

**WANZENBERG & ASSOCIATES**  
EDUCATIONAL CONSULTANTS

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**Client Information Packet**

**Section I. (Student Information)**

Date:	
Student's Name:	
Date of Birth:	
School (District):	
Best weekly avail. (days/times)	
Grade:	

**Section II. (Parent/Guardian Information)**

Parent/Guardian's full name:	
Address:	
City:	
Zip Code:	
Home Phone:	
Work Phone:	
Email address:	
Contact preference (email, cell, home, work, etc.):	

**Section III. (Misc.)**

Referred by:	
Medical Diagnosis (list all):	

Hospitalizations, if any:	
Last IEP:	
Last Re-Evaluation:	
Evaluation due date:	
My child is currently in the process of an evaluation (Y/N):	
My child currently has a support plan at his/her school (eg, IEP or 504 Plan):	
If yes, what is the primary eligibility?	
If yes, what is the secondary eligibility?	
What is the official placement listed on the most current IEP?	
What related services does your child receive?	
What services and or activities are provided by the family to support your child's disability (e.g., tutoring, outside counseling, etc.)?	
What significant disciplinary issues has your child experienced in school?	
Does your child have a behavior support plan or functional analysis of behavior?	
Has your child ever been suspended?	
If yes, for what and for how long?	

**Section IV. (School Contact)**

School providing IEP services:	
Address:	
City:	
Zip:	
Phone:	
Your school contact (casemanager, IEP coordinator, Principal, etc):	
If your child attends a separate school (other than that which provides the IEP services such as a day school or residential program), please list that information here:	

**Section V. (Overview of Executive Skills Deficits):**

Please explain your current concerns regarding Executive Functioning needs:	
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What are your student's  
interests?

**FORM 2.1**

**Executive Skills Semistructured Interview—Parent Version**

Many youngsters have problems in school or with homework not because they lack intelligence but because they have weak executive skills. These refer to the skills required to plan/prioritize (P) and carry out tasks, including time management (TM), working memory (WM), the ability to organize tasks and materials (O), task initiation (TI) and follow-through, flexibility (F), response inhibition (RI), emotional control (EC), sustained attention (SA), goal-directed persistence (GDP), and metacognition (M). I'm going to ask you some questions about \_\_\_\_\_ (fill in the child's name) to help us get a clearer understanding of his or her executive skills. Codes in parentheses refer to the specific executive skill measured by each item.

**HOMEWORK.** Which of the following areas, if any, does your child have difficulty with?

Item	Not a Problem	Notes
Understanding homework directions (M)		
Getting started on his or her own (TI)		
Being able to keep working despite distractions (SA)		
Asking for help when it's needed (M)		
Sticking with it long enough to complete it (SA, GDP)		
Making careless mistakes; failing to check work (M)		
Finishing the work on time (TM)		
Remembering to hand it in (WM)		

Are there some subjects or kinds of assignments your child is more likely than others to complete successfully?

More likely to be successful with . . .	Less likely to be successful with . . .

*(cont.)*

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**Executive Skills Semistructured Interview—Parent Version (page 2 of 4)**

**ORGANIZATION OF MATERIALS.** Which of the following areas, if any, does your child have difficulty with?

Item	Not a Problem	Notes
Keeping notebooks and papers organized (O)		
Keeping desk tidy (O)		
Keeping belongings neat and in appropriate locations (e.g., gym clothes, coats, hats, mittens) (O)		
Keeping track of books, papers, pencils, etc. (O)		
Keeping backpack organized (O)		

**LONG-TERM PROJECTS.** Which of the following areas, if any, does your child have difficulty with?

Item	Not a Problem	Notes
Deciding on a topic (P)		
Breaking the assignment into smaller parts (P)		
Developing a timeline (P)		
Following a timeline (TM)		
Estimating how long it will take to finish (TM)		
Following directions carefully (WM, M)		
Proofreading or checking project to catch mistakes to make sure the rules were followed (M)		
Finishing the project by the deadline (GDP)		

*(cont.)*

**Executive Skills Semistructured Interview—Parent Version (page 3 of 4)**

**REMEMBERING.** Which of the following areas, if any, does your child have difficulty with?

Item	Not a Problem	Notes
Writing down assignments (WM)		
Bringing home appropriate materials (e.g., books, workbooks, assignment book, worksheets, notices, permission slips, gym clothes) (WM)		
Bringing to school appropriate materials (see examples above) (WM)		
Remembering instructional sequences after normal instruction (e.g., long division, proper headings for papers) (WM)		
Remembering to perform chores or other household responsibilities (WM)		
Losing things within the home, yard, or neighborhood (WM)		

**PROBLEM SOLVING.** Which of the following areas, if any, does your child have difficulty with?

Item	Not a Problem	Notes
Recognizing that he or she has a problem (e.g., doesn't understand the directions) (M)		
Being able to think flexibly about the problem (e.g., not get stuck on one approach or solution) (F)		
Trying to solve the problem first on his or her own before going for help (M)		
Accessing appropriate resources to help him or her solve the problem (F)		
Evaluating his or her own performance to know whether the problem was solved successfully (M)		

*(cont.)*

**Executive Skills Semistructured Interview—Parent Version (page 4 of 4)**

**SELF-CONTROL.** Some youngsters have difficulty managing their behavior. Which of the following areas, if any, does your child have difficulty with?

Item	Not a Problem	Notes
Becoming easily upset (EC)		
Throwing temper tantrums (EC)		
Acting impulsively, either verbally or physically (e.g., provoking siblings) (RI)		
Interrupting others (RI)		
Difficulty waiting turn (RI)		

**PARENTAL EXECUTIVE SKILLS.** Do you see yourself as having challenges in any of the areas we've talked about? If so, in which areas?

Can you envision other problems with starting or following a plan? How or by whom could these problems be managed?