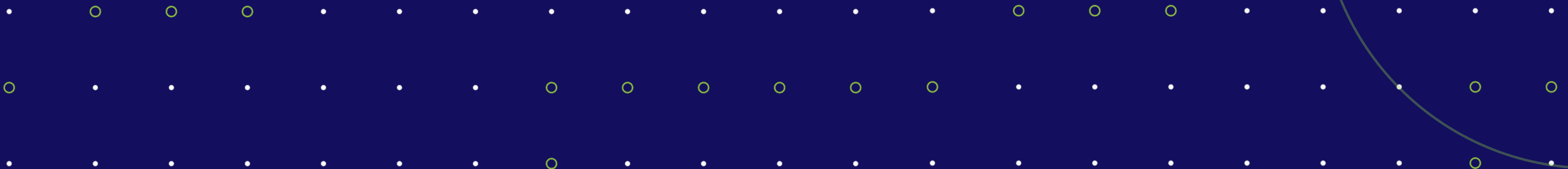




# IEP Systems That Work: Balancing Compliance and Instruction

A District's Path to Scalable IDEA Compliance Including Documentation, Data, and Instruction



# Helping Educators Lead with Confidence

From simplifying compliance to strengthening instruction, Level Data ensures you have timely, accurate data at your fingertips for every aspect of teaching and learning.



**Educational Return  
on Investment**



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 **Level Data**

# Meet Your Host



## Evan Spellman

Product Director, Level Data

Evan Spellman is a seasoned product leader and edtech professional with a master's degree in education and over a decade of experience spanning K–12 and higher-ed classroom teaching, instructional coaching, and district-level consulting.



# Meet Your Presenter



## **Pamela Ardis Wimbish**

Director of Special Education  
Birmingham City Schools

Pamela Wimbish is an educational leader with 25+ years in special education, speech-language pathology, and administration. She serves as Director of Special Education for Birmingham City Schools, overseeing districtwide special education programming. She holds degrees from Alabama A&M and Jacksonville State and is pursuing an Ed.D. at the University of AL.



# Poll

**What data does your special education team currently track?**

- A. Services
- B. Progress
- C. Accommodations/Modifications
- D. All of the above

# Poll

Is your current method of tracking IEP data effective?

A. Yes

B. No

# Poll

**What insights can you gain when documentation is consistent?**

- A. Service delivery patterns
- B. Instructional effectiveness
- C. Goal progress trends
- D. Resource allocation needs
- E. All of the above

# What You Will Learn

Four takeaways for building systems that hold up under audit and drive outcomes

01

## Systems That Do Both

Key steps and decision points for building systems that support compliance AND targeted intervention.

03

## Technology & Sustainability

How to leverage technology to reduce compliance risk while keeping the focus on instruction.

02

## Staff Buy-In

How to build buy-in for standardizing service tracking and progress monitoring across a district.

04

## Evolving the Balance

How to strike a sustainable balance between compliance and instruction as a district grows and changes.

# The Challenge Every District Faces

At the heart of every IEP are educators working to provide the instruction, intervention, and support a student needs to thrive. Documentation and compliance matter—but not at the expense of what drives student outcomes.

## COMPLIANCE

- Documentation accuracy under IDEA
- Timeline adherence and audit readiness
- Consistent, standardized service tracking
- Federal and state monitoring indicators

+

## INSTRUCTION

- Targeted intervention driven by real data
- Progress monitoring tied to student goals
- Teacher time protected for instruction
- Growth outcomes for students with disabilities

# A Five-Part Framework for Sustainable Systems

Built in Birmingham City Schools, and repeatable in any district



Professional Development

Continuity of training for special ed and general ed staff

Digitizing Documentation

Universal screening & progress monitoring for every student

Data Interpretation & Intervention

PLCs use the data to determine appropriateness of interventions

Scaling Staffing & Resources

Growing capacity as demand increases

Structures for Sustainability

Making the system outlast any one person

# 1

# Professional Development Framework

Continuity of training for special education and general education staff

## What it includes

- Standardized training scope and sequence, so every new hire lands on the same foundation regardless of start date
- Ongoing sessions on IDEA, FAPE, LRE, and MTSS/RTI, layered so staff build depth year over year
- District leadership and principals trained alongside special education staff on instructional practices and compliance

*Built as a living framework that will be revisited and updated each year, not a one-time training rollout.*

## Why it matters

*Compliance failures are rarely willful: they're a training gap. A living PD framework closes that gap before it becomes a finding, and it turns every teacher into a first line of defense for both compliance and instructional quality.*

Facilitated for district leadership, principals, and special education and general education teachers districtwide.

# 2

## Digitizing Documentation & Progress Monitoring

Technology as the backbone of sustainable, low-risk compliance

### Universal Screening, All Students

A digital universal screening and progress-monitoring program tracks every student districtwide—not just those already flagged so data exists before a referral is ever made.

### Real-Time Visibility

Leadership can see timeline status, service delivery, and documentation gaps as they happen not after an audit flags them.

### Reduced Compliance Risk

Standardized digital workflows close the gap between what's supposed to happen and what's documented as happening.



# 3

## From Screening Data to PLC Decisions

Training staff to read universal screening and progress-monitoring data and act on it in PLCs

Screen

Interpret

Discuss in PLC

Decide

Monitor

- Universal screening and progress-monitoring data is trained and interpreted consistently across teams, not read differently room to room
- Grade- and content-level PLCs meet on a set cycle to review intervention data together, not just individual case managers reviewing alone
- PLC teams use the data to determine whether an intervention is working, needs adjustment, or should be discontinued before a student is referred for evaluation
- Data reviews feed directly into intervention planning not just into a compliance file

*The shift: data stops being something staff collect for a file and becomes something a PLC acts on for a student.*

# 4

## Scaling Supports and Resources

**Matching** staffing growth to a growing scope of work

### Added Central Office Capacity

Grew departmental staffing to keep pace with caseloads, contract oversight, and compliance monitoring without pulling capacity away from direct service.

### Expanded Related Service Providers

Increased the provider network so students access the frequency and intensity of services their IEPs actually require.

### A New Center-Based Program

Built a therapeutic behavioral program to serve students with significant behavioral and mental health needs a resource that didn't previously exist in the district.

*Staffing followed need, not the reverse—each addition traces to a documented gap in service delivery or compliance capacity.*



# 5

## Building a Framework of Sustainable Structures

Making the system outlast any single person or budget cycle

### Documented Protocols

Every process training, data review, documentation is written down, not held in one person's head.

### Distributed Ownership

Roles and accountability are spread across the department, not concentrated at the top.

### Built-In Feedback Loops

Systems are reviewed and adjusted on a regular cycle as the district's needs evolve.

### Monitoring Built for Growth

Structures are designed to flex as caseloads, staffing, and compliance requirements change.

*This is the pillar that connects the other four—without it, every gain resets with the next staffing change.*

# Building Staff Buy-In

1

## Lead With the Way

Frame new systems around what they free teachers up to do more instruction, less duplicate paperwork not just what's newly required.

2

## Train Leadership First

Principals and district leaders build fluency in the practices and the compliance requirements before staff are asked to adopt them.

3

## Make the Standard Visible

Consistent service tracking and progress monitoring becomes the norm because leadership models and reinforces it districtwide.

4

## Close the Loop

Feedback from mediators, case managers, and providers shapes how the systems are refined over time.

*Buy-in isn't a kickoff meeting—it's built through the whole rollout, one reinforced habit at a time.*

# What Changed in Birmingham

## Results from putting the five-part framework into practice

- Brought the district's essential indicators into full federal and state compliance
- Standardized professional development ensures continuity of training regardless of staff turnover
- A digitized universal screening and progress-monitoring system tracks every student and gives leadership real-time visibility into compliance status
- PLCs meet on a set cycle to review intervention data and determine appropriateness connecting academic teams and special education around shared decisions





**Compliance and instruction aren't competing priorities; the right systems make them the same system.**

# How Can Brolly Help Your District?

# Brolly Makes Compliance Easy



## Improve Data Collection

Log service and accommodation delivery for multiple students at once. Fast bulk entry with a full audit trail on every log.



## Identify Gaps

See exactly what students are not documented and by which teacher. Close gaps before they become complaints.



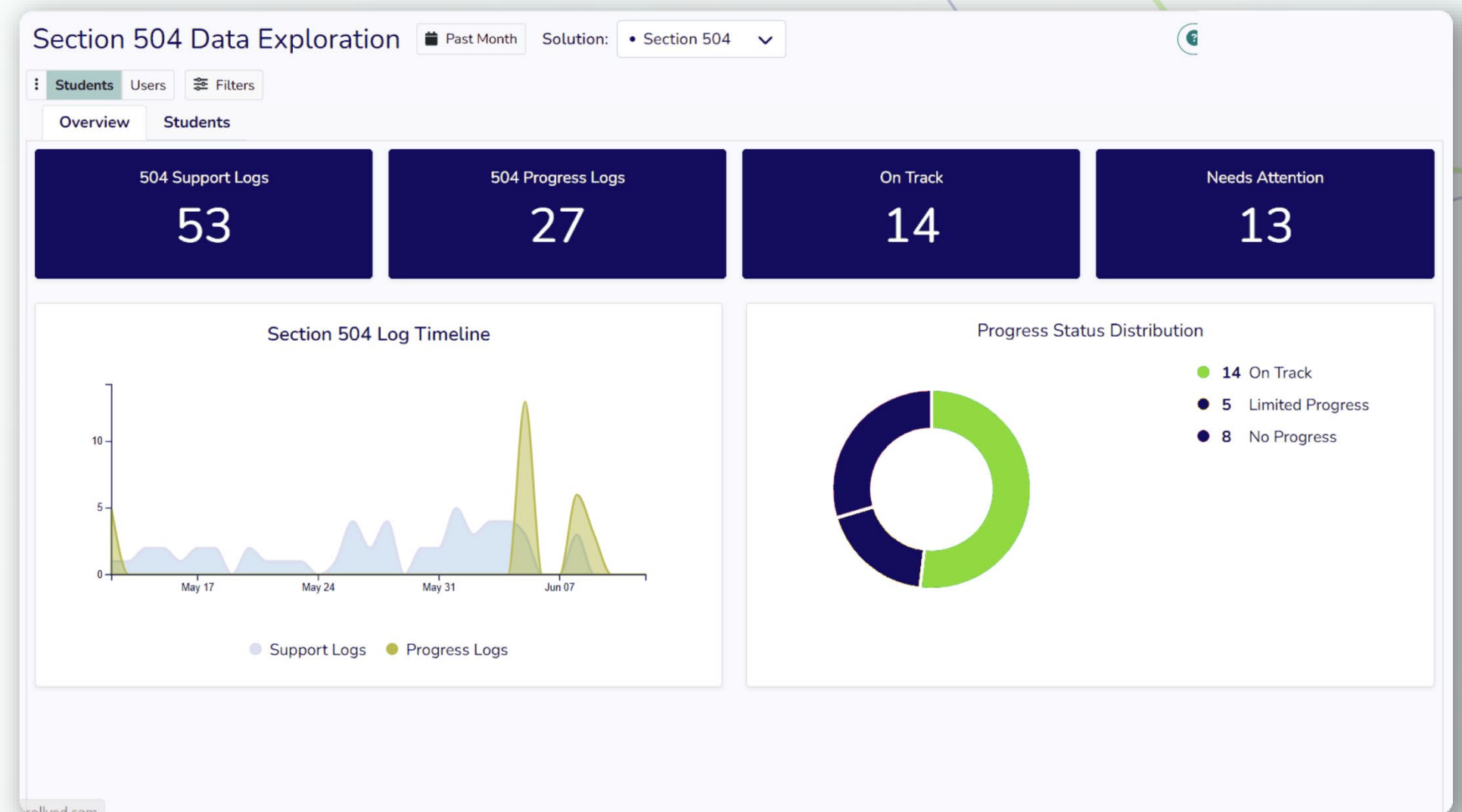
## Demonstrate Progress

Connect delivery data to student outcomes. Show that services were delivered and that they worked.

# Brolly Enables Data-Driven Decisions

Brolly's **real-time data visibility** gives all team members the ability to analyze trends and identify gaps.

- Know which students are falling behind on minutes or goals before it's too late
- Filter from districtwide trends down to a single student in a few clicks



# Brolly Fosters Communication

Everything tracked is reported on so you can generate the data you need to take action or respond to a parent or audit request.

- See expected versus delivered minutes at a glance—quickly spot which providers need a nudge on documentation
- Quickly pull a single Student Detail Report showing services, progress, provider notes, and IEP goal alignment in one place

The screenshot displays the Brolly by LevelData interface. At the top, a summary for the provider shows 136 Total Service Logs, 14130 mins Total Service Minutes, and 0 Total Progress Logs. Below this is a table listing students and their service data. A pop-up window for 'Adrian Russell - Communication' shows a goal for communication skills and a table of service logs.

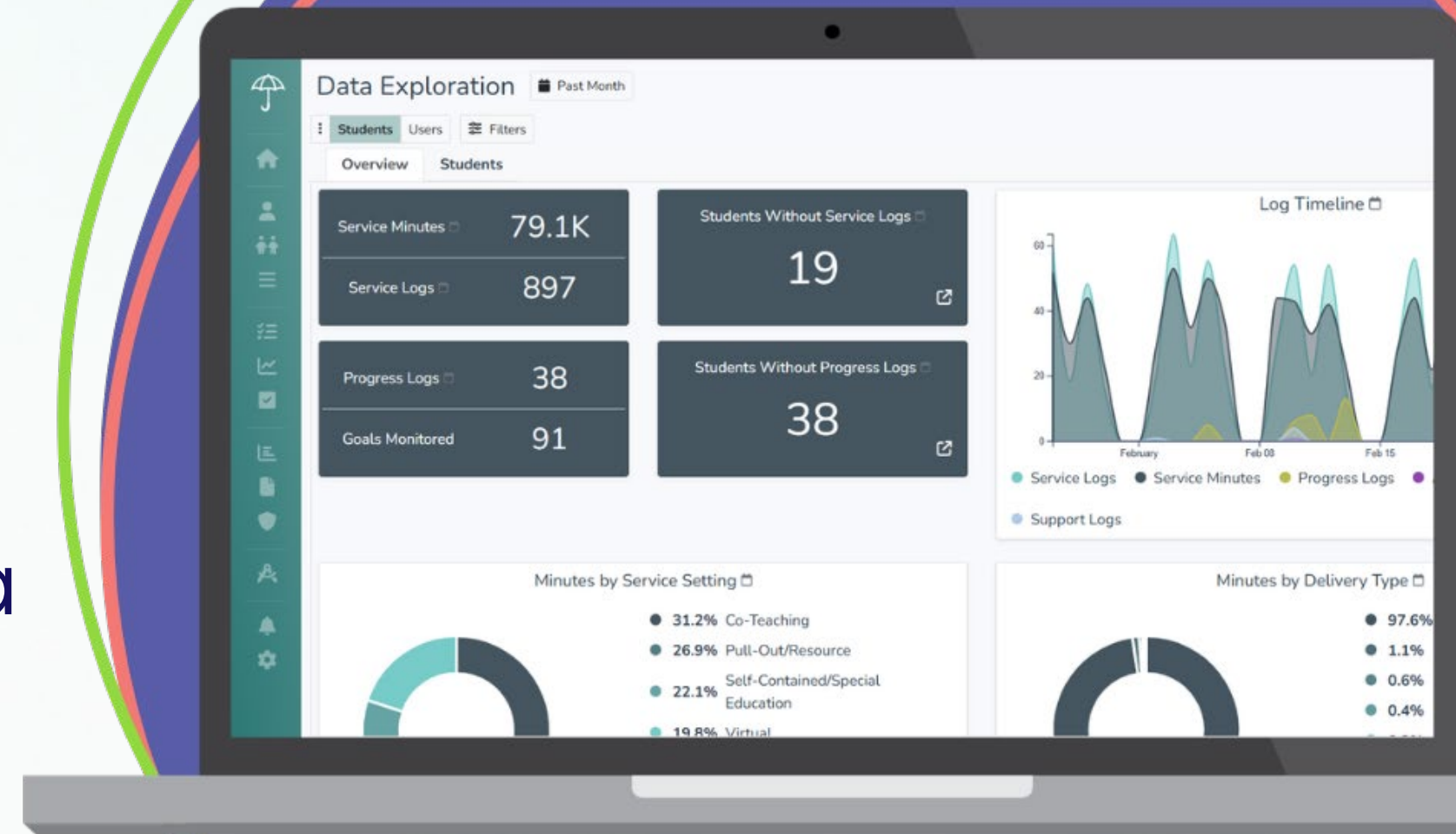
| Student            | Total Service Logs | Total Service Minutes | Last Service Log | Total Progress Logs | Last Progress Log | Monitored Goals |
|--------------------|--------------------|-----------------------|------------------|---------------------|-------------------|-----------------|
| Adrian Russell     | 4                  | 240                   | 06/11/2026       | 0                   |                   | 0               |
| Audra Martin       | 0                  | 0                     |                  | 0                   |                   | 0               |
| Caroline Wilson    | 0                  | 0                     |                  | 0                   |                   | 0               |
| Charles Rutherford | 11                 | 1020                  | 06/12/2026       | 0                   |                   | 0               |
| Conner Williams    | 7                  | 480                   | 06/04/2026       | 0                   |                   | 0               |
| Dominic Scott      | 26                 | 3030                  | 06/12/2026       | 0                   |                   | 0               |
| Danna Walsh        | 2                  | 300                   | 06/21/2026       | 0                   |                   | 0               |

| Date/Time                           | Type    | Outcome              | Notes                                                                                                                                                                                                                                                                                                        |
|-------------------------------------|---------|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Wed 6/10/2026<br>12:30 PM - 6:30 PM | Service | 360 mins,<br>Virtual | Adrian focused on formal vs. informal language use. We then moved on to active listening strategies. Additionally, we practiced public speaking skills. The student demonstrated progress in giving and receiving compliments and showed interest in tone of voice exercises.<br>- Submitted by Ryan Jeffers |

# What Does Brolly Offer?

- SDI documentation
- IEP goal progress tracking
- Student notes and centralized data
- Robust reporting center (progress reports, student summaries)
- Dashboards and insights for annual IEP planning



Free Resource

# An Administrator's Guide to a Compliance-Ready Special Education Program

Inside you'll find practical strategies, reflective exercises, and shareable resources to help close these gaps and better serve every student with a disability in your community.





# Q&A



# Thank you for joining us!



[www.leveldata.com/brolly](http://www.leveldata.com/brolly)

