OEC May Office Hours

Specially Designed Instruction (SDI)

Office for Exceptional Children

Welcome!

Participant Information

- Mics and cameras off
- Comments/questions in the Q&A section
- If you have questions that DO NOT pertain to today's topic, please add them to the session evaluation survey
- If you have a question that is specific to a student, please reach out to the Office for Exceptional Children mailbox at exceptionalchildren@education.ohio.gov

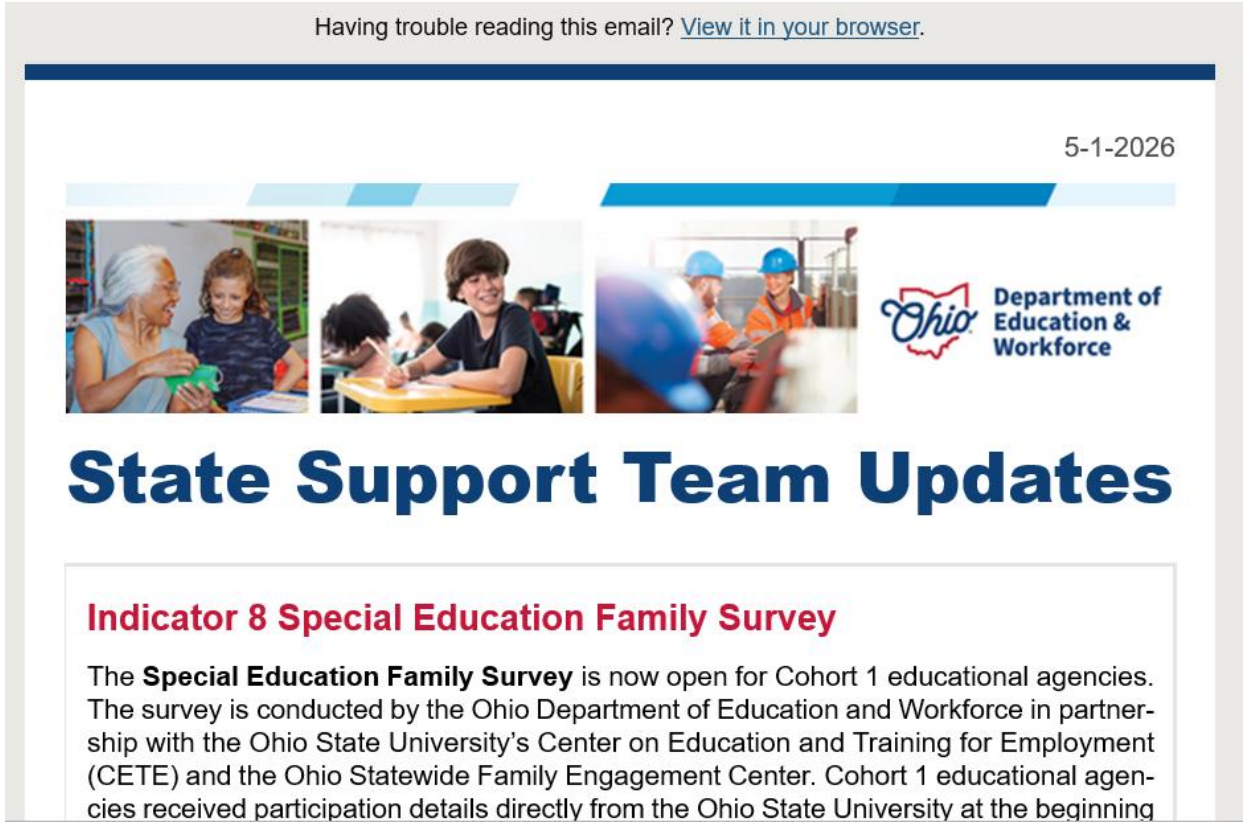
OEC Updates

SAMIS SESSIONS FOR 2026-2027

Date	Title
9/3/2026	Desk Review 1 and 2 Phases Overview
10/01/2026	Learning Management System
11/05/2026	Ohio District Data Exchange (ODDEX)
12/03/2026	Desk Review 3 and 4 Phases Overview
01/07/2027	Comprehensive ETR on 2018 Forms
02/04/2027	Comprehensive IEP on 2018 Forms
03/04/2027	Literacy
04/01/2027	2026 Forms Overview
05/06/2027	MDR and Discipline

OEC Newsletter

- Sign up to receive the OEC Newsletter!


Having trouble reading this email? View it in your browser.

5-1-2026

Department of Education & Workforce

State Support Team Updates

Indicator 8 Special Education Family Survey

The **Special Education Family Survey** is now open for Cohort 1 educational agencies. The survey is conducted by the Ohio Department of Education and Workforce in partnership with the Ohio State University's Center on Education and Training for Employment (CETE) and the Ohio Statewide Family Engagement Center. Cohort 1 educational agencies received participation details directly from the Ohio State University at the beginning

- https://public.govdelivery.com/accounts/OHED/subscriber/new
  - Special Education Updates

OEC OFFICE HOURS SESSIONS

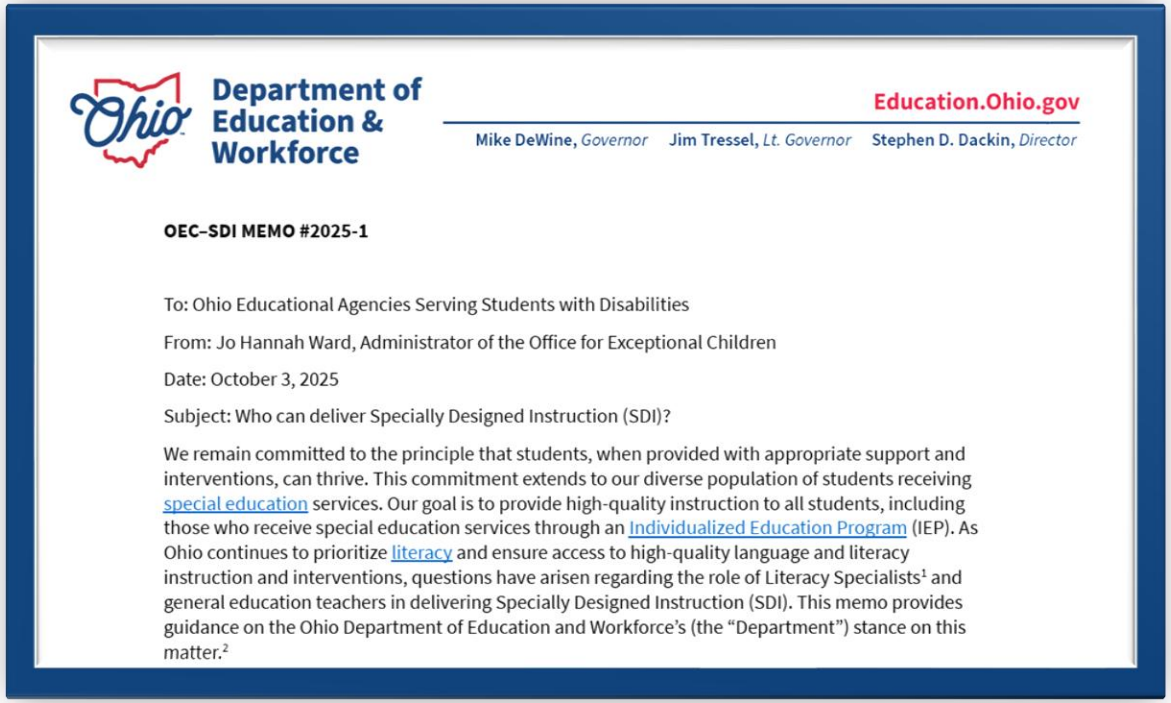
- Last Wednesday of the month
- 3:00-4:00pm
- May: 27
- Topics: New forms
- Audience: all stakeholders

Check website for updated topics and previous sessions!

https://education.ohio.gov/Topics/Special-Education/Office-of-Exceptional-Children-Contact-Information

Specially Designed Instruction

SDI Memo



Department of Education & Workforce

Education.Ohio.gov

Mike DeWine, *Governor* Jim Tressel, *Lt. Governor* Stephen D. Dackin, *Director*

OEC–SDI MEMO #2025-1

To: Ohio Educational Agencies Serving Students with Disabilities

From: Jo Hannah Ward, Administrator of the Office for Exceptional Children

Date: October 3, 2025

Subject: Who can deliver Specially Designed Instruction (SDI)?

We remain committed to the principle that students, when provided with appropriate support and interventions, can thrive. This commitment extends to our diverse population of students receiving special education services. Our goal is to provide high-quality instruction to all students, including those who receive special education services through an Individualized Education Program (IEP). As Ohio continues to prioritize literacy and ensure access to high-quality language and literacy instruction and interventions, questions have arisen regarding the role of Literacy Specialists[1] and general education teachers in delivering Specially Designed Instruction (SDI). This memo provides guidance on the Ohio Department of Education and Workforce's (the "Department") stance on this matter.[2]

- https://education.ohio.gov/topics/special-education/federal-and-state-requirements/operational-standards-and-guidance

Code of Federal Regulations

According to **federal regulations 34 CFR 300.114(a)(2)** these students are to be educated with their non-disabled peers to the maximum extent appropriate.

The development and primary implementation of SDI must adhere to the review and revision process within The Operating Standards for the Education of Children with Disabilities.

Code of Federal Regulations 2

Federal regulations 34 CFR§ 300.39 (b)(3) ***Specially designed instruction*** means 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.

SDI State Administrative Code

Ohio Administrative Code (OAC) 3301-51-01 (62) (b) (iii) SDI means adapting, as appropriate to the needs of an eligible child, the content, methodology, or delivery of instruction:

(a) To address the unique and individual needs of a child with a disability and

(b) To ensure access to the general curriculum, so that the child can meet the educational standards applicable to all children.

SDI goes beyond general education instruction to provide specialized support and accommodations to address specific challenges faced by students with disabilities.

Code of Federal Regulations 3

Federal regulations 34 CFR§ 300.156 Personnel qualifications

(a) ***General.*** The SEA must establish and maintain qualifications to ensure that personnel necessary to carry out the purposes of this part are appropriately and adequately prepared and trained, including that those personnel have the content knowledge and skills to serve children with disabilities.

Code of Federal Regulations 4

Federal regulations 34 CFR§ 300.156 Personnel qualifications

(c) ***Qualifications for special education teachers.***

(1) The qualifications described in paragraph (a) of this section must ensure that each person employed as a public-school special education teacher in the State who teaches in an elementary school, middle school, or secondary school—

(i) Has obtained full State certification as a special education teacher (including certification obtained through an alternate route to certification as a special educator, if such alternate route meets minimum requirements described in 34 CFR 200.56(a)(2)(ii) as such section was in effect on November 28, 2008), or passed the State special education teacher licensing examination, and holds a license to teach in the State as a special education teacher, except that when used with respect to any teacher teaching in a public charter school, the teacher must meet the certification or licensing requirements, if any, set forth in the State's public charter school law;

(ii) Has not had special education certification or licensure requirements waived on an emergency, temporary, or provisional basis; and

(iii) Holds at least a bachelor's degree.

Code of Federal Regulations

Federal regulations 34 CFR§ 300.156 Personnel qualifications

(d) ***Policy.*** In implementing this section, a State must adopt a policy that includes a requirement that LEAs in the State take measurable steps to recruit, hire, train, and retain personnel who meet the applicable requirements described in paragraph (c) of this section to provide special education and related services under this part to children with disabilities.

Ohio Administrative Code

OAC 3301-51-09(G) requires that an intervention specialist and/or a related service provider must be assigned to students with disabilities.

- This means every student who qualifies for special education services will be assigned to an Intervention Specialist and/or a Related Service Provider's caseload.
- The Intervention Specialist and/or Related Service Provider must be listed in the specially designed services section of the student's IEP and are required to be part of the IEP team.
- Intervention Specialists and Related Service Providers are responsible for ensuring services and supports are in place and provided as determined by the student's IEP.
- They collaborate with the IEP team to develop and execute IEP's, provide SDI, complete special education paperwork, monitor student progress, and communicate with families and other professionals.

Setting the Stage: IEP

LOCAL POLICIES AND PRACTICES

Policy

- A policy explains what must happen and why.
- Policies are broad, high-level, and aligned with laws or educational values.

Practice

- A practice is the typical or recommended way something is done within the educational agency.

Procedure

- A procedure is the specific, step-by-step set of actions staff follow to carry out a policy
- It explains how to do something in detail so that it is done consistently.

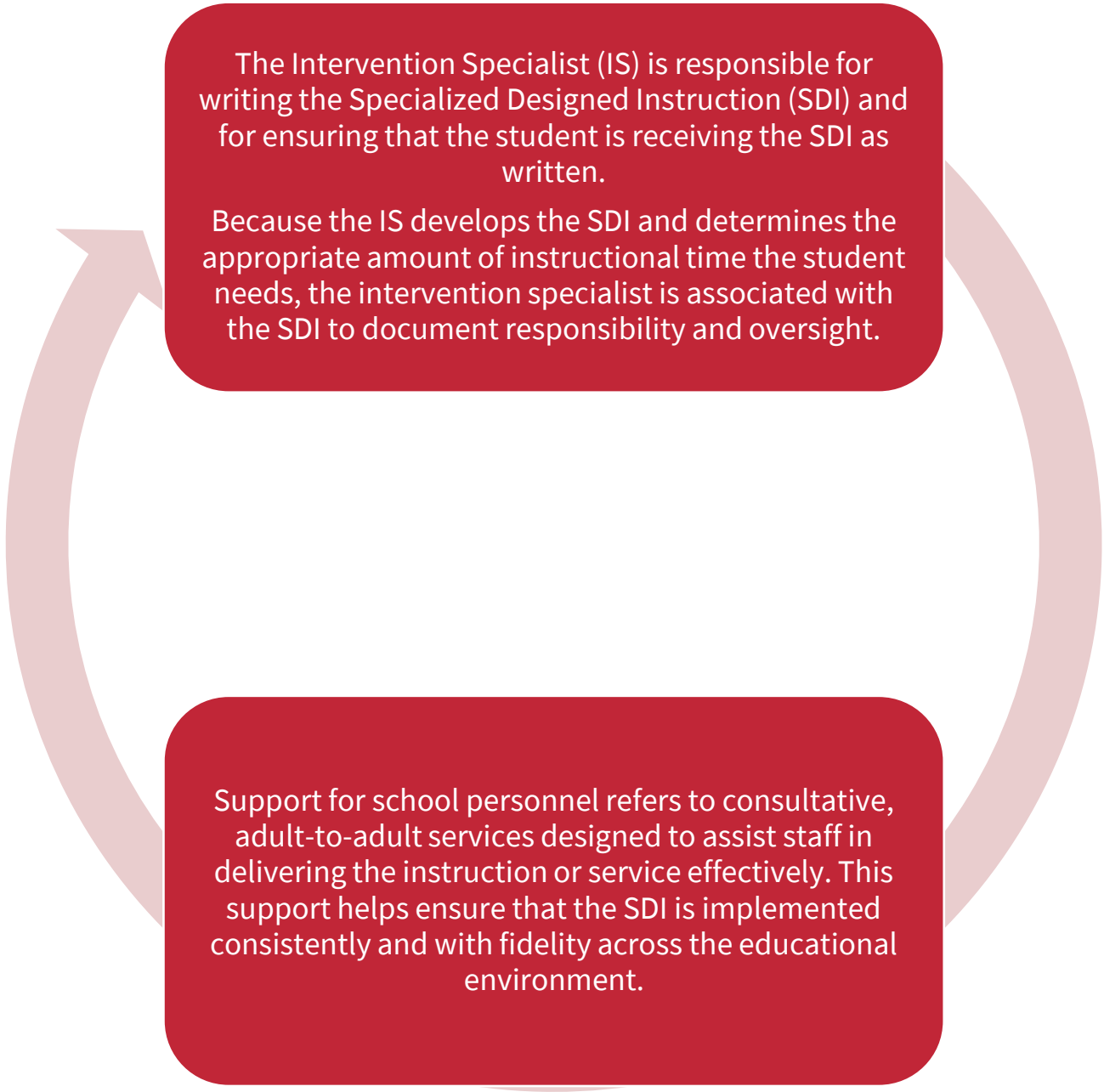
LOCAL POLICIES AND PRACTICES CONT.

Examples to consider

- What do you want the IEP team to review when they are considering someone else other than the IS or related service provider to deliver the SDI?
- Do you have requirements for PR-01?
- Is there an expectation for how long or how frequent that your educational agency would like to have the 2 staff members interacting to ensure that the SDI being delivered is allowing the student to make progress.
- How should this be documented?
- How frequent should progress notes be turned over to the IS who is ultimately responsible for ensuring that the goals are allowing educational benefit for the student.
- Is the IS required to initial those progress notes to ensure that they have been reviewed?

CONSULTATION

Consultation between the intervention specialist or related service provider and the direct service provider (who is most qualified to deliver the SDI) must occur to ensure the SDI is implemented collaboratively and with fidelity.



Example: Writing reading specialist into the SDI on current form.

SPECIALLY DESIGNED INSTRUCTION				
Specially Designed Decoding instrusction provided here.		2	Intervention Specialist	Location where the student will receive thir SDI instruction; General Education Classroom, Resource Room, Intervention Period
BEGIN: Sep 22, 2022	END: Sep 21, 2023	AMOUNT OF TIME: 30 minutes		FREQUENCY: Weekly

SUPPORT FOR SCHOOL PERSONNEL	
The Reading Specilist will consult (weekly for 15 minutes) with the Intervention Specialist while the Reading Specilist delivers goal 2 listed in the students IEP, focusing on decoding skills.	
BEGIN: Sep 22, 2022	END: Sep 21, 2023

We would also look at the PR-01 to see how to IEP team concluded that the Reading Specialist (in the above example) would be the person most qualified person to deliver the students SDI.

SDI DELIVERY

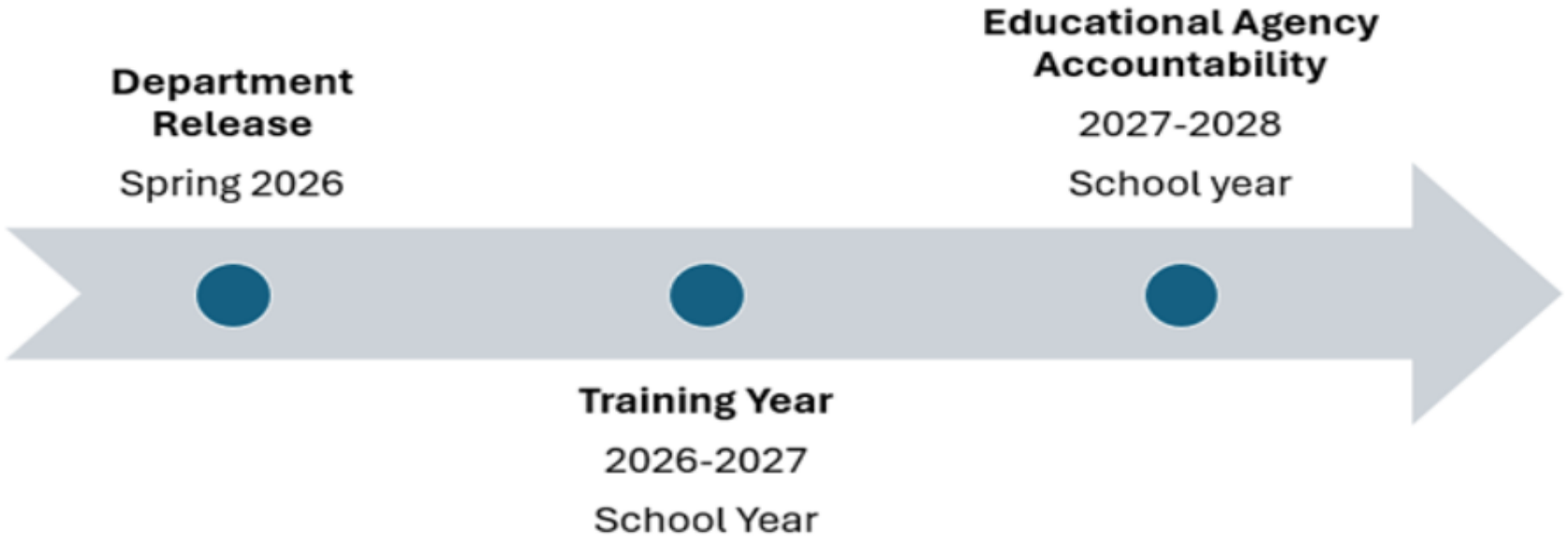
The IEP team makes the decision about who will deliver SDI based on the unique needs of the student and the content-level expertise of the qualified personnel (General education teachers or other experts in their fields)

- *The PR 01 is designed to reflect the team's decision about who is most qualified to deliver SDI, and the "Supports for School Personnel" section further clarifies the specific goal and who will be providing support to the student. When the IEP team identifies a provider who is more qualified to deliver SDI, the Intervention Specialist should no longer be the person delivering that instruction.*

FORMS TIMELINE

UPDATED REQUIRED AND OPTIONAL FORMS

ROLL-OUT AND TRAINING PLAN



DURING THE 2026-2027 SCHOOL YEAR, THE DEPARTMENT WILL OFFER A VARIETY OF TRAINING OPPORTUNITIES FOR EDUCATIONAL AGENCIES TO BECOME FAMILIAR WITH THE UPDATED REQUIRED AND OPTIONAL FORMS. SOME OPTIONS WILL BE:

- Regional in-person trainings
- Webinars
- Office hours
- Supports from statewide associations and organizations

FORMS IMPLICATIONS

The new IEP forms will provide additional clarity on this requirement.

The monitoring guide will be updated once the new forms are finalized; this process has not yet begun. Both the current guide and the updated guide will be posted online for educational agencies to reference. Accountability for schools will not begin until the 2027–2028 school year.

The LMS modules, and potentially the operating standards, will need to be updated to reflect these changes; however, there is currently no timeline available for when educational agencies can expect access to these updates.

WORKLOAD AND CASELOAD

WORKLOAD

- All educational agencies are required to implement a workload process
- It must consider:
  - All areas of service provided to children with and without disabilities, including, but not limited to school duties, staff meetings, professional development, supervisions, travel/transitions, screening, assessment, evaluation, progress documentation and reporting, secondary transition service planning, conferencing/consultation collaborative planning, documentation for individual students, and third-party billing requirements.
  - Services for children with disabilities will be based on the unique needs of the individual child and will take into consideration the severity of each child's need, and the level and frequency of services necessary to provide a free and appropriate public education.
  - Time needed for planning in accordance with rule 3301-35-05 of the Administrative Code including statutory and/or contractual agreements applicable to the educational agency.

WORKLOAD CALCULATOR EXAMPLE

Caseload Calculator For Preschool and School-aged Service Providers Serving Mixed Caseloads

Determine your weighted caseload by filling in the table that corresponds to your profession. Ensure that you do not exceed the maximum caseload you are permitted to carry by Ohio Administrative Code 3301-51-09(I)(2-3). This calculator should only be used by providers with **mixed** caseloads.

SLP	
Disability Category: School-aged	Number of Children with Disabilities
MD	
Deaf/Blind	
Deafness	
Hearing Impairment	
Visual Impairment	
Speech-Language	
Orthopedic Handicap	
Emotional Disturbance	
Intellectual Disability	
Specific Learning Disability	
Autism	
TBI	
Other Health Impairment	
Any Disability Category: PreK-aged	
Weighted Caseload	0

School Psychologist	
Age Category	Number of Children with Disabilities
School-aged	
PreK-aged	
Weighted Caseload	0

Audiologist	
Age Category	Number of Children with Disabilities
School-aged	
PreK-aged	
Weighted Caseload	0

Occupational Therapist	
Age Category	Number of Children with Disabilities
School-aged	
PreK-aged	
Weighted Caseload	0

Physical Therapist	
Age Category	Number of Children with Disabilities
School-aged	
PreK-aged	
Weighted Caseload	0

Orientation/Mobility Instructor	
Age Category	Number of Children with Disabilities
School-aged	
PreK-aged	
Weighted Caseload	0

Intervention Specialist Serving Children in Both School/Grade Level Categories			
Education Level	Disability Category	Enter Number of Children: Case Coordination	Enter Number of Children: Specially Designed Instruction per Instructional Period
Grade Level : Elementary, Middle or Junior High	ID		
	SLD		
	Multiple Categories		
	All Other Categories		
Grade Level: High School	All Categories		
Weighted Caseload		0	0

https://education.ohio.gov/Topics/Special-Education/Service-Provider-Ratio-and-Workload-Calculation

CASELOAD NUMBERS

- **Intellectual Disability**-16/24
  - 12/16 per instructional period
- **Specific Learning Disability**-16/24
  - 12 per instructional period
- **Hearing Impairment-**10
  - 8 per instructional period
- **Visual Impairment**-10
  - 8 per instructional period
- **Orthopedic Impairment**-10
  - 8 per instructional period
- **Other Health Impairment**-10
  - 8 per instructional period
- **Emotional Disability**-12
  - 10 per instructional period
- **Multiple Disability**-8
- **Autism**-6
- **Deafblind**-6
- **Traumatic Brain Injury**-6

SERVING MULTIPLE CATEGORIES

- 16 students in elementary, middle, or junior high school
- 24 high school students
- Must be properly certified to teach the students
- Must not exceed previous caseload limits for each category on the caseload
    - ex: no more than 6 students with Autism

AGE-RANGE

60-MONTH AGE-RANGE

- Intellectual disability
- Specific Learning Disabilities
- Multiple Disability
- Autism
- Deafblind
- Traumatic Brain Injury
- Multiple categories

48-MONTH AGE-RANGE

- Hearing Impairment
- Visual Impairment
- Orthopedic Impairment
- Other Health Impairment
- Emotional Disturbance

OHIO ADMINISTRATIVE CODE 3301-51-09(K):

1) If an educational agency exceeds the workload requirements in paragraph (I) of this rule a waiver request must be filed with the Ohio department of education, office for exceptional children. An educational agency may be granted a waiver for individual service provider limits or for age-range per instructional period as required by this rule.

(2) Requests must be submitted in writing to the Ohio department of education, office for exceptional children or office of early learning and school readiness. The written request shall include, but not be limited to, the following:

(a) Identification of the specific rule for which a waiver is being requested;

(b) Specific period of time for which the waiver is requested; and

(c) Rationale for the request.

WAIVER TYPES

- Caseload
- Age Range
- Related service caseloads

PURPOSE OF THE WAIVER

Informs the Department that you are out of compliance with the Ohio Administrative Code

To create a plan to come into compliance before the start of the next school year

WAIVER BASICS

Waivers include a plan of action to ensure that your district comes into compliance for the next school year.

Waivers are for a classroom, not a particular student

A teacher can still provide FAPE to all students if granted a waiver

Cannot ask for a waiver for workload

A WAIVER…

- **Cannot be** requested if the teacher is over their workload
- **Does not** bring you into compliance with the Ohio Operating Standards for the Education of Children with Disabilities.
- **Does not** stop a parent from filing a complaint against an educational agency
- **Cannot be** used for a substitute teacher (education unlimited are the only substitutes that can provide SDI, if substituting for a licensed intervention specialist)

TEACHER LICENSURE

INTERVENTION SPECIALIST

Requirements:

- Bachelor's degree (minimum)
- OAE Test
- Background check

Types of licenses

- Hearing impaired (PreK-12)
- Gifted (K-12)
- Mild/Moderate Needs (K-12)
- Moderate/Intensive Needs (K-12)
- Primary Intervention Specialist (Prek-5)
- Visually Impaired (Prek-12)

SUBSTITUTE LICENSURE

Temporary Non-Bachelor's Degree Substitute Teaching License

Standard Substitute Teaching License

Education degree	Subject area degree	Other degree

Career-Technical Workforce Development (CTWD Areas)

EDUCATIONAL AIDE PERMIT

- 1 year or 4 year
- Must have high school diploma or equivalent

https://sboe.ohio.gov/educator-licensure/apply-for-a-new-license/educational-aide+and-student-monitor-permits

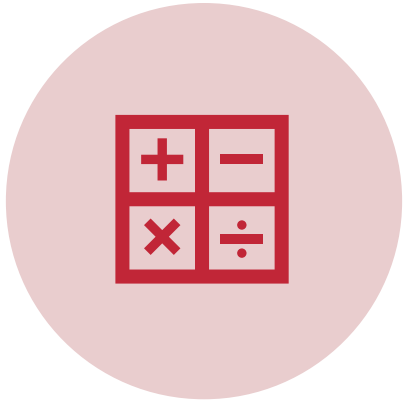
WHO CAN PROVIDE SDI?

Most qualified individual based on the individual needs of a student and licensing

Team decision

REAL WORLD EXAMPLES OF SDI

LITERACY- DYSLEXIA



MATH- ALGEBRA

LIFE SKILLS – BRUSHING TEETH

NEXT STEPS

Ensure: proper certification and qualification, ensure IEP team considers all requirements, ensure the selection is so that students are being taught by the most qualified individual.

Ensure identified educator is not intended to reduce the number of intervention specialists or the use of substitutes.

We will have more guidance coming out next year.

SESSION EVALUATION

https://forms.cloud.microsoft/g/MaWt99JNtR

CONTACT INFORMATION

- **Ohio Education Association**
  - **Daria DeNoia, M.Ed.**, NBCT, IIRP Facilitator (she/her), Education Policy and Practice Consultant
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- **Ohio Federation of Teachers**
  - **Rebecca Baum** M.S. CCC-SLP (she/her), Director of Professional Issues
  - (607) 279-7919
  - rbaum@oft-aft.org

- **Office for Exceptional Children**
  - Exceptionalchildren@education.ohio.gov

QUESTIONS?

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