users to define values and desired outcomes.
- Use multiple data sources to understand current conditions and inform problem-solving.
- Work collectively to understand why the system is producing current results.
- Identify specific problems to solve.

Moving from Seeing the System to Solving Problems





SOLVE problems:

- Draw on research and experiences of systems users to develop solutions.
- Make and execute plans to test possible solutions, acknowledging possible barriers.
- Use data to understand whether changes are resulting in desired improvements/impact and course correct based on your learning.

State Examples:
Delaware and Arizona





Building LEA Capacity to Use Data for Improving Outcomes for Students with Disabilities

Dale Matusevich, Director

Delaware Department of Education

Exceptional Children Resources

Delaware
Department of Education

Improving Outcomes for Students with Disabilities



How can the Delaware Department of Education (DDOE), Exceptional Children Resources (ECR) Work Group strengthen our support for LEAs to improve their data quality and ability to understand and use their data to improve outcomes for students with disabilities?

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Planning/Collaboration with IDEA* Data Center (IDC)



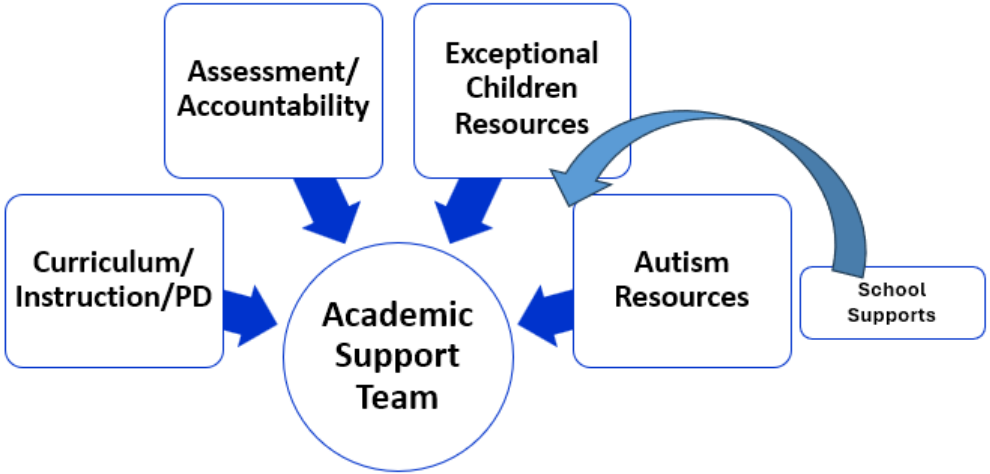
- Align efforts, resources, technical assistance and required actions to leverage support across the Department.
- Engage LEAs in understanding and using their data in a continuous improvement planning process that aligns with OSEP's 23-01 memo.

*Individuals with Disabilities Education Act

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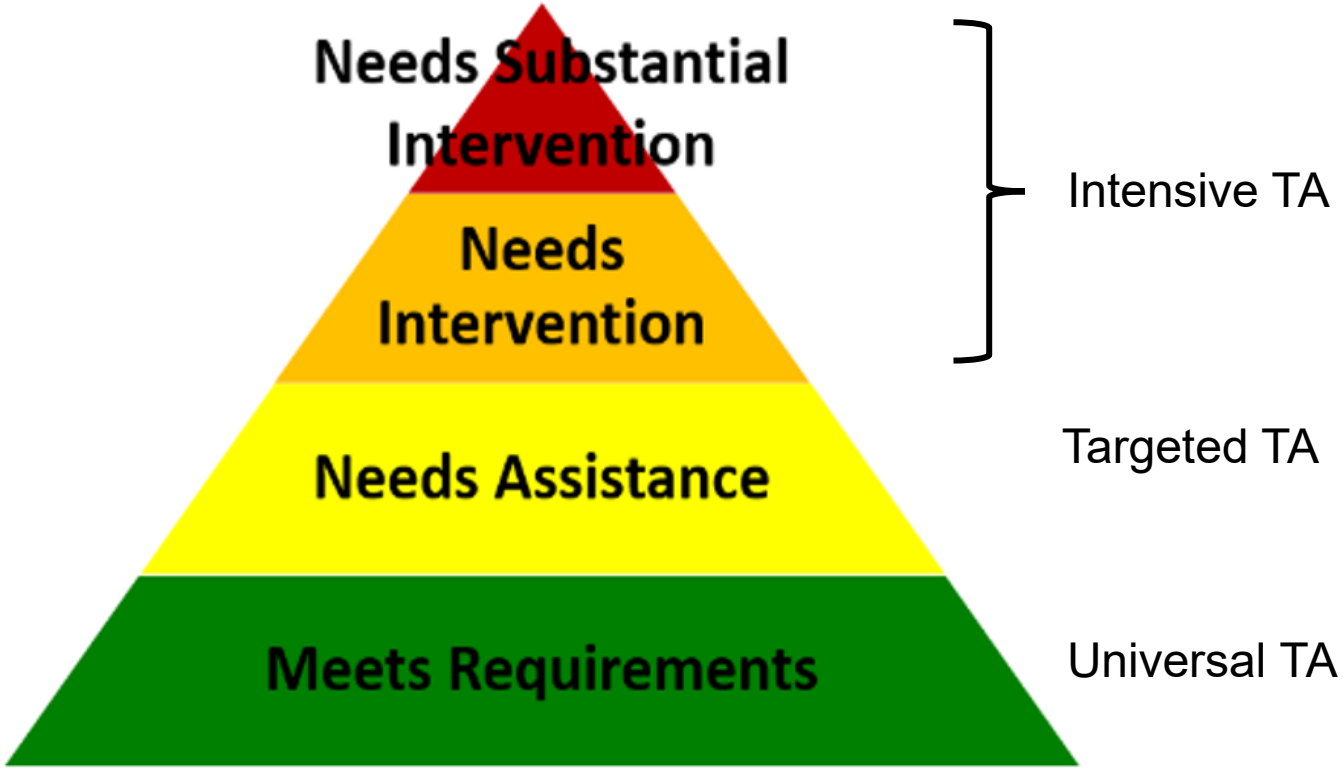
Aligning Efforts Across SEA

- ECR staff serve as liaisons to work groups across the Department
- TA Facilitators from IDC led directors across DDOE in establishing a share understanding of priorities and data analysis.
- DDOE Academic Support Team Director Meetings



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Engaging LEAs: Multi-Tiered Supports



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LEA Required Action(s) Based on Determination



- Attend data retreat
- Develop/submit improvement plan & benchmark updates
  - Engage in data analysis, conduct a Root Cause Analysis & develop a Continuous Improvement Plan including baseline measure(s), goal, benchmarks, metric, and evidenced-based strategies including provision of professional learning for staff to address root causes and implementation of strategies/activities to engage families.
- Attend monthly check-in with ECR Liaison
- Special education & regular education staff attend DDOE statewide MTSS* Cadre meetings
- Special Education Director attend DDOE statewide monthly Communication/Collaboration Network (CCN) meetings with LEA Curriculum Director
- Align IDEA funds with improvement plan activities

*multi-tiered system of support

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LEA Data Retreat: Purpose



- Build LEA* capacity and understanding of the data that influences determinations
- Create a partnership approach to TA, streamlining improvement plan work
- Proactive approach for LEAs with "meets requirements" and "needs assistance"; intensive supports for "needs intervention" and "needs substantial interventions“
- Dedicated LEA time to review data, complete Root Cause Analysis, and develop improvement plans, LEA coaching follow up

*local education agency

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LEA Data Retreat: Participants



LEAs required to bring MTSS team including special education director, curriculum/instruction, school climate, early childhood, secondary transition, CSI/TSI* administrators, and others as identified.

Special education students are regular education students first and everyone's responsibility.

*Comprehensive Support and Improvement/Targeted Support and Improvement

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LEA Data Retreat: Approach

- Partner with IDEA Data Center (IDC) to plan/facilitate retreat



Presentation of Information, Build Background Knowledge. Increase knowledge

Modeling with Whole Group, Ensure Shared Understanding

LEAs Work in Teams, Facilitators/ECR Support

- Align improvement plan with CSI/TSI plan requirements
- Provide indicator data reports by LEA including Indicator 3

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Data Retreat File

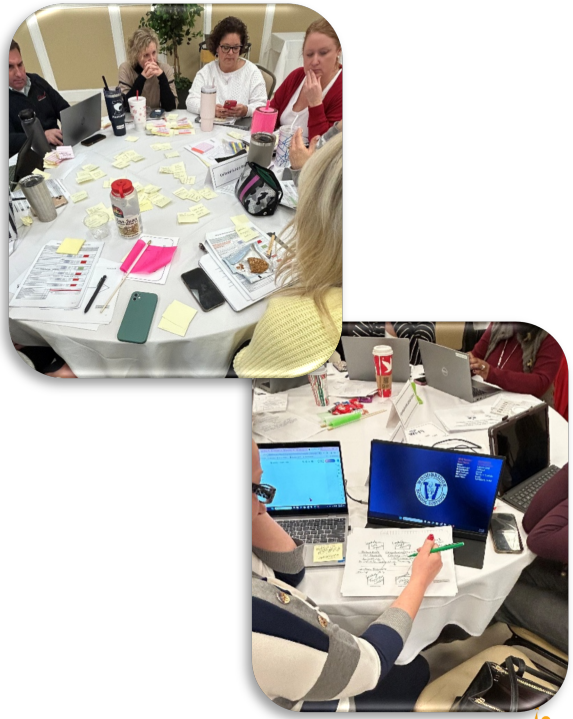
- Five Years of Data (2022-2026)
  - Exit Data
  - Assessment
  - Discipline
  - Child Count (December 1)
  - Preschool Outcomes

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LEA Data Retreat: Agenda

- 2024-2025
  - Data analysis
  - Identify 3 Indicators as priority areas (**3B required**)
  - Root Cause Analysis
  - Implementation Plan

- 2025-2026
  - Review 2024-2025 plan
  - Data Analysis
  - Identify continued areas of need (benchmarks met/unmet)
  - Enhance/refine/extend Improvement Plan



*ECR staff supported LEA teams throughout the retreat.

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LEA Feedback

- Good to have time to focus without phone calls, interruptions
- Having access to DOE staff
- Personal growth- how to personalize the data for action planning was helpful
- Helpful, reps from other areas in DOE at the same time as ECR



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LEA Successes

- Increased collaboration across areas within LEAs
- More restrictive settings (as represented by Indicator 5c) including high quality core curriculum instruction
- Increased focus on data during ECR monthly meetings with LEAs



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Data Evidence

FFY 2023 to FFY 2024 Comparison

23 out of 42 LEAs increased their total score

4 LEAs: Improved from Needs Assistance to Meets Requirements

2 LEAs: Improved from Needs Intervention to Needs Assistance

2 LEAs: Improved from Needs Substantial Intervention to Needs Intervention

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Ongoing LEA Engagement



- Strengthen cross-DDOE collaboration
- Plan for 2026-2027 SY
  - Where are we?
  - Where do we need to go?
    - ✓ Transition to differentiated data retreat (by indicator, LEA size, etc.)
- Provide ongoing TA through monthly LEA/ECR Liaison monthly meetings
  - Celebrate success/progress
  - Review Data
  - Problem solve around concerns/barriers

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If you want to hear more…..





[Podcasts | IDC - IDEA Data Center]

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Wrap-Up



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Contact Information

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Arizona Systems That Serve

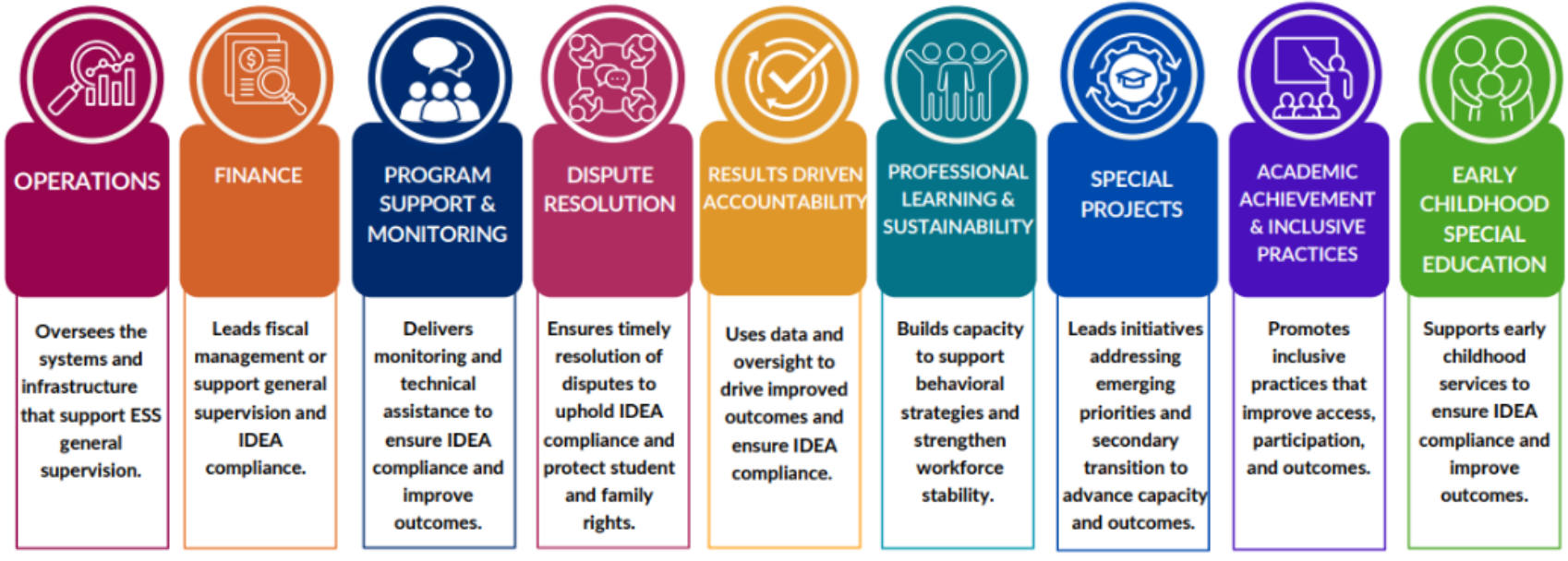
NCSI Fall 2026

Arizona's General Supervision Framework

Collaboration Within Exceptional Student Services (ESS)

To Support PEAs and Improve Outcomes for Students with Disabilities

ESS GENERAL SUPERVISION:
A COORDINATED SYSTEM OF MONITORING, TECHNICAL ASSISTANCE, AND ACCOUNTABILITY THAT BUILDS CAPACITY, ENSURES COMPLIANCE WITH IDEA, AND IMPROVES EDUCATIONAL RESULTS AND FUNCTIONAL OUTCOMES FOR STUDENTS WITH DISABILITIES.



Cross-Cutting Units to Support Implementation

When data, funding, and support systems work together, PEAs* receive focused technical assistance and professional learning that strengthens implementation, builds local capacity, and improves student outcomes.



*Public Education Agency

State Systemic Improvement Plan Embedded into the Monitoring Cycle

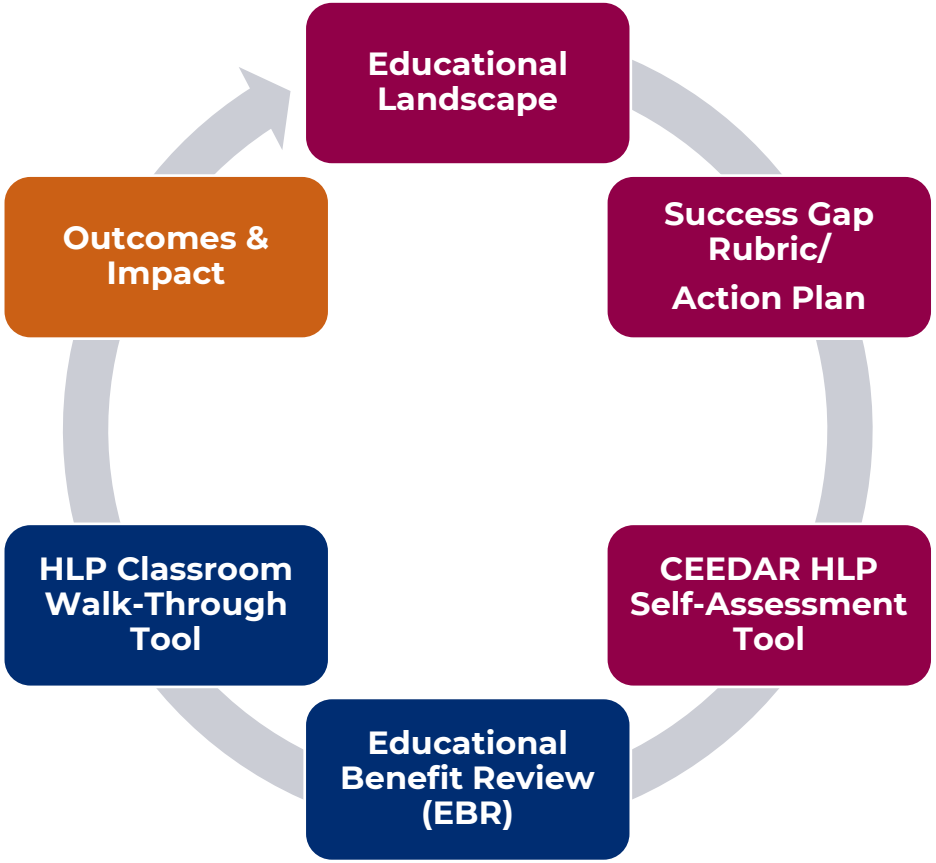
6 Year Monitoring Cycle



Program Support and Monitoring implements a cycle-based monitoring framework for all public education agencies. Monitoring activities take place in year 4 of the six-year monitoring cycle, with technical assistance (TA) provided in all other years. Monitoring activities continue to be differentiated based on the Risk Analysis Tool. This tool is aligned to the SPP/APR,* reflecting the importance of indicator data and outcome-driven general supervision.

*State Performance Plans/Annual Performance Report

SSIP Three-Year Cycle of Data-Driven Planning



Student Impact

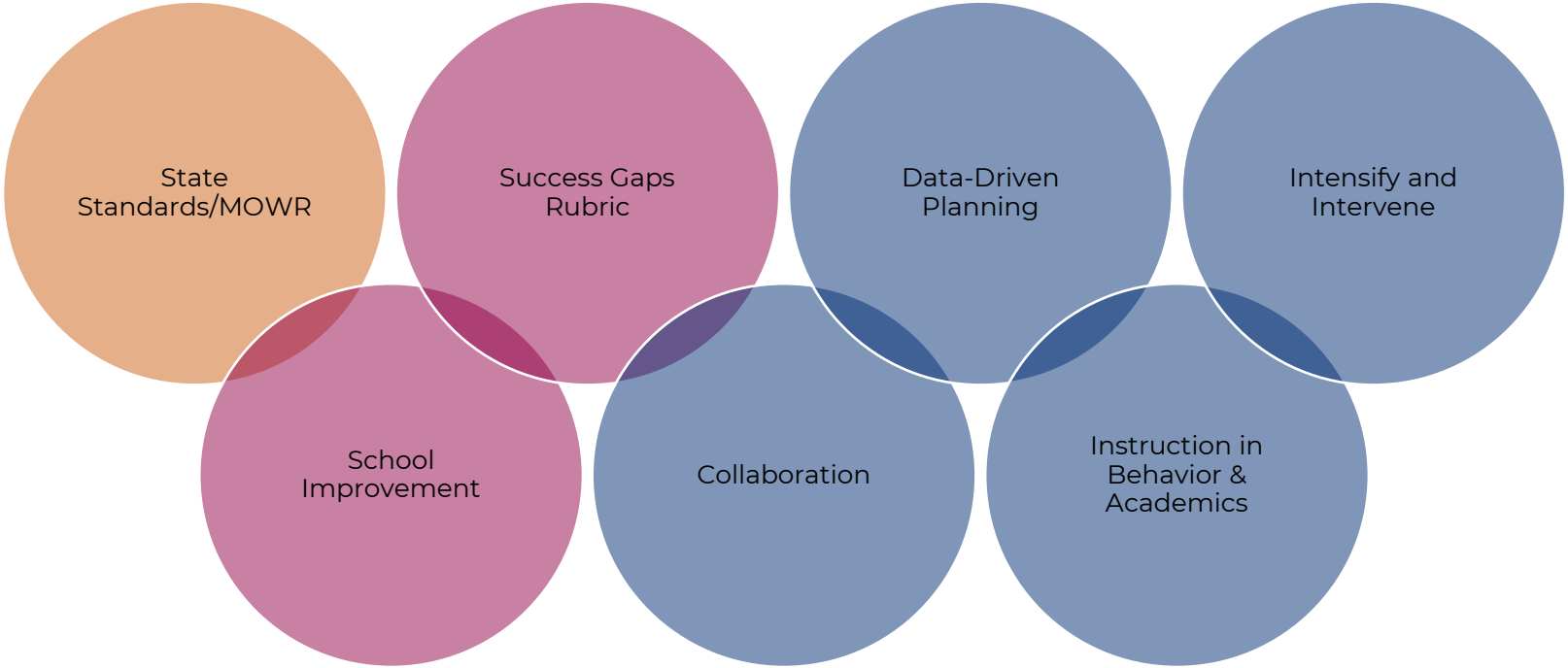
- Stronger, more explicit, and responsive literacy instruction in classrooms
- Improved literacy outcomes
- Improved educational benefit/outcomes for students with disabilities
- Reduced performance gap between students with disabilities and their peers

State-Identified Measurable Result (SiMR)

- Increase Grade 3 ELA proficiency for students with disabilities

Systems Alignment Toward Outcomes

Strong systems work begins with shared understanding, thoughtful prioritization, and clarity around the next right step.



Technical Assistance and Professional Learning

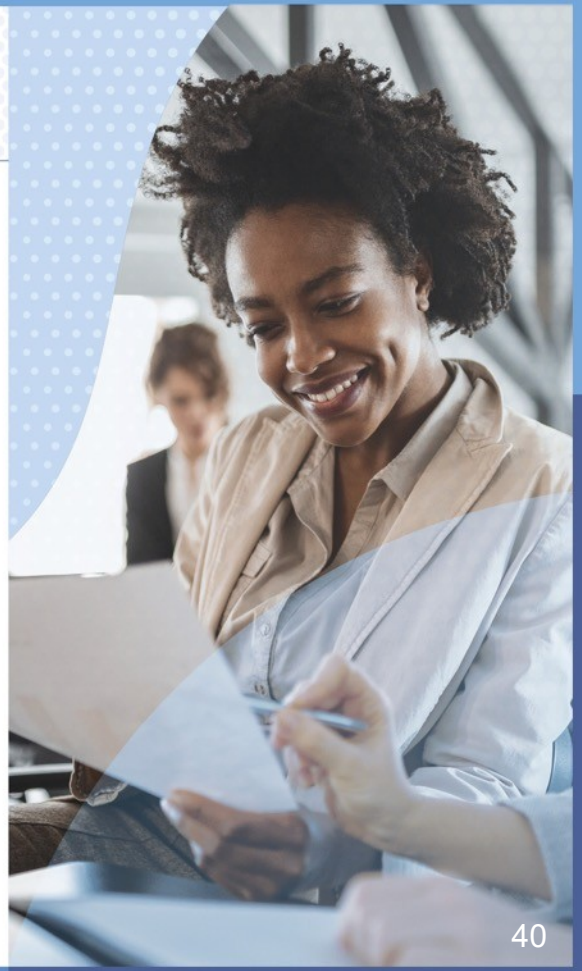
- Coaching support by Special Education Inclusion Specialist from Academic Achievement & Inclusive Practices and Program Support and monitoring Units
  - Specialist will collaboratively support PEAs

- Monthly Webinars on the High-Leverage Practices
- Community of Practice focused on Inclusion
- Variety of additional Professional Learning shared Via (Listserv)

Planning for Future Sessions

Feedback: Planning Ahead

- Menti Link: https://www.menti.com/blu2byedwkoa



Next Steps

Next Meeting

- **Tuesday, October 27**
- 11:30 AM -12:30 PM Eastern
- Topic: Nate Levenson shares lessons learned from Louisiana's efforts to improve outcomes for students with disabilities
- Questions or thoughts?
  - Reach out to us at ncsi-ei@wested.org



Thank You

The content of this product was developed by the National Center for Systemic Improvement (NCSI) under a grant from the U.S. Department of Education, #H326R240001. However, those contents do not necessarily represent the policy of the U.S. Department of Education, and you should not assume endorsement by the Federal Government. Project Officer: Julia Martin Eile (September 2026)

WestEd is the lead organization for NCSI. For more information about the work of WestEd, NCSI, and their partners, please visit www.ncsi.wested.org and www.wested.org