**ISF Implementation Workbook**

**V2 August 2017**

**Perales, K., Pohlman, K., VanAcker, E., Barrett, S., and Eber, L., 2017**

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| **Teaming in an Interconnected System** |

Teaming has become a way of working within schools and teaming is a critical feature within PBIS. ISF expands teaming to include community, family, and youth representatives, and school and community mental health providers. This expansion broadens the team’s views in considering student mental health and behavioral concerns and provides teams with additional resources to addressing typical intervention barriers (Barett et al., 2013). Family and community members need to serve as true parent roles on teams, which means they should not be paid by the district or there is a conflict of interest in their role as a family or community member.

Multi-leveled teams should include representative stakeholders from the educational system. ISF expands this team membership to include stakeholders from mental health systems. All multileveled teams should include leadership from both educational and mental health systems with decision-making authority. See table 1 below for illustrations of potential members for teams.

**Building Level Tier 1 Team**

Tier 1 Team refers to a multi-disciplinary team with the primary focus of all students, all staff, and all settings. The goal of this team is prevention and early identification of student need. This team develops decision rules for identifying when and how a student receives additional interventions. All school and community data are reviewed by this team.

**Building Level Tier 2 Systems Team**

Tier 2 Building System Team refers to a multi-disciplinary team with the primary focus of coordinating and monitoring the progress of all students who need additional intervention beyond Tier 1. Students would be identified through data decision rules and/or referral from student, family, or staff. This team would review how many interventions are in place, how many students are in each intervention, and how many of those students are responding.

**Building Level Tier 3 Systems Team**

Tier 3 Building System Team refers to a multi-disciplinary team with the primary focus of all students in the building who need individual intervention. This team would coordinate intervention for all students receiving individual intervention, monitor the number of students receiving individual interventions and evaluate how many are responding.

**Team Membership:**

At each Tier, a multi-disciplinary team that actively participates in regularly scheduled meetings is imperative for a successful implementation. The table below illustrates potential members of these teams. Note that in some school buildings there is one team that discusses each tiered system.

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| **Building Level Tier I Team** | **Building Level Tier II Team** | **Building Level Tier III Team** |
| Building Principal\* | Building Principal\* | Building Principal\* |
| Clinician\* | Clinician | Clinician |
| Family Member(s) | Family Member(s) | Family Member(s) |
| Student(s) | Student(s) | Student(s) |
| Regular Education Teachers representing all grades/content areas | Regular Education Teacher(s) representing grades/content areas | Regular Education Teacher |
| Special Education Teachers representing academics and behavior | Special Education Teacher(s) with specific expertise in social/emotional/behavior | Special Education Teacher |
| Other support staff in building such as nurse, counselor, etc. | Nurse | Nurse when appropriate |
| Consideration for other supports such as cafeteria worker, custodian, building secretary | School counselor, social worker, and/or psychologist | School counselor, social worker, and/or psychologist |

\*or designee

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| **Team Composition Guiding Questions:** |

**Activity: Team Inventory**

**What multi-leveled teams already exist in your building?**

Use the descriptions of building level teams above to determine which teams exist in the building. The conversation that occurs at this team is the important focus and not the team name. Meaning you need to consider if the conversations occur and if so, what team has that conversation.

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|  | **In Place, Partially In Place, Not in Place** | **Identify team where conversation occurs (i.e.: Universal Team, Student Assistance Team, etc)** |
| **Building Level Tier 1 Conversation**   * Reviewing schoolwide and community data * Implementing and monitoring school-wide interventions |  |  |
| **Building Level Tier 2 Systems Conversation**   * Identifying, implementing and monitoring tier 2 interventions |  |  |
| **Building Level Tier 3 Systems Conversation**   * Identifying, implementing and monitoring tier 3 interventions |  |  |
| **Building Level Problem Solving Team**   * Standing team of both education and community partners * Uses FBA-BIP process to guide problem solving |  |  |
| **Building Level Individual Student Team**   * Team composed of members identified by family/student * Developing, implementing and monitoring individual student action plans |  |  |

**Do you have overlap in your teams?**

If you are finding you have multiple teams that may focus on components of these conversations, it may be helpful to take an inventory of current teams, their goals, and intended outcomes to help streamline our work. The  [*Working Smarter, Not Harder*](https://docs.google.com/document/d/1Qe34pkCi0KKEy-oXkN-M8TXT0MtKtJdoI2xYm_SLGtU/edit) matrix will support your team through this process.

**Activity: Team Membership Inventory**

Refer to the **team membership** table on previous page and use table below to identify

* 1. Stakeholders currently represented on each team
  2. Stakeholders need to be added
  3. A plan for enrolling each team member

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| --- | --- | --- | --- |
| **Team** | **Current Team Members** | **Need to add** | **Plan for adding team member and removing barriers (who, what, when)** |
| **Building Level Tier 1 Team** |  |  |  |
| **Building Level Tier 2 Team** |  |  |  |
| **Building Level Tier 3 Team** |  |  |  |

**For more on family representation on teams, see** [**Youth and Family Engagement section**](#26in1rg)**.**

**Resources:**

*Joni W. Splett, Kelly Perales, Colleen A. Halliday-Boykins, Callie E. Gilchrest, Nicole Gibson & Mark D. Weist (2017):* [*Best Practices for Teaming and Collaboration in the Interconnected Systems Framework*](https://drive.google.com/open?id=0B9rpal09Nt5HVXM3SjBkLXJDUXc)*, Journal of Applied School Psychology, DOI: 10.1080/15377903.2017.1328625*

**Webinars:**

[Overview](https://midwestpbis.adobeconnect.com/p3309ct7llf/?launcher=false&fcsContent=true&pbMode=normal) of teaming in interconnected system

[Example](https://midwestpbis.adobeconnect.com/p22hvt9llgg/?launcher=false&fcsContent=true&pbMode=normal) of teaming structure (Sandoval CUSD 501) and using teaming to select interventions (Placer County California)

In addition to team membership, operating procedures are critical to facilitate successful collaboration on ISF teams and improve intended student and school outcomes. To be effective, teams need to meet on a regular basis, have an agenda, keep minutes, have defined meeting roles, and develop and monitor action plans.

**Meeting Schedule:**

It is recommended that building teams meet at least monthly.

**Agenda:**

All team agendas should allocate time for:

* follow-up on previous action items to monitor outcomes
* review of current data
* problem-solving around new data
* discussion of general issues
* brief assessment of meeting

**Meeting Minutes and Action Plan:**

Effective teams have a defined process for minutes and sharing of minutes. Accurate minutes provides a record for both those present and not in attendance. In addition to minutes, effective teams utilize an action plan that tracks: action item, who is completing, by when and follow-up. Teams working within an integrated system utilize an integrated action plan that incorporates goals and action steps from both school and community partners.

**Role of team members:**

**Facilitator**- The facilitator ensures that the group moves smoothly through the task at hand. This person seeks information and opinions, asks for facts and feelings from each team member, and summarizes main points of discussion. This role is very important because the facilitator leads the group through the task.

**Recorder/Minute Taker**- The recorder writes down the work of the group. This can involve writing words or sentences, drawing pictures, or simply taking notes of an activity. This role is very important because it is necessary to keep a record of the work done.

**Time Keeper** - This person is responsible for keeping up with the time. It is very important that the group is aware of how much time they have to complete the task as well as reminders on when the time is growing short.

**Reporter/Communicator-** This person is responsible for reporting back the work of their small group to the presenter or to the larger group. This role is very important because this communication to the large group will be crucial in the learning process.

**Data Analyst-** This person should have ready access to available school data, including, but not limited to discipline information, etc. This role is important because data drives problem solving and decision-making.

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| **Team Operating Procedures Guiding Questions:** |

This planning section is meant for individual building teams to assess and improve their team functioning. Each team (e.g.: Tier 1, Tier 2, Tier 3, etc) would need to establish clear operating procedures.

**Activity: Team Composition and Roles**

Identify your team members.

**Step 1:** Complete the following chart to ensure that your team includes a Tier I school-based coach, a school administrator, a family member, and individuals able to provide: behavioral expertise, coaching expertise, knowledge of student academic and behavioral patterns, knowledge about the operations of the school across grade levels; and student representation.

**Step 2:** Identify who will be the Data Entry person, the Data Analyst, the Facilitator, and Minute Taker for the TIPS process. Identify back-ups for each role.

**Step 3:** Determine dates to meet (at least monthly) and dates to present to the faculty (share data at least quarterly).

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| **Name** | **Role** | **Back-Up** | **Email** | **Phone #** |
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| **Day to meet:** | | | **Time:** | |
| **Location:** | | | | |
| **Dates to present to faculty:** | | | | |

**Establishing meeting agenda and procedures**

[Team Initiated Problem Solving](https://www.pbis.org/training/tips) is a model your team may consider. TIPS helps set practical procedures and utilize data in decision making.

The [TIPS Meeting Minute Form](https://docs.google.com/document/d/1EEsHmyhWeleDv4vu4M381P98-PD6D8GYowSlWuvSG6U/edit) provides a consistent format for agenda and notes at each meeting. Your team meeting agenda should expand to include mental health topics and include

\*You may review the [TIPS Meeting Agenda](https://docs.google.com/document/d/1kTnCoDc0HdlsHA18MzLPbAn5dSNi4z3FSqAgwOI11HQ/edit) for an example.

1. How will team members add items to agenda?
2. What process will the recorder use for taking minutes and sharing the minutes?

**Develop integrated action plan:**

The multidisciplinary team develops an integrated action plan that addresses shared goals with input from all stakeholders across tiers. Goals should reflect objectives that lead to implementation of ISF with fidelity across tiers. Goals should be specific, measurable, attainable, relevant, and timely (SMART). Key elements to include within the action plan are timelines and persons responsible. This manual provides opportunities to identify goals within each section. A team should reasonably select only three to five goals to address at a time.

See an example of an  [Action Plan Template](https://docs.google.com/document/d/1dL3yY1Gvg0heH6kT1K-wvwILDyFT51ZldFZrCEorV1s/edit) and example of an  [Integrated Action Plan](https://docs.google.com/document/d/1k57jkkj6hzzpX765IAVtr9K7YdeFye7EbENbf5IoMNI/edit).

**Establish a timeline and procedures sharing minutes and action plan.** (e.g.: live Google Doc, Communicator will share within 24 hours of meeting, etc)

**Activity: Identify Process for Agenda, Notes, and Action Planning**

Use the materials above and consider processes you already have in place to identify:

**Agenda:** Format you will use. How will team members add items? Who will send out prior to meetings?

**Notes:** Format you will use. Who will take notes during meeting? Who is back-up? Will you project notes or have a way for team to follow during meeting? Who will share notes after meeting?

**Action Planning:** Format you will use. Who will document action steps during meeting?

 **Remember to document action steps from this section on your Integrated Action Plan**