

**CONSULTATIVE AND PROGRAM PLACEMENT TEAM:
A PREREFERRAL INTERVENTION SYSTEM**

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CHAPTER ONE
INTRODUCTION

Teachers are particularly interested in assisting with decisions that directly involve the students that they teach. There are myriad possibilities for how this might be accomplished. However, the objective of this project is not to identify all the various decision-making alternatives that empower teachers but rather to look closely at one particular avenue of collaborative decision-making that directly affects teachers and indirectly affects their students. This particular model has been labelled the Consultative and Program Placement Team (CPPT) and was conceived and developed by this author in collaboration with the three other members of "the team" (John Loree, Pat McKenzie, Don Dawson) and piloted during the 1987-88 school year at Nicholas Sheran Community School in Lethbridge, Alberta. (The CPPT continues to operate at Nicholas Sheran Community School and has been used as a model for similar "teams" in most other Lethbridge Public Elementary Schools.)

There are many justifications for establishing CPPTs. It is appropriate at the onset of this project to simply state them as follows:

a. It is imperative to find more and better ways to utilize the strength of teachers. Collectively teachers have the knowledge and attitudes that allow them to solve almost any school problem that comes their way. When teachers are given time to work together they can cooperatively solve problems, help one another and collectively

take responsibility for what happens in the school. Unfortunately there is not always a vehicle in place that will allow teachers to take advantage of their collective problem solving abilities.

b. Those most closely affected by decisions should have a major role in making them. Changes are most effective when carried out by people who feel a sense of ownership of them. As long as teachers are adequately valued as participants, they are apt to perform with the necessary assurance and authority to do the job the best they can.

c. The CPPT will provide on-going professional development for teachers and administrators. Teaching is often a very isolating profession and teachers can be unaware of what is happening in their colleagues' classrooms. We must make an effort to help teachers view their school as a collective entity; a community. Opportunities for collegial interaction may assist in diminishing isolation in teaching and fostering the community identity. As well, far too many teachers are limited by their own experiences and training and never given the opportunity to share professionally with their colleagues. Teachers must be enabled to cooperate with one another and to gain support for trying new and perhaps more effective teaching techniques and strategies.

d. Staff morale and cohesiveness will be strengthened by resolving individual staff concerns through the use of the CPPT process. When individuals come together to solve problems a natural bonding will take place and the climate of the school will be enhanced. In addition, teachers will be excited about the opportunities to share in problem solving and this will boost staff morale.

e. A collaborative decision-making model will improve

communication and support networks among all the stakeholders. When everyone comes together to hear the same thing at the same time communication will be improved. Too often in the hectic lives of teachers, they catch bits and pieces of conversations that are supposed to guide them in making important decisions about the way they teach. Very seldom do teachers have the opportunity to sit down with one another as professionals in order to discuss a concern and seek a resolution.

f. Teachers need and want an in-school system of support. All schools are faced with more and more students who need special assistance. There are so many students who have social, emotional, physical and academic problems. Teachers, in an effort to provide children with an education in what is perceived to be the "least restrictive environment"; namely, the regular classroom, are trying their best to educate these children.

Sometimes these teachers feel that they are alone in their concern for these students. This interactive process with colleagues will provide an opportunity to change this perception because the individual teacher's concern will become the team's concern.

g. Shared decision-making is beneficial to administrators. If a school administrator is to have any energy left, she or he had better do some leadership sharing. Principals cannot perform every necessary function without help. Problems are typically so complex and so ambiguous that to define and resolve them requires the knowledge and participation of more than just the administrator. Refusal to share problem-solving is not only a vote of non-confidence in teachers as valuable decision-makers but it is also abusive to administrators who have more on their plates than it is possible to effectively address.

A spin-off to team problem solving for the administrators is increased trust by teachers. Administrators working with teachers in a team approach prevents a "we/they" attitude and moves both groups to a cooperative approach that better meets their needs and their students' needs.

h. Special education programs have been faced with increasing regulations, pressures for external consultation, and demands for admissions. A collaborative team approach can expeditiously meet those needs with a minimum of red tape and ensure that the school's available resources are utilized in the most effective manner.

i. There is a need to be more selective about when to do psychological assessment. All too often teachers and parents are requesting the screening services of the psychologist as a first step of the process rather than looking at other alternatives first.

j. Concerns for students must be perceived as "home/school/community" rather than home or school or community. A consultative process will foster and enhance the cohesiveness and support of stakeholders in the child's development by bringing them together as advocates for the child (and for one another).

Interestingly enough, the CPPT model was developed without the corroboration of the research literature that this author has found and included in chapter two of this project. The CPPT went about establishing itself only to find that similar models had been introduced in some school jurisdictions in the United States. Those other models, (eg. Walsh, 1989; Fuchs, 1987; Fuchs, 1989; Chalfant, Pysh & Moultrie, 1979) are most commonly referred to in the research literature as Prereferral Intervention Programs.

This project then, will focus on the following: a study of Prereferral Intervention Systems; the establishment of the Consultative and Program Placement guidelines; and the evaluation of the CPPT model and guidelines.

CHAPTER TWO
PREREFERRAL INTERVENTION

Prereferral intervention refers to the systematic provision and documentation of interventions within the regular classroom setting prior to referral for special education assessment and decision-making (Graden, Casey & Christenson, 1985). The approach is based on an indirect, collaborative model of service delivery in which resources are directed at providing intervention assistance at the classroom level. It was created in part, to avoid the lockstep referral-to-special education placement discussed by Ysseldyke, Algonzzine & Epps (1983).

Prereferral intervention typically is categorized in two ways: (a) informal, school-based, problem solving teams (for example, Teacher Assistance Teams as developed by Chalfant, Pysh & Moultrie, 1979); and (b) consultation on the part of special education teachers (Graden, Casey & Christenson, 1985). It is important at this time to look at the two approaches.

Informal Problem-Solving Teams

As a form of prereferral activity, informal problem-solving teams are known by a variety of names that include concepts of support (school support teams), assistance (teacher assistance teams, school assistance teams, or building assistance teams) and appraisal (school appraisal teams). Such teams are meant to serve two basic purposes according to Pugach & Johnson (1989). "First, they can provide

immediate informal assistance to teachers as a means of solving mild learning and behavior problems in the classroom. Second, they can serve as a screening mechanism for determining which referrals should be forwarded formally for a full evaluation" (p.219). Such teams are school based, typically have permanent membership, and meet on a regularly scheduled basis. Team membership is commonly based on the concept of multidisciplinary representation where, within a true collegial atmosphere, it is possible that all education professionals within a school would be consultants for each other at one time or another. This type of collaboration is what Goodlad (1984) appears to have had in mind as he encouraged the development of teacher-to-teacher dialogue as a basic form of professional activity in the schools. However, there are several requisite skills that the team members must hold in order to successfully implement this type of service delivery mode. Curtis, Zins & Graden (1985) say that the team members must "demonstrate expertise in problem solving" (p. 11). Team members must be able to identify, clarify, analyze and evaluate problems. They also say that they must be able to "demonstrate both knowledge and skills regarding effective communication and the development and maintenance of positive working relationships. Skills such as listening and questioning - combined with the conveyance of empathy, genuineness and nonpossessive warmth - are essential to the interpersonal process" (p. 11-12). Garcia & Ortiz (1988) purport that the key to the success of this team work is "the quality of the brainstorming and of the strategy selections" (p.3) These require that the team members understand effective teaching, children's development and behavior management as well as "the student populations they serve so that instructional recommendations are appropriate to the

needs and background characteristics of students" (p. 3). Curtis & Meyers (1984) would add "an understanding of systems theory (understanding the process of change, understanding systems variables in classrooms, schools, etc. that have an impact on the referral problem)" (p. 79).

One example of the informal problem solving team is the Teacher Assistance Team (TAT) developed by Chalfant, Pysh & Moultrie (1979). The TAT is a teacher-support system that consists of a peer problem-solving group of three elected teachers. The team works with the referring classroom teacher who made the referral and, in some cases, with the parents, to develop programs for students who are exhibiting learning and/or behavioral problems. The Teacher Assistance Team and the referring teacher meet together to discuss problems which are becoming apparent, brainstorm possible solutions, and develop an action plan which is then implemented by the referring teacher with the support of team members. The team conducts follow-up meetings to evaluate the effectiveness of the proposed interventions and to develop other instructional recommendations if necessary. Unlike some of the other referral committees, Teacher Assistance Teams do not involve special education personnel except when they are invited to serve as consultants to the committee. This structure emphasizes that the TAT is under the authority and is the responsibility of the regular teachers. According to Garcia & Ortiz (1988) there are several benefits to the use of TAT. "Teachers are provided with a day-to-day peer problem-solving unit within their school building and thus do not have to experience long delays until external support can be provided" (p. 2). As well, they point out the benefits of "continuous staff

development focussed on management of instruction and students for all persons involved" (p. 2). And finally, there is a reduction in the number of inappropriate referrals to special education because most of the problems are taken care of by the regular classroom teachers.

Consultation

Consultation is another method of prereferral intervention. Although the specific processes of consultation vary, all are similar in that the special education teacher or the school psychologist provides one-to-one consultation services to classroom teachers (Fuchs & Fuchs, 1988; Graden et al; 1985). The consultation approach to prereferral intervention is meant to provide more immediate service to classroom teachers in a less structured manner. This consultation is meant to be classroom based wherein classroom teachers work directly on the problem in a one-to-one relationship with the consultant. This moves special education services into a more interactive mode with general education. Proponents of consultation often use the term collaborative consultation to denote an equitable approach to consultation based on parity between special and general educators (Idol-Maestas & Ritter, 1985). The principle assumption underlying consultation is that of shared power and collaborative decision making (Meyers et al., 1979). Here consultation is not a hierarchical system, rather it is multidirectional. The consultant is viewed as a resource to the teacher with power being equal between the two. There is meant to be a "blending of skills to create greater problem-solving power" (p. 6). The consultant is cognizant of the fact the teacher has valuable knowledge about his or her classroom and students. Curtis,

Zins & Graden (1985) concur that this parity is an absolute necessity of a "genuinely collaborative relationship between the consultant and consultee for successful problem solving" (p. 100). The model assumes that the knowledge and skills of both participants are essential to the development and implementation of effective interventions. The consultee must be involved in every phase of the process and have the right to accept or reject potential strategies. Without this commitment, there is little likelihood that strategies will be effectively implemented.

One example of the consultation approach was developed by Graden (1985) as a multi-step prereferral intervention system. It includes identifying, defining, and clarifying problems; analyzing the components of the classroom ecology that affect the problem; designing and implementing interventions; and evaluating intervention effectiveness (p. 383). Graden, Casey & Bonstrom (1985) evaluated this prereferral model in six schools in a large suburban school district. They reported "mixed results," but "encouraging positive findings" in the areas of increased classroom consultation and decreased testing and placement rates (p. 493). Overall, they viewed the prereferral intervention model as effective to some degree in four of the six schools in increasing consultation, developing workable classroom interventions and decreasing special education placements.

Although there are definite differences between the team and consultant intervention plans there are also many commonalities. Firstly, they are both based on the principle of prevention. They are focused on preventing inappropriate placements in special education

and also on preventing future student problems by increasing the skills and knowledge of regular classroom teachers. Secondly, these intervention systems are based on an "ecological" principle (Graden, Casey & Christenson, 1985) which looks at students in the context of the classroom and all that this entails. It attempts to select appropriate educational interventions that are not focussed solely on the child (p.379). Essentially, a wide range of factors that affect student performance are considered rather than limiting the problem to the student alone or to home factors. As a result, the numerous factors that affect student learning and behavior are assessed, analyzed and taken into account in intervention planning. Thirdly, both these intervention programs are founded on the consultation model for services delivery (Gutkin & Curtis, 1982). Consultation involves the provision of indirect services to the student through assistance provided to his or her classroom teacher and/or parent(s). This approach, purports Curtis, Zins & Graden (1985), emphasizes "a major shift in the functions of special services personnel from assessment and placement activities to the development, implementation, and evaluation of interventions in the regular classroom" (p.7). Fourthly, both these models are based on the principle of teaching students in "the least restrictive environment" which is in keeping with the United States Public Law 94-142 (the 1975 Education for All Handicapped Children Act). This Act is one that utilizes the concept of teaching students in the regular classroom whenever possible. Fifthly, both intervention models use procedures for problem solving and intervention as the first stage in the special education process. Thus resources traditionally used to test and place large numbers of students are redirected toward providing assistance for students and

their teachers in the regular classroom, where the problems first arise. The goal is to implement strategies in the regular classroom and to evaluate the effectiveness of these strategies before a student is formally referred for consideration for special education placement. Basically, reveal Pugach & Johnson (1989), the process acknowledges the limitations of "the cumbersome and resource-intensive diagnostic and identification procedures" as they relate to labelling of students as learning disabled and redistributes money and attention to more immediate problem solving activities (p. 217). In addition, Curtis, Zin & Graden point out that in both prereferral approaches when the interventions do not succeed in the regular classroom, the functional assessment activities carried out during the process are likely to be highly valuable in subsequent decision-making development (p. 8). Sixthly, both approaches are consistent with some of the recommendations in proposals for reforming the organization and operation of schools. For example, the need for building-level responsibility shared among professionals in the schools as underscored by Goodlad (1984), consultation between teachers to reduce isolation that typically characterizes the work of many classroom teachers and the encouragement of collaborative problem-solving as characterized by collegial professional relationships (Carnegie Forum, 1986, p. 58).

Practical Considerations

Since change is not always immediately reinforcing there can be resistance to the prereferral model. Resistance or blockage can come from any level in an organization. A primary barrier according to the research of Walsh (1989) can be lack of administrative support. If the

school administrator does not encourage the use of the prereferral system or if he or she does not provide the necessary resources for implementation, chances for success are diminished. According to Curtis, Zinz & Graden (1985) administrative support includes "more than verbal agreement; it must be demonstrated in action" (p.20). Gutkin et al. (1980) also suggested several factors which typically presented obstacles to prereferral effort: resistance by regular classroom teachers due to the additional time and effort required by prereferral involvement and its focus on the classroom environment, not the student, for remedial attention; resistance by special educators due to the necessary change in role from direct service provider to consultant; concern of administrators that a reduction in numbers of identified students would result in decreased funding and resources; a general concern that there are limited options for instructional change in regular classrooms; and the belief that testing and special education placement benefits students. Walsh (1989) attempted to "verify the relationship of the above factors to the successful implementation of prereferral systems" and formed the basis for recommendations regarding the future use of prereferral intervention systems within the schools (p. 10). His research corroborated the research of Gutkin and also identified 41 different factors that were viewed as facilitators of successful implementation. This list of facilitators included the need for clear guidelines and mandatory procedures for prereferral systems with specific role expectations, scheduled time lines, easy forms, practical outcomes for referral sources, and efficient channels of communications. A differentiated approach for secondary schools was also suggested. In addition to the findings of Gutkin and Walsh, several other practical considerations

must be addressed in order to promote successful implementation of the prereferral concept. Curtis, Zins & Graden (1985) caution those interested in using this approach to consider at least the following:

- a. easy access to the prereferral process.

Meeting times and locations can be problematic because classroom teachers and working parents have little time during the school day.

- b. the membership of the team if a team approach is used.

There is no single team composition appropriate for all situations. Team members can be selected for a variety of reasons depending on the situation of the individual cases.

- c. incentives for participation in the prereferral process.

This could mean reduced supervision in other school routines or some other compensatory reward or acknowledgment.

- d. written records.

Records must be kept so that there is documentation of the problem and the intervention.

- e. the school's needs and readiness for change.

f. the inclusion of staff in program planning and implementation in order to gain commitment and involvement.

- g. in-service sessions that describe goals and objectives.

- h. special training in specific skills (e.g. consultation).

- i. legal and ethical considerations.

One ethical concern is that the system will "delay or deny" special programming to handicapped students who should be placed in special education programs. A second concern is that parents must be made aware of prereferral interventions involving their child. A third concern centers around issues of confidentiality that must be addressed. (pp. 16-19)

Zins & Curtis (1984) add the following considerations:

- a. gaining sanction and support at all levels of the hierarchy, including classroom teachers, building administrators and system administrators.
- b. presenting a rationale for the system.
- c. providing for accountability data (plan procedures to evaluate the system for its effectiveness).

Of greatest importance is the determination of improvement in the educational and behavioral performance of individual students.

(p.383)

In conclusion, prereferral implementation must be attentive to the context in which it is to be practiced. Schools are complex places and these new services involving collaboration must fit the context of the school. To date, it appears that progress is being made in this regard and collaborative partnerships are developing well within many schools although the results of this implementation will undoubtedly remain mixed during this period of change. However, data from the Gutkin study reveal at least tentative support for the potential effectiveness of a prereferral model as an alternative to traditional practices.

The CPPT as a Process of Prereferral Intervention

The Consultative and Program Placement Team (CPPT) incorporates much of what the above research has maintained should be considered when trying to implement such a prereferral system, including collaborative problem solving and an ecological perspective. It also uses similar

programmatic features developed by several of the researchers who have implemented and studied the effects of prereferral intervention programs. As an example, the work of James Chalfant is comparable when the involvement of special support personnel providing assistance to general educators is considered. However, the CPPT is not merely reiterative of others' prereferral intervention programs. The CPPT version of prereferral intervention is distinctive in at least five ways. First of all, the CPPT incorporates the team approach as well as the individual consultant version of the prereferral system. The CPPT makes distinctions between problems that the team can solve and those for which an individual consultant is needed. The CPPT is organized in such a fashion as to enable it to branch out in either direction depending on the specifics of the concern. When other consultants are needed, the "core" of the team (which includes the referring teacher) makes a decision to involve specialists in the "significant other" portion of the team (eg. reading specialists, medical doctors, parents, other classroom teachers, community agency representatives) in order to seek a resolution appropriate to the specific concern. The "significant other" component of the CPPT recognizes the value of assuming there is more than one particular combination of experts that can adequately address problems. The idea is to have a pool of possible resource people to call upon as needed. A second distinction which is closely tied to the first is the belief firmly embedded in the philosophy of the CPPT that each classroom teacher is an expert; that all teachers have the capability of solving problems. This belief leaves little room for a hierarchical approach which would give more value and credence to one professional over another. The CPPT promotes equality of all professionals involved in

the collaborative model and does not view any one member as having more credibility than another. As a third distinction from the other prereferral interventions systems, the CPPT is organized to give teachers the needed time to engage in the problem solving requirements of the process. Teachers involved in the CPPT are given released time from their regular teaching duties in order to be able to participate in the process. A fourth distinction is apparent when one considers the role that the CPPT plays in bridging the gap between the school and other community agencies (eg. Family and Community Development Program, Alberta Mental Health, Samaritans, etc.). Fundamental to the organization of the CPPT is the effort that goes into collaboration with other agencies. This collaboration is with the permission of the parent or guardian and is considered absolutely crucial to the process. Intervention plans must be shared with the other agencies that are supporting the student (and family) so that all agencies are working together and not in isolation or at cross-purposes. Parents have positively commented on the coordination of services in addressing a concern for student behavior or academic achievement. And lastly, a major distinction lies within the fact that the CPPT was designed to indirectly help students by directly helping teachers to help themselves. As noted earlier in the literature on prereferral intervention, one of the primary purposes for its development was to screen student candidates for special education. Although the CPPT provides a valuable service in this regard, it was certainly not the prime reason for its establishment. The CPPT set out to help teachers with the many and diverse difficulties that their students (all students not only those in special education) were experiencing. It was the goal of the CPPT to provide an inschool system of support for

these teachers in their daily working reality. The fact that the CPPT has been able to provide better programming alternatives for students and additional support to these students' parents and families, as well as bridge the gap between home, school and community agencies is testament to the potential of this model.

CHAPTER THREE
CONSULTATIVE AND PROGRAM PLACEMENT TEAM (CPPT):
INITIAL GUIDELINES FOR IMPLEMENTATION

DESCRIPTION AND PURPOSE

The Consultative and Program Placement Team (CPPT) is an inschool system of support for classroom teachers, students and parents. This consultative model is based on a team approach that exhibits collaborative leadership and teacher empowerment. This approach is based on the belief that collectively teachers have the knowledge and attitudes to solve almost any educational problem.

The referring classroom teacher, a special education teacher, a regular classroom teacher, a school administrator and a school district psychologist comprise the "core" of the team. The team may be expanded to include "significant others" such as parents, additional teachers, support staff, medical doctors, community agency representatives, subject area coordinators, etc.. The team meets at regularly scheduled times to discuss the "needs" (academic, physical, social, emotional, behavioral) of individual children. For each child dealt with, a plan of action is formulated and team member(s) are designated as being most responsible for each component of the plan. The plan implementation is monitored by the CPPT "core" team and follow-up consultations are scheduled as required.

The goals of the CPPT are:

-to provide an in-school system of support to teachers in their attempts to meet the needs of their students.

-to better meet the academic, social, emotional, behavioral and physical needs of all children; not only those students in special education.

-to improve communication and support networks among the home, the school, and other community agencies.

-to provide on-going professional development for classroom teachers and their administrators and to reduce the isolation of professionals that often exists in schools.

-to increase the skill and comfort level of teachers as they work with children who have special needs.

-to provide more immediate response to classroom needs.

-to use time more efficiently and effectively in supporting teachers, students and parents.

-to improve staff morale and cohesiveness by resolving individual staff concerns through collaborative problem solving.

-to provide an efficient prereferral screening service for special education programs in an effort to avoid inappropriate referrals.

OPERATION OF THE TEAM

a. Team Composition

As mentioned briefly in the description and the purpose section of this guide, the CPPT consists of two parts. The "core" group is the part of the team that is constant. The referring classroom teacher is considered to be the part of the team that is constant while the "significant other" group is called upon from time to time to add expertise depending on the particulars of any one situation. The

referring classroom teacher (different from the regular classroom teacher who is part of the "core" team too) is considered to be part of the "core" group while the team is deliberating on the case the referring teacher has brought forward. Referring teacher A becomes a member of the team when the team meets to discuss Teacher A's concern. Referring teacher B becomes involved as a member of the team when B's concern is on the agenda. The "significant other" group will be defined by the needs of the particular case. At times this will mean that specific individuals, such as parents or community agency representatives will become part of the team and at other times it will mean that the "core" team will problem solve without any "significant others". It is important to remember that there must be flexibility to build a team suitable to address the needs of particular referrals and that no one team is going to work for all situations. It is essential that a large pool of human resources that can be drawn upon to meet the needs of individual cases.

Every teacher has expertise that makes him or her valuable as a possible "core" team member. However, it is wise to look at the total composition of the "core" team in terms of skills and experiences so that individuals add a variety of strengths. Choosing the "core" team members as outlined in the description and purpose of the CPPT is what worked well in one particular school. That particular team was selected for the following reasons:

- i. Referring Teacher - this teacher likely knows the most about the referred student in the context of the school. This teacher also knows the specifics of the classroom in terms of the social network, the curriculum, the expectations of the teacher and the relationship

between student and teacher. The team will not find success without the willingness of this teacher to become part of the solution.

ii. System-based Psychologist - among other abilities the psychologist has specific skills in observation, behavior management and assessment. The psychologist also has access to many "ideas" because of his or her involvement with several teachers in the district. The psychologist also has experience with many of the other community agency representatives and therefore can anticipate how best to work with them. In addition, the psychologist is the main link between the team and the Student Services Department and therefore provides liaison with that part of the school district.

iii. Special Education Teacher - this teacher has experience in academic assessment work, program modification and individualized planning. This representative is also familiar with program alternatives and the procedures that must be adhered to for special education entry and exit.

iv. Classroom Teacher- this teacher represents the regular classroom teachers on the "core" team. Familiarity with a variety of regular classroom behaviors as well as experience in dealing with the regular curriculum provide expertise that the referring classroom teacher, in particular, often finds beneficial.

v. School Administrator - this teacher possesses "whole school knowledge" and can provide pertinent information from a broad perspective. This member can also adjust timetables and staffing to meet the needs of teachers and students. In addition, this member can provide information about school and district policy. Most importantly, by being an active team member the school administrator can show

visible support for the process and the action plans that result from the process.

In addition, there are other factors which should be considered when making a team selection. Firstly, it is important that the team members have the desire to become involved. It is critical that those who are to become "core" members of a team are enthused and willing to work within the framework of the concept. Like most things in life, it is difficult to be truly successful at something that you do not believe in. Secondly, the "core" members have to be accessible. Through creative timetabling at the school level it may be possible to release the "core" team to meet one morning a week. This reduces the possibility of overburdening these people by asking them to spend their out of school and preparation times on the project. Funding by Lethbridge School District #51 provided the financial resources needed to provide a substitute teacher to release referring classroom teachers for the meetings. With the provision of one substitute teacher for each of the meeting mornings, it became possible to free referring teachers to join the meeting. When referring teacher A joined the "core" team for the meeting a substitute teacher released Teacher A from his or her regular teaching duties. When teacher A was finished with the meeting, the substitute continued on to referring teacher B's classroom so that Teacher B could then join the team.

b. Meeting Arrangements

The team must meet on a regular basis; once a week as a preference. To lend consistency to the meetings consideration should be given to conducting them during the same block of time, on the same day of the

week and in the same location. Scheduling for a whole morning or a whole afternoon is the most cost efficient if there are concerns about substitute costs for releasing referring classroom teachers or "core" team members from their regular duties.

c. Referral Process

The referral process must be kept simple. The name of a student as well as an indication as to whether the referral is academic or behavioral or both must be submitted to the "core" team member responsible for setting the schedule. The referral submissions must also meet a deadline date in order to be considered for the up-coming meeting.

d. Preparation for the Meetings

Prior to each weekly meeting the following duties must be accomplished by one or more members of the "core" team. The administrator may choose to perform these tasks since this team member may have more flexible time and easier access to secretarial assistance. However, any "core" team member is capable of carrying out the duties, providing time is given to this person to complete the tasks. First, a meeting schedule must be generated. This schedule is made after the necessary "significant other" group has been contacted (where appropriate) and meeting times have been confirmed. The schedule is based on the new referrals that have been received as well as on the need to follow up on cases that have already been entered into the process. Most cases are scheduled for 30 minutes in length, but this will vary case by case depending on the number of agencies to be represented, parental discussion time and the severity of the case.

Different kinds of cases and situations will need different time allotments. Second, prior to each meeting confidential and cumulative record information must be gathered. This information is then kept in a specified location so that other members of the team can access it prior to the meeting and thus familiarize themselves with the information. (Caution: The issue of confidentiality must be addressed with the team, the administration of the school and representatives of central office administration in order to follow the policy of the school district). Third, a substitute teacher must be ordered and a schedule prepared for the substitute. Fourth, the parent or parents of each new referral must be informed about the referral so that these people are aware of the concern and the discussion which is to take place. This is the responsibility of the referring teacher. And last, team members ("core" and "significant others") are encouraged to make some kind of observation of the particular students referred for the meetings in cases when the team members are not familiar with the student. This observation is not for the purpose of gathering information about the particular concern but rather to familiarize each team member with the student. This could mean classroom, hallway or out of school (at recess or noon) observation.

e. Meeting Format

One member of the "core" team takes the role of team leader. The leader is responsible for keeping the team on task and for providing opportunities for all team members to participate. The leader introduces each case as it occurs on the schedule. He or she then asks the referring teacher to describe his or her concern. The referring teacher also describes the interventions that have been

tried. At this time the school district psychologist reviews information (should it be available) that is pertinent to the case. Cumulative record information and information from the "significant other group" is also shared. Through a process of questioning, clarifying and discussing the team becomes familiar with the concern and has a common understanding of the situation. Only then does the team begin to formulate a "plan of action". It is important to remember that the "plan of action" is for the team and not just for the referring teacher. Each part of the plan includes the name of the person most responsible for a specific part of the plan. As well, every "plan of action" includes provision for follow-up since this is an on-going process in most cases. At the follow-up meetings, the case is reviewed, new information is shared, an assessment of the "plan of action" occurs and then further plans are established. Essential to the process is the record-keeping. One of the members of the "core" team is assigned the role of recorder. Accurate and meaningful documentation is essential to the tracking of students. After each meeting, the recorder arranges for a copy of the meeting information and decisions to be disseminated to each participant.

Examples of "plans of action" may include:

- a. provision of instructional alternatives.
- b. provision of supplemental classroom materials.
- c. provision of human resources.
- d. provision of inservice to assist the teacher in areas such as program modification.
- e. scheduling parent/student/community agency/team conferences.

- f. development of a behavior management plan.
- g. referral to community agency.
- h. referral for further academic testing.
- i. referral for psychological assessment.
- j. other strategies of intervention.

CHAPTER FOUR

EVALUATION

The evaluation component of this project is in three sections. Section A is an evaluation of the CPPT concept and process, Section B is an evaluation of the initial guidelines as presented in Chapter Three and Section C is a summary of the recommended changes and revisions as proposed in sections A and B. Section C will also indicate which of the proposed changes and revisions will be included in Chapter Five's final guidelines.

SECTION A - Evaluation of the CPPT Concept and Process

The evaluation of the CPPT concept and process was completed by the original Consultative and Program Placement Team of Nicholas Sheran Community School. Each member of the "core" team, (the special education teacher, the administrator, the school-district psychologist, the regular classroom teacher, and a representative of the referring classroom teachers) was asked to participate in the evaluation by answering specific interview questions (Appendix B). Following are summaries of the individual interview responses of the "core" team.

Special Education Teacher's Evaluation

Positive Features of the CPPT

1. A broader focus than only special education programming can better meet the needs of many children. In the CPPT the "total" needs of the

child are addressed and the emphasis is on supporting the child in the regular classroom setting whenever possible.

2. Conferencing fosters improved communication and reduces both the time and paper work involved in sharing information.

3. Group discussion provides a broader and more objective perspective to decision-making regarding the type of program or combination of programs that best meet the child's needs (Learning Assistance Program, Learning Disabilities Program, Severely Learning Disabled Program, Modified Program, Regular Classroom Program, etc.).

4. Group discussion and decision-making regarding the child's program results in a "shared" responsibility for programming.

5. Group decision-making regarding which children require psychological assessments helps to reduce the number of assessments and provides faster assessment completion for those that are done. At the same time, teachers become more aware of other possible intervention strategies that do not require psychological assessment as the first step.

6. Group decision-making regarding the type of psychological assessment needed is beneficial. There are times when affective as well as cognitive information is necessary to better understand the child.

7. Screening through CPPT throughout the year eliminates the need for

concentrated testing in the fall and enables special education programming to start sooner in the school year.

8. Concerns are perceived to be "school" rather than "individual teacher" concerns. This enhances staff cohesiveness.

9. Opportunities to develop stronger personal and/or professional relationships with colleagues, community agency representatives, parents and students is continuous.

10. Greater awareness of the role of the Student Services Department develops as well as how the school and Student Services can support each other.

Negative Features of the CPPT

1. There are no negative features of the CPPT if the process is carried out as intended. However, a possibility for break down of the team approach lies in situations where one member of the team makes decisions on the behalf of the team or if team decisions are monitored by individuals rather than by a full team effort. The strength of the process lies in team decisions and team follow-up.

Suggestions for Changing the CPPT

1. Expanding the team to include more staff members who wish to be involved as "core" team members should be considered. Since many staff members wish to be involved, perhaps "core" membership could be rotated.

2. Make better use of the Family and Community Development Program when students referred to the CPPT are working with that agency.
3. Inclusion of the soon to be hired elementary counsellors as "core" team members.

Additional Comments

1. All "core" members must have equal status while recognizing that each member has different strengths.
2. All assessment requests must go through the team so that there is a centralization of process.
3. Meetings must be regularly scheduled.

System-Based Psychologist's Evaluation

Positive Features of the CPPT

1. Involvement in the team approach provides deeper awareness of the many abilities of the "core" team members.
2. Group discussion short-circuits potential assessments because the consultative process provides some strategies for implementation at the classroom or school level.
3. Participation is beneficial in that the prereferral discussions

enable psychologists to obtain useful background information prior to an assessment. Discussions bring about a broader perspective with a balance between the positive and negative comments about specific children who are referred. When parents are present at the meetings there is an opportunity to gain other valuable information.

4. Psychological assessments have been coordinated by the "core" team. As a member of the "core" the psychologist is more aware of the priority of the assessment referrals. As well, psychologists get a better picture of what teachers and parents really want and need from an assessment.

5. Comparative assessment and consultative figures with the previous school years reveal and justify on-going involvement in the CPPT process. Classroom observations and consultation greatly increased while assessment decreased by more than 50%. This change in role for psychologists provides more balance to their work assignment.

6. Teachers receive immediate feedback and the time between referral for psychological assessment and reporting the results is shorter.

7. Parent conferencing is done with the team rather than the psychologist or psychologist and classroom teacher only. The parent receives input from the team and this effort shows parents the large commitment that these team members have to the child.

Negative Features of the CPPT

1. Parents can be outnumbered in the conference and thus they may

feel threatened by the situation. It may be necessary to manipulate the size of the group. However, when the team is deliberately cut to reduce parental anxiety there is a loss of continuity and consistency from the perspective of the team.

Suggestions for Changing the CPPT

1. None

Additional Comments

1. Participation in the CPPT has been a very positive experience.

Regular Classroom Teacher's Evaluation

Positive Features of the CPPT

1. Student programs have been improved in several ways because there are so many ideas generated at the meetings. The time required to meet the needs of students has also been greatly reduced. Results are often immediate.
2. Everyone involved with a particular student is aware of the plan that is being utilized to meet the needs of that child. There is very little chance for communication breakdown and consistency is high.
3. Collaboration with community resources can also provide help for individual children and their families. The school, the home and the community work in partnership rather than in isolation.

4. Collegiality is modelled by the "core" team with everyone working together to help each other out. Teachers receive assistance without fear of "showing their weaknesses".

5. Personal and professional development occurs for each individual involved in the process. We have learned from each other and about each other. There is a greater awareness about each staff member's strengths as well as the services that Central Office personnel can offer the schools. This means that the resources of the school district are being utilized in an effective manner.

6. The "core" team provides consistency to problem solving since they are aware of the resources available to the classroom teacher and student.

Negative Features of the CPPT

1. Occasionally the "core" team took on responsibilities for the referring teacher that the teacher should have kept.

Suggestions for Changing the CPPT

1. The composition of the "core" of the team must be designated in such a fashion as to allow a balance of new and seasoned members. Perhaps "core" team membership should be a two year term with half of the representatives changing each year.

2. More inservice for the "core" team members on such things as interpreting psychological assessment tools and scores, special education program alternatives, community agency assistance, etc..

Additional Comments

1. Parental notification after the initial conference or even prior to the initial conference is important. Parental involvement should be stressed.
2. Meetings must be on a weekly basis so that the classroom teacher can rely on immediate service.
3. Follow-up of team decisions must be a team responsibility.

Referring Classroom Teacher's Evaluation

Positive Features of the CPPT

1. Colleagues are on hand to give you immediate support. The team members are good listeners and trust is built very quickly.
2. Team discussion brings out different points of view. Getting the whole story by listening to everyone who has information about the child leads to a better understanding of the situation.
3. Practical, workable ideas are generated, not just paper work or theoretical ideas.
4. Other alternatives are explored aside from the possibility of psychological assessment. When psychological assessment was needed, Student Services' support was quick.

5. Responsibility for the implementation of the plan of action is shared and this reduces the stress and workload of the classroom teacher.
6. Teachers become more knowledgeable about interpreting assessment tools, special program requirements and available resources.
7. Coordinating interagency representation when students and their families are involved with other agencies is beneficial in lending consistency to a child's program. Having the meetings at school when other agencies are involved makes parents more comfortable since the school is viewed as a safe place to go.

Negative Features of the CPPT

1. Weekly time restrictions can be limiting. When there is a large number of cases, there is not always enough time to handle all of the cases that have been referred that week.

Suggestions for Changing the CPPT

1. Provide additional financial support through in-school budgetting so that there is ample money to release all of the people needed to resolve concerns.
2. Involve more students in the team process.
3. Include elementary counsellors as part of the "core" team.
4. Involve all of the teachers who want to be part of the team.

"Core" membership should be based on a volunteer system. When there are too many volunteers for the "core" team then use them in the "significant other" section of the team whenever possible.

Additional Comments

1. Teachers should go to the CPPT meetings well prepared so that time is used efficiently and effectively.
2. The strength of the team depends on the individuals of the team. These people must be willing to listen, compromise and assist.

Administrator's Evaluation

Positive Features of the CPPT

1. The CPPT concept provides an effective and efficient system of professional development through increased cooperation in planning and the sharing of resources. Group discussion and brainstorming have increased teachers' skills in analyzing and solving classroom problems. Teachers have also become more aware of differing teaching styles, effective discipline techniques, expansion of evaluative methods, and strategies for planning effective individualized programs as well as many other professional development concepts.
2. The CPPT improves communication in a number of ways. Firstly, it gives teachers opportunities to work collegially by deliberately creating a scheduled sharing environment. Secondly, communication with parents and outside agencies (eg. Alberta Mental Health) has improved.

By inviting parents and other agencies to attend CPPT sessions, there has been increased cooperation in the search to find solutions to problems. Parents have praised the concerted efforts of the team to resolve problems. Thirdly, outside agencies have mentioned the payoff to their clients in terms of consistency of expectations among home, school and agency. Fourthly, by having the school district psychologist as part of the "core" team there has been enhanced communication with the Student Services Department. Through the liaison work of the psychologist the required information is readily available to Student Services. Fifthly, with reduced assessment demands there is more time available for the school psychologist to communicate with school staff members in a consultative fashion. And finally, documentation is kept for each case which will assist future communications needs.

3. The CPPT uses administrative time more efficiently. By coordinating the communication necessary in making decisions about students, a great deal of effort and time has been saved. Everyone involved in a particular case has the opportunity to hear, at the same time, what everyone else has to say about the case. There is no need for repeating. In-school meeting time has been a major contributor enabling the saving of time. No longer are we scrambling for morning, noon, recess, and after school meetings. By meeting weekly, at the same time, in the same room, there is an element of consistency that lends itself to efficiency of time. Teachers come to the meetings well prepared to express their concerns and everyone focuses their attention to solve the problem. Time is used wisely in a cooperative, collegial atmosphere.

4. The CPPT enhances positive staff morale by providing a vehicle for shifting staff concerns to constructive problem solving. The individual teacher's problem becomes a problem for the team. The teacher does not merely give the problem away but stays to become part of the solution. Everyone contributes to the resolution and a natural bonding occurs among the group. The CPPT becomes a credible unit to the referring classroom teacher rather than an add-on or a threatening group of so-called experts.

5. The CPPT provides more programming alternatives for children. By channelling all of the students who have special needs through one placement team there is an opportunity to meet the needs of all children. There is less chance that efforts will be duplicated or solutions neglected. Students can be tracked throughout the years in an effort to fulfill the team's obligation to them.

Negative Features of the CPPT

1. Providing coverage for the "significant other" team members can be difficult.
2. There are far more staff members who wish to be part of the team than there are positions on the team.

Suggestions for Changing the CPPT

1. At the Junior High level, provision must be made to include the advisor of the student. The advisor is the teacher on staff most responsible for the student during his or her stay at the school.

2. At the elementary level, the newly appointed counsellors should become part of the "core" team.
3. More students should be involved in the meetings.

Additional Comments

1. There is no one process that will be applicable to every school. Each school is unique and therefore it is imperative that the process be structured to meet the uniqueness of each school and the people it serves.

SECTION B - Evaluation of the Guidelines in Chapter Three

The evaluation of the guidelines was completed by five professional educators: one junior high classroom teacher, one elementary classroom teacher, one junior high counsellor, one junior high principal and one junior high special education teacher. None of these people had previous experience with the CPPT. These professionals were provided with a copy of the guidelines as presented in Chapter Three and were asked to respond to a questionnaire (Appendix C). Their responses were sought in order to determine whether the guidelines were sufficient to allow other schools to try implementing the CPPT process based on those guidelines and whether the CPPT process held promise at the junior high level. Following are their responses to each of the four questions included in the questionnaire.

Summary of Question 1 - Do you think that the guidelines are clear and give adequate information and direction to school professionals who

wish to implement such a process?

Junior High Classroom Teacher - "Yes. Sounds good to me."

Elementary Classroom Teacher - "Yes, if earlier or later chapters of your document discuss how CPPT is useful to students, parents, staff, etc.. Also include in your paper how and why the CPPT was first initiated. Consider using a few examples of the CPPT in practice to show how different cases were presented, discussed and acted upon. (Ensure confidentiality by changing names). Questions: Is having school system psychologists on the team an efficient use of their time? Can this process be implemented without the administrator as a team member? How did you release the "core" members from their duties to be able to participate?"

Junior High Counsellor - "Yes. Perhaps addressing the following questions would also be helpful. How does the school's discipline policy fit with this model? How do "core" members cover their classes?"

Junior High Principal - "No, not at the Junior High level. It would seem to me that in most cases all of the teachers of a particular student should be members of the "core" team for that student (as opposed to just the referring teacher). If this were incorporated into the model the CPPT would be very large. In addition, I think that the school counsellors should be involved. They usually have valuable and pertinent information regarding kids who are perceived as having special needs. I also believe that there should be different models in

place for dealing with referrals of students who are behavior problems and students who have difficulty with the curriculum and/or instructional approach in the regular classroom. In the instance of referrals for behavior, all teachers must be involved and committed to the plan of action in order to ensure the highest possible degree of consistency in applying the plan. I would argue that, in many instances, the student should be on the team, perhaps as a 'significant other'."

Junior High Special Education Teacher - "Yes. The guidelines are clear and do give adequate information and direction to school professionals who wish to implement such a process. The one exception is noted in my answer to question three. This process is similar to the one I'm already involved with through articulation meetings and annual reviews for special education students."

Summary of Question 2 - Do you think these guidelines would be useful to you if you were to implement such a model?

Junior High Classroom Teacher - "Yes. These guidelines give a skeleton model for the process."

Elementary Classroom Teacher - "Yes. You emphasized the need to have a dedicated team that has a balance of skills and expertise. You've also discussed other critical factors needed for success, such as joint ownership of problems or issues. You might include suggestions on how to get started if there isn't general staff or

administrative support. I think the philosophy is very good but some staff members may think that the CPPT is a power trip and that the same results can be reached without it. Question: Can it work without total staff support?"

Junior High Counsellor - "Yes. The listing of goals and detailed descriptions was excellent. The plan of action examples were a good idea."

Junior High Principal - "Comments as per Question 1."

Junior High Special Education Teacher - "These guidelines would be very useful in implementing such a model. Minor modifications can easily be made to suit the needs, structure and organization of different schools. These guidelines provide a strong base from which to proceed."

Summary of Question 3 - What recommendations do you have for changing the format or the content of the guidelines?

Junior High Classroom Teacher - "Content is good. It sounds like a helpful process for a school. I think you need a wrap-up paragraph if this is the end of a chapter."

Elementary Classroom Teacher - "I understand that parents were always a part of the team when their own child was referred. Parental involvement is not clear in the document. You need a section

called "Getting Started - What to Do to Initiate a CPPT". Questions: Is the referral done on a standard form? If so, is a sample one included in the appendices? Is there a system of prioritization of referrals? What about critical cases that didn't meet deadlines for referrals? Are any cases discussed apart from the team? Is the team leader the same for the entire year or is he/she on a rotating schedule?"

Junior High Counsellor - "I'd recommend at Junior and Senior High School level that the school psychologist be included as a 'significant other' team member rather than as a 'core' member. I also recommend including the school counsellor at Junior and Senior High School level as one of the 'core' team."

Junior High Principal - "Comments as per Question 1."

Junior High Special Education Teacher - "Perhaps in a Junior or Senior High school setting where all students spend equal time with several classroom teachers, a preliminary meeting with all of these teachers might be necessary to discuss the student in a school context. No one teacher could know the specifics in terms of social network, the total curriculum, the expectations of each teacher in each subject and also the relationship between the student and each of his/her teachers. The confidential and cumulative files will not always provide the necessary information. The guidelines are not clear as to what point in this process this type of group discussion would occur."

Summary of Question 4 - Other comments about the guidelines or the process.

Junior High Classroom Teacher - No comments were offered.

Elementary Classroom Teacher - "Did you require and do you recommend approval by the Superintendent and/or Student Services Associate Superintendent before implementing the model? Do you change the "core" membership (excluding administrator and psychologist) each year to give more staff members the professional growth experience? Have you addressed the limitations of the CPPT and the special application of it in secondary schools? Are students ever part of the team, especially in upper elementary or secondary situations in cases involving them? Is there a built in evaluation of the process for staffs to use to gauge success?"

Junior High Counsellor - "The last sentence of part d - 'Preparation of Meetings' is confusing. Isn't it premature to contact 'significant others' before 'core' team has had their initial meeting? Generally an excellent set of guidelines that are well organized and easily understood."

Junior High Principal - "The guidelines are clear."

Junior High Special Education Teacher - "Will the CPPT meetings replace the articulation meetings held for all or some of the Learning Assistance Program students? Should they? Could they? This CPPT process, like the articulation process used in special education is

always more effective because a team approach is used. Parents must be made to realize that they are very important members of the team and often their involvement or lack of involvement may mean the difference between success or failure for the student. This team approach also forces ownership of all special students on the entire staff rather than on one or two teachers."

SECTION C - SUMMARY OF SUGGESTED CHANGES AND REVISIONS

Sections A and B provided several suggestions for change or revision to the initial guidelines as presented in Chapter Three. Those recommendations are summarized and categorized into two groups as follows:

Suggestions to be Implemented in the Final Guidelines

a. Clarify team membership by addressing the following: the necessity for having the school district psychologist and the school-based administrator on the "core" team, the inclusion of the school-based counsellors as "core" members, the rotation of the membership on the "core" team and the involvement of interested professionals as "significant others" whenever possible.

b. Provide further information on how the "core" team members are released from their classroom assignments.

c. Address the issue of who will be selected as team leader and for how long.

d. Limit the use of the present CPPT format to elementary

schools.

e. Provide inservice for "core" team members on issues of relevance to their function as team members.

f. Inform parents about the referral of their child to the CPPT. Clarify the role of the parent in the process.

g. Provide the necessary financial support to release the staff members who need to be part of the team meetings.

h. Delay contacting "significant others" until the initial "core" team meeting for the specific case has taken place.

i. Provide a sample referral form.

j. Provide direction on what should be done to initiate a CPPT and whether it is possible to get one started without general staff or administrative support. Clarify whether system level approval is necessary prior to the implementation of the CPPT.

k. Clarify whether referrals are prioritized, whether all cases must be dealt with through the team and what can be done if the deadline date for referral submission is not met.

l. Provide information about evaluating CPPTs.

m. Provide a wrap-up paragraph to the guidelines.

n. Provide flexibility in determining the team composition and size in situations where parents can be intimidated by large numbers of professionals.

o. Involve more students in the process.

p. Clarify whether the CPPT will replace the "articulation" meetings used by special education teachers.

Suggestions that will not be Implemented in the Final Guidelines

a. Describe some actual cases but change the names of the referred for the sake of confidentiality.

This suggestion will not be used because it is not the intention of this writer to be that specific, rather to provide a guideline for implementation. As well, Section 5 of the guidelines speaks to a "plan of action" that should provide general guidance to those who wish to better understand the myriad intervention strategies.

b. Clarify how the school's discipline policy fits with the CPPT process.

This suggestion is worth further attention and should be considered by the individual school seeking to implement a CPPT process. However, since discipline policies vary with each school, no attempt will be made to deal with this request in the guidelines.

c. Develop different models for distinguishing between behavior and academic referrals.

This suggestion will not be addressed since it is the experience of this writer that the present process works equally well for either type of referral. Once the initial meeting has taken place for the specific referral, the "core" team will determine the "significant others" to be involved taking into consideration whether the referral is academic, behavior or both.

d. Use the school district psychologist as a "significant other" rather than as a "core" team member.

This suggestion will not be used because of this writer's strong belief that the psychologist is an extremely important "core" team member. See page 52 (Chapter Five) for further rationale as to the inclusion of the psychologist as a "core" team member.

e. Make better use of the Family and Community Development Program.

Although this writer feels that this organization can provide many of the resources which will assist in intervention planning, this particular agency will not be singled out as requiring more use.

CHAPTER FIVE
CONSULTATIVE AND PROGRAM PLACEMENT TEAM (CPPT):
REVISED GUIDELINES FOR IMPLEMENTATION
IN ELEMENTARY SCHOOLS

The Consultative and Program Placement Team (CPPT) is an inschool system of support for elementary classroom teachers, students and parents. This consultative model is based on a team approach that exhibits collaborative leadership and teacher empowerment. This approach is based on the belief that collectively teachers have the knowledge and attitudes to solve almost any educational problem.

1. GOALS OF THE CPPT

The goals of the CPPT are:

- to provide an in-school system of support to teachers in their attempts to meet the needs of their students.

- to better meet the academic, social, emotional, behavioral and physical needs of all children, not only those students in special education.

- to improve communication and support among the home, the school, and other community agencies.

- to provide on-going professional development for classroom teachers and their administrators and to reduce the isolation of professionals that often exists in schools.

- to increase the skill and comfort level of teachers as they work with children who have special needs.

- to provide early response to classroom needs.

-to use time more efficiently and effectively in supporting teachers, students and parents.

-to improve staff morale and cohesiveness by resolving individual staff concerns through collaborative problem solving.

-to provide an efficient prereferral screening service for special education programs in an effort to avoid inappropriate referrals.

2. TEAM ORGANIZATION

2.1 "Core" Team

The "core" team, proposed herein, is the part of the team that remains constant and consists of the referring classroom teacher, a special education teacher, a regular classroom teacher, a school administrator, a school district psychologist and a school counsellor. Other "core" members may be considered as is appropriate to the particular school.

There are many reasons for selecting the "core" team as presented above. Looking at each representative's strengths will clarify why they were selected.

2.1.1. Referring Teacher

The referring classroom teacher becomes part of the "core" team while the team is deliberating on the case the referring teacher has brought forward. Specifically, referring teacher A becomes a member of the "core" team when the team meets to discuss Teacher A's concern. Referring teacher B becomes a member of the "core" team when B's concern is on the agenda.

This teacher is essential to the CPPT process because he or she likely

knows the most about the referred student in the context of the school. This teacher also knows the specifics of the classroom in terms of the social network, the curriculum, the expectations of the teacher and the relationship between student and teacher. The team will not find success without the willingness of this teacher to become part of the solution.

2.1.2. System Based Psychologist

Among other abilities, the psychologist has specific skills in observation, behavior management and assessment. The psychologist also has access to many "ideas" because of his or her involvement with several teachers and schools in the district. As well, the psychologist has experience with many community agency representatives and therefore can anticipate how best to work with them. In addition, the psychologist is the main link between the team and the Student Services Department and therefore provides liaison with that part of the school district.

The system based psychologist is an essential member of the "core" team. In order to use time efficiently and effectively, the presence of the psychologist at the meetings is vital. The presence of the psychologist eliminates the need for additional meetings to communicate information from teachers, parents, community agencies and administrators to the psychologist when assessment and consultation work is to be done. In addition, the CPPT changes the role of psychologist from tester to consultant. It is more efficient for the psychologist to hear relevant firsthand information and to participate in the decision-making process rather than responding later to requests for assessment.

2.1.3. Special Education Teacher

This teacher has experience in academic assessment, program modification and individualized planning. This representative is also familiar with program alternatives and the procedures that must be adhered to for special education entry and exit.

2.1.4. Classroom Teacher

This teacher represents the regular classroom teachers on the "core" team. Familiarity with a variety of classroom behaviors as well as experience in dealing with the regular curriculum provide expertise that the referring classroom teacher, in particular, often finds beneficial.

2.1.5. School Administrator

This teacher possesses "whole school knowledge" and can provide pertinent information from a broad perspective. This "core" member can make school-based decisions which will influence such structures as timetables and staffing to meet the needs of teachers and students. In addition, this member can provide information about school and district policy.

Some Prereferral Systems do exist without administrator participation as modelled in the Teacher Assistance Teams of Chalfant, Pysch & Moultrie, 1979. However, according to research (Walsh, 1989; Curtis, Zins & Graden, 1985) a primary blockage to the success of any prereferral system is the lack of administrator support. Lack of administrator support is defined as not only lack of financial and human resources support but also the lack of personal involvement in the process.

2.1.6. School Based Counsellor

This teacher often has pertinent information about regular students who are perceived as having special needs. This teacher also has a great deal of expertise in assisting these students with the difficulties that they are encountering. Much of the inschool counselling follow-up will be done by this person.

There are other factors which must be considered when making a team selection. Firstly, it is important that the team members have the desire to become involved. It is critical that those who are to become "core" team members are willing to work within the framework of the concept. Secondly, the "core" members must be accessible. Through timetabling it may be possible to release the "core" team to meet one morning a week. For example, the school may decide to operate a special education program for only four and one half days a week thereby permitting the special education teacher to be a "core" team member. The rationale for such a decision is based on the premise that the special education teacher is providing service to several students through the CPPT process. This, of course, is a fundamental change in the role of this teacher as a special education teacher. However, the concept of "released" time is essential to the success of the process so that CPPT members do not have to scramble to find time before school, at recesses and noons or after school.

Whether to appoint or elect "core" team members is a decision which must be made by the staff of each school as every teacher has expertise that makes him or her valuable as a possible "core" team member. However, when selecting the "core" team it is vital to look

at the total composition of the team in terms of skills and experiences so that individuals add a variety of strengths.

In situations where there are more staff members who wish to be "core" members than there are "core" positions, consideration should be given to a system of rotation which will permit a portion of the "core" team to be new each year. A combination of veteran and rookie "core" members will ensure continuity of process and information and will also give opportunities to new people to become involved in the process.

2.2 "Significant Others"

"The "significant others" are those persons who are called upon from time to time to provide their particular expertise. Whenever possible, parents are included as part of this group. At the very least, parents must be informed of the child's referral to the CPPT. From time to time, it is essential that other community agencies working with the child or the family of the child become involved in the process. The collaboration among home, school and community agencies is of great importance. In these cases, the parent of the referred child must give approval for the inclusion of these agencies at the meetings.

It is important to remember that the "significant others" of the team has the potential of involving many professionals from within and without the school district in an effort to aid the child and his or her family. This flexibility to build a team specific to the needs of particular referrals is critical since no one team may work for all situations.

3. REFERRALS

The referral process must be simple and direct. A CPPT referral form (Appendix D) is completed by the referring teacher and submitted to the core team member who is responsible for establishing the meeting schedule (Appendix E).

Referrals must meet a deadline in order to be considered for the upcoming meeting. Cases of an emergent nature should be channelled to the school administration and a decision made as to whether the case should be referred to the CPPT immediately.

4. MEETINGS

4.1 Scheduling

In general, the team should meet on a regular basis; preferably once a week. To lend consistency to the meetings consideration should be given to conducting them during the same block of time, on the same day of the week and in the same location. Scheduling for a whole morning or a whole afternoon is the most cost efficient.

Scheduling the meetings must be completed by one of the members of the "core" team. The administrator on the "core" team may choose to perform the scheduling task since this team member may have more flexible time and easier access to secretarial assistance. However, any "core" team member is capable of carrying out the duty, providing time is given to this person to complete the task.

The meeting schedule is developed and distributed after the requested "significant others" have been contacted (where appropriate) and meeting times have been confirmed. The schedule is based on new referrals that have been received as well as on the need to follow up

on cases that have already been entered into the process. Most cases are scheduled for 30 minutes in length, but this will vary case by case depending on the number of agencies represented, parental discussion time and the nature of the case.

4.2 Collecting Relevant Information

Prior to each meeting confidential and cumulative record information must be gathered. This information is then kept in a specified location so that other members of the team can access it prior to the meeting and familiarize themselves with the information. (Caution: The issue of confidentiality must be addressed with the team, the administration of the school and representatives of central office administration in order to follow the policy of the school district).

4.3 Substitute Teachers

A substitute teacher must be ordered and a schedule prepared for the substitute. This is the responsibility of the "core" team member who schedules the meetings.

Providing the financial resources needed to obtain a substitute teacher to release referring classroom teachers or "core" teachers for the meetings is important. With the provision of one substitute teacher for each of the meeting mornings or afternoons, it becomes possible to free referring teachers to join the meeting. When referring teacher A joins the "core" team for the meeting a substitute teacher releases Teacher A from his or her regular teaching duties. When teacher A is finished with the meeting, the substitute continues on to referring teacher B's classroom so that Teacher B can then join the team. An additional substitute teacher may have to be hired to

cover the teaching assignment of the regular classroom teacher if timetabling arrangements can not be made which will accommodate the release of this "core" member for the meetings. "Core" members such as counsellors, psychologists and administrators should be able to arrange their schedules to meet the weekly requirements of the team.

Requests for system level funding should be pursued to cover the cost of the "released" time and in situations where system funding is unavailable, or limited, provision for additional funds should be made through regular school-based budgeting.

4.4 Informing Parents

The parent or parents of each new referral must be informed about the referral so that these people are aware of the concern and the discussion which is to take place. This is the responsibility of the referring teacher.

4.5 Observation of Referred Students

Team members ("core" and "significant others") are encouraged to make some kind of observation of the particular students referred for the meetings in cases when the team members are not familiar with the student. This observation is not for the purpose of gathering information about the particular concern but rather to familiarize each team member with the student. This could mean classroom, hallway or out of school (at recess or noon) observation.

4.6 Format

From the group of "core" members one person is designated leader for

a period of time to be agreed upon by the "core" team. It is important that this leader has experience as a "core" member and thoroughly understands the CPPT process and what is expected of the leader. In general, the team leader is responsible for keeping the team on task and for providing opportunities for all team members to participate. Specifically, the leader introduces each case and asks the referring teacher to describe his or her concern as well as the interventions that have been tried. Other team members are then invited to contribute to the process. For example, the psychologist reviews information (should it be available) that is pertinent to the case. Cumulative record information and information from the "significant others" is also shared. Through a process of questioning, clarifying and discussing the team becomes familiar with the concern and has a common understanding of the situation.

Note: Consideration should be given to not involving members of the "significant others", including parents, in the initial meeting with the referring teacher in order to clarify the teacher's concern and to professionally prepare for the inclusion of the "significant others" at a later time.

5. PLAN OF ACTION

This "plan of action" is for the team and not just for the referring teacher. Each part of the plan includes the name of the person most responsible for a specific part of the plan. As well, every "plan of action" includes provision for follow-up since this is an on-going process in most cases. At the follow-up meetings, the case is reviewed, new information is shared, an assessment of the "plan of

action" occurs and then further plans are established. Items in a "plan of action" may include:

- provision of instructional alternatives.
- provision of supplemental classroom materials.
- provision of human resources.
- provision of inservice to assist the teacher in areas such as program modification.
- scheduling parent/student/community agency/team conferences.
- development of a behavior management plan.
- referral to community agency.
- referral for further academic testing.
- referral for psychological assessment.
- other strategies of intervention.

6. RECORD KEEPING

Record-keeping is essential to the CPPT process. One of the members of the "core" team is assigned the role of recorder, since accurate and meaningful documentation is vital to the tracking of students. The record is the "plan of action" as previously discussed (Appendix F). After each meeting, the recorder arranges for a copy of the "plan of action" to be distributed to each team member.

7. INSERVICE

Inservice should be provided for the "core" team. Since the "core" team must be familiar with such matters as the analysis of assessment scores, program alternatives, school and district policies as they pertain to the function of the CPPT, and the availability of community

agencies, initial as well as on-going inservice should be available to them. For example, the various community agencies should be invited to come to the school to discuss the role and function of the CPPT as well as to present information about the services that the agencies can provide.

8. EVALUATION

The process should be evaluated regularly so that modifications can be made which will enhance the CPPT's effectiveness. Input should be solicited from all the stakeholders, including classroom teachers, parents, students (where appropriate), district level personnel, administration, community agencies and the CPPT "core" members.

9. OTHER CONSIDERATIONS

Staff members in schools interested in implementing the CPPT, should as a first step, observe a CPPT meeting at a school already using the process. Gaining firsthand information to take back to colleagues is a good starting point. It is preferable that all, or most of a staff, support the CPPT concept prior to implementing it in any school although it is possible to start with a small group of colleagues who wish to try using the process. However, financial and human resources must be available and that will require the support of the school administration. In addition, the administration of the school should seek approval for the implementation of the CPPT from the school district.

It is imperative to realize that there is no single process that will be applicable to every school. Each school is unique and therefore the

process must be structured to meet the uniqueness of each school and the people it serves.

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APPENDIX A

ETHICS AGREEMENT

Dear

For a portion of my Master of Education creative project at the University of Lethbridge I have developed guidelines for the implementation of a collaborative decision-making model known as the Consultative and Program Placement Team (CPPT). I am anxious to receive feedback about these guidelines and I wish to seek your frank opinion as to how I can improve them. I am requiring you to participate in reviewing these guidelines from your own professional perspective as either counsellor, regular classroom teacher, special education teacher or administrator and make any suggestions you can to help me polish this document so that it may be a useful, practical guide in the schools.

I want to assure you that none of the feedback that you give me will be attributed to you personally unless permission has been sought and obtained. Your responses will remain confidential. I will, of course, feel free to use your opinions in modifying the guidelines.

I should add that you are free to withdraw from the project at any time. Any questions regarding this project can be directed, besides to myself, to the Chairperson of the Human Subjects Research Ethics Committee at the Faculty of Education.

Sincerely,

I agree to participate in this review under the above conditions.

Signature

Date

APPENDIX B

Interview Questions

1. What are the positive features of the CPPT from your professional perspective (general education teacher, special education teacher, administrator, psychologist, librarian/community related curriculum coordinator)?
2. What are the negative features of the CPPT from your professional perspective?
3. What changes would like to see implemented in the process?
4. What other comments would you like to make about the CPPT?

APPENDIX C

Questionnaire

1. Do you think that the guidelines are clear and give adequate information and direction to school professionals who wish to implement such a process? Please expand upon your yes or no answer.

2. Do you think these guidelines would be useful to you if you were to implement such a model? Please expand upon your yes or no answer.

3. What recommendations do you have for changing the format or the content of the guidelines?

4. Other comments about the guidelines or the process

APPENDIX D

CPPT REFERRAL FORM

(to be completed by the referring teacher)

Date

Student's Name _____

Reason for Referral _____

(Academic, Behavior, Both)

Names of "significant others" that you wish to be included in the initial meeting if it can be arranged _____

Meeting Date Request _____

- a. This week
- b. Within the next week or two
- c. Other

Referring Teacher's Signature

Attention Referring Teachers:

Please submit the above portion of this referral form to the team leader and remember to inform the parent of the student that you have made the referral to the CPPT. Ask the parents if they would like to be involved in the process. If they would, assure them that they will be contacted by one of the team members at a later date to arrange a meeting time.

APPENDIX E

MEETING SCHEDULE FOR THE CPPT

Meeting Date _____

| Time | Referring Teacher(s) | Student | Concern |
|-------|----------------------|---------|---------|
| 8:00 | _____ | _____ | _____ |
| 8:30 | _____ | _____ | _____ |
| 9:00 | _____ | _____ | _____ |
| 9:30 | _____ | _____ | _____ |
| 10:00 | _____ | _____ | _____ |
| 10:30 | _____ | _____ | _____ |
| 11:00 | _____ | _____ | _____ |
| 11:30 | _____ | _____ | _____ |

Meetings are scheduled in the Resource Room.
 *"Significant others" request has been arranged.

APPENDIX F

CPPT PLAN OF ACTION

STUDENT'S NAME _____ GRADE _____ MEETING DATE _____

REFERRING TEACHER(S) _____ TYPE OF REFERRAL _____

TEAM MEMBERS PRESENT _____

DESCRIPTION:

| PLAN OF ACTION | PERSON MOST RESPONSIBLE | RECORD OF ACTION |
|----------------|-------------------------|------------------|
|----------------|-------------------------|------------------|

REVIEW DATE _____