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ABSTRACT

This handbook, prepared by the Barrier Resolution Project in the state of Washington, includes specific instructions, materials, and checklists of equipment necessary for an outside facilitator to assist in the development of cooperative problem solving and planning related to special education. After introductory material including "keys to success" and a working definition of a district team, the first section enumerates group and individual responsibilities for the steering committee, for the district, for facilitators, and for the state Office of the Superintendent of Public Instruction. The second section, "Before You Begin," provides instructions and suggestions with respect to selecting facilities for two-day meetings and preparations for training, along with a checklist of supplies and equipment. The rest of the document provides a presentation plan for facilitating a team meeting, including step-by-step instructions and hints for the facilitator, questions for discussion, and worksheets. A Barrier Resolution Process evaluation sheet is included. (TE)

RESOLUTION OF BARRIERS

TO THE

EDUCATION OF HANDICAPPED STUDENTS

FACILITATORS' HANDBOOK

AUGUST 1984

NAESP '85

Office of the Superintendent of Public Instruction, State of Washington: Division of Special Services and Professional Programs

PREFACE

The Barrier Resolution Process is governed by the Division of Special Services and Professional Programs, Office of the Superintendent of Public Instruction of the State of Washington, and a steering committee.

The Steering Committee represents the following: Association of Washington School Principals, Washington Association of School Administrators, Washington Education Association and Washington State School Directors Association.

Credit for the original development of the Barrier Resolution Process, which has now been modified somewhat over several years of use, goes to Cliff Gillies, formerly a principal in the Mukilteo School District and now Executive Director of the Washington Interscholastic Activities Association. The process was developed under a grant from OSPI, with the assistance of Niles Wusterbarth, then Title VI-D training coordinator for special education; the original steering committee consisted of representatives from WEA, AWSP, and OSPI. We extend sincere thanks to these individuals.

Financial support for the project is from federal funds (Title VI-B and VI-D), through OSPI; this manual was revised for general use under a State Educational Agency Programming grant (Full Teaming Emphasis: training and resource development for parents, teachers, administrators, and school board members for effective service delivery for handicapped students) from the Division of Personnel Preparation, United States Office of Special Education and Rehabilitative Services. The opinions expressed herein do not necessarily reflect the position of the granting agency, and no official endorsement by that agency should be inferred.

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EXHIBIT A

BARRIER RESOLUTION PROJECT DESCRIPTION

The Barrier Resolution Project is a cooperative effort of: Washington Association of School Administrators (WASA), Association of Washington School Principals (AWSP), Washington Education Association (WEA), Washington State School Directors' Association (WSSDA), and the Office of the Superintendent of Public Instruction (OSPI), Division of Special Services and Professional Programs.

This project is designed to facilitate communication within each participating district, to assist in the development of cooperative problem-solving and planning related to special education. Trainers assist district teams in prioritizing in-district needs for resolution of barriers to effective problem-solving in special education (and its interface with regular education); action plans are developed and follow-up technical assistance is provided.

In the first year of the project, two local school districts (Cheney and Central Valley) participated. The next year, the project provided follow-up for these two districts (under separate small grants) and provided initial activities in four additional districts: Clover Park, Edmonds, Spokane and University Place.

In 1983-84, new districts served were Evergreen, Federal Way, Highline, Naselle-Grays River, Selah, and ESD 123 (with six small local districts).

New districts for the current year are: Bethel, Enumclaw, ESD 101 (with Freeman and Nine Mile Falls), Marysville, Naches Valley, Seattle, Willapa Valley, and Yakima.

Activities will include: team identification of barriers and creation of an in-district action plan to resolve those barriers; training as needed on applicable state and/or federal regulations; and follow-up technical assistance during implementation of the action plan. It is anticipated that three days of training (an initial two-day training, with a day of follow-up assistance approximately one month later) will be provided for each of the new districts.

Training teams are selected by the four professional organizations, in consultation with OSPI. Each training team will include one or two representatives from each of the four organizations. In-district teams to be trained are also nominated by the respective organizations, and will consist of approximately fourteen individuals, to include teachers and administrators from regular and special education programs, and school directors.

This year, funding for the total Barrier Resolution Project will be provided by Title VI-B discretionary funds ($10,000) and Title VI-D training funds ($40,000), for a total of $50,000.

TO THE FACILITATOR

This manual was developed to assist in the Barrier Resolution Process. The manual includes specific instructions, materials and equipment necessary to carry out the process.

KEYS TO SUCCESS

To be successful in the Barrier Resolution Process it is critical that you present yourself to the district team with a purpose to:

* Take an active part in the process by assisting the district wherever possible. (You're not a critical observer of the district's methods and procedures.)

* Remain neutral on issues. (You're not there to judge performance, personal values, quality of service or management style.)

* Clarify expressions of the district's concerns, solutions or opinions. (Try not to confuse issues with your own opinions.)

* And keep sensitive information entrusted to you confidential. (Remember, you're an outsider.)

DISTRICT TEAM

Throughout this process you will have contact with the district team. The district team includes teachers, administrators, support personnel and school board members.

This team will remain together following the initial training period and will become a resource to the district to help resolve other issues. The district may ask the facilitators to provide assistance to the district's team for further training.

GROUP AND INDIVIDUAL RESPONSIBILITIES

The following groups and individuals will be responsible for setting up and following through with the activities identified.

STEERING COMMITTEE RESPONSIBILITIES

(The steering committee is made up of representatives of the participating organizations, role groups, or districts, depending on the organization of the project. The Washington project has one member from each of the four professional organizations, and three representatives--assistant superintendent, state director of special education, and state inservice training coordinator from the Office of the Superintendent of Public Instruction.)

1. Select Facilitators.

   (Facilitators should be good listeners, good in directing group process, able to be objective and non-judgmental; we have found it more effective to use out-of-district facilitators. We suggest using three or more facilitators; currently we use four, one from each professional organization. Our facilitators are selected by their own organizations, and are people actively involved in provision of services to students (a special education director/coordinator, a building principal, a teacher, and a school board member), rather than theoreticians.)

2. If the project is at regional or state level, select districts to receive training.

(Factors we have used in selection include: indication of interest and support from both district administration and local education association, required in our project; geographic distribution; presence of special arrangements such as juvenile correctional institutions, institutions for the severely handicapped, or service delivery cooperatives; and willingness to allow local district team members to serve as trainers for other districts. Districts selected have ranged in total student population from under 500 to over 46,000.)

3. Arrange facilitators' meetings.

(In the Washington project, there are general meetings at the beginning and at the end of each school year, for training of facilitators, review of current issues, scheduling of districts and teams, and revision of the facilitators' and participants' manuals as necessary. Individual district teams of facilitators generally confer by telephone, and in person the evening before training begins, to assign sections of the process.)

4. Manage budget.

(The Washington project uses contracts with the professional organizations and small grants to local school districts to fund activities; followup grants of about $2,000 each are available to local district teams for second- and third-year activities related to the project.)

5. Provide publicity.

(Each year in the spring there is an announcement, made by OSPI to all local districts and local education associations in the state, inviting participation in the project for the coming year. In addition, each professional organization, at the state level, is given an article describing the current year's project for inclusion in a fall newsletter issue, and other written descriptions are provided upon request. Presentations on the project have been given at professional conferences, meetings of inservice coordinators, the State Staff Development Council, and regional special education meetings.

6. Maintain ongoing communication with facilitators.

(Each organization representative should maintain contact with his/her group of facilitators; in Washington, we have about three to five facilitators from each organization.

7. Provide information to participating superintendents, organizations, and/or role groups as necessary.

8. Have at least one steering committee representative attend each training meeting.

DISTRICT RESPONSIBILITIES

1. Select a person to coordinate the district team activities, and to serve as an in-district and district-to-project contact person for all activities relevant to the process. (This person should be a district team member.)

2. Supply materials and equipment listed under District Responsibilities in the Checklist of Supplies later in the section.

3. Commit to a minimum of two consecutive days (including the evening of the first day) of training; commit to one day of followup approximately six weeks after initial training; and commit to one day of followup approximately six months after initial training, all of these to involve all district team members. (Notice of each training should be distributed to team members at least two weeks in advance.)

4. Provide a list of district team members: Each (local) organization selects members to ensure a representative sample of members from grade levels, categorical programs, building administrators, and

support personnel. Suggested team composition for medium or large districts is listed below:

Three regular education teachers

Three special education teachers

Three building principals (preferably one elementary school, one middle/ junior high school, and one secondary)

Three district office administrators (including the special education director

Two school board members

NOTES:

Team composition should be proportional for small districts, as far as possible.

In a very large district, it may be helpful to select one particular geographic area, if the district has regions, or one particular emphasis area, such as programs for mildly handicapped, as focus for the initial team; the project can then be replicated in other areas or programs. The team should still include both regular and special educators.

Teacher representatives are selected by the local education association, and may include related services personnel and/or remedial education personnel.

5. Arrange substitutes, as necessary, for district team members, a minimum of one week before training.

6. Distribute and collect Barrier Resolution pre-questionnaires. (The return date should be at least one week in advance of training, and questionnaires should be made available to the facilitators for their planning meetings before the training.)

7. Provide information to the facilitators and to other district team members on details of training (times, dates, places, list of team members, etc.)

8. Prepare and maintain a summary of plans, activities, and accomplishments of the district teams, to be distributed to team members, facilitators, school board, and the project steering committee, to assist in dealing with further needs of the district team.

9. Commit to allow up to three district team members, jointly selected by the district and the steering committee, to serve (with sending-district reimbursement of substitute costs, travel, and per diem) as trainers, each for one other district.

FACILITATORS

1. Make the necessary time commitment and secure district approval for the following:

   a. Facilitators' meetings: Attend one at the beginning of the school year or project, and one at the end.

   b. Training activities (for each district served): Attend two-day initial and one evening meeting, one-day and one evening meeting approximately six weeks later, and one-day and one evening six-month followup.

2. To allow flexible teaming, be prepared to present all sections of the manual.

3. Communicate with other facilitators to pre-plan the presentation, including sections assigned to each facilitator.

4. Evaluate the progress of the process.

   (Caucus frequently and modify the presentation as needed, considering factors such as group energy level, interest and attention span, need for breaks, and interaction between and within groups. Be aware of environmental factors such as heat, light, seating arrangements, etc., to provide comfort and facilitate participation for team members. Consider any negative/disruptive/manipulative interactions that may arrise within the group, and prepare to deal with them directly or by indirect means such as regrouping.)

5. Select one contact person from the facilitators. He/she will be responsible for the following tasks:

   a. Maintain communication with the district contact person.
   b. Confirm date for training.
   c. Confirm availability of supplies and room accomodations.
   d. Confirm dates, location, facilitators and training content for any followup sessions.
   e. Provide description of Barrier Resolution Process and pre-questionnaire to the district, and collect pre-questionnaires for team use.
   f. Confirm that facilitators are prepared for the meeting.
   g. Distribute, collect and send the steering committee copies of the training session evaluations.
   h. Coordinate arrangement of the meeting room to provide good working environment, dealing with factors such as table arrangement, lighting, ventilation and regrouping of participants as necessary.

OSPI RESPONSIBILITIES

(These may be assumed by the steering committee for a project organized differently.)

1. Coordinate the facilitator training meeting and steering committee meetings.

2. Make initial district contact and ask the district to select a contact person.

3. Distribute the list of facilitators.

4. Provide facilitators and team members with manuals.

5. Obtain funding and serve as the funding agency.

BEFORE YOU BEGIN

ABOUT FACILITIES

We prefer that district teams hold at least the initial two-day meetings outside the local district, far enough away to be in a retreat-type setting and to discourage team members from leaving the meeting to respond to calls from or situations in their own schools. A location away from the district also encourages evening socialization, which can be helpful for team-building.

Consider the following factors in selecting facilities.

1. The meeting room(s): shape; size; heat; light; electrical outlets; built-in screens, chartholders, blackboards, etc.; noise levels from air conditioning, traffic, swimming pools, nearby restaurants or music, adjoining meeting rooms (particularly if amplification or film presentations will be used); restrooms nearby; permission to tape sheets from flip charts on walls.

2. Access for the handicapped: parking, meeting and sleeping rooms, restrooms, restaurants and other services.

3. Food services: availability of group meals or individual checks as needed; best times to break for meals (11:30 or 11:45 is usually better than noon, for example, in a hotel, for faster service);

4. Equipment and supplies: assemble and check equipment and supplies needed; check availability of equipment such as screens and overhead projectors (and charges, if any); check to see if there are arrangements for copying materials if needed (including charges and hours available); check locations of, and learn how to operate, heating, ventilation, lighting, and microphones in meeting room(s); specify number and arrangement of tables, chairs, podium, projection table, registration table, etc.

5. Hotel/motel rooms: availability of (reduced) group rates; accessibility; distance from sleeping rooms to meeting rooms (If sleeping and meeting rooms are in separate buildings, are there covered walkways/corridors in case of inclement weather?)

6. Access to meeting rooms for set-up: When can you get into the meeting room in the morning--and who has the key(s)? (Can you borrow a set?) Can you arrange to use the room (sometimes free of charge) for an evening-before facilitators' meeting and room set-up? Have you checked to make sure that the management knows you want the room for the first evening of the two-day training, so that another evening group isn't scheduled in?

7. Get to know the manager/catering person who will be your contact! Many small snafus can be prevented or easily solved if you have a good working relationship.

ABOUT PREPARATIONS FOR TRAINING

The night before, or the morning of, the initial training meeting, the facilitators should:

1. Prepare name tags for participants (with names only, not roles, to minimize distinctions based on rank/title)

2. Check equipment, supplies, manuals, etc.

3. Arrange (or check arrangement of) tables so that the team can meet as a whole and then easily be split into groups of five to seven people.

4. Confirm responsibilities for specific sections of the training.

5. Review pre-questionnaires completed by district team members to gain an outstanding of the concerns and composition of the group.

CHECKLIST OF SUPPLIES AND EQUIPMENT

PROVIDED BY THE DISTRICT TEAM

___ Overhead projecter (with extra bulbs and overhead pens)

___ Masking tape

___ Three flip charts, with easels

___ Scissors

___ Staples

___ Broad-tip marking pens

___ Blank name tags

___ Extension cords

___ Projection screen

___ Three-hole punch

PROVIDED BY THE FACILITATORS

___ Colored dots

___ Poker chips

___ Facilitators' manual

PROVIDED BY THE STEERING COMMITTEE

___ District team member handbooks

___ Pre-questionnaires

___ Recording forms

___ Evaluation forms

___ Expense/reimbursement forms

Presentation Plan

Materials needed:
Overhead, screen, transparencies

Introductions

1. Facilitators introduce themselves. (Identify which organization/role you represent, and where you're from; be very brief.)

2. Clarify the facilitator's role; after to description in district team book.

3. Ask district members to introduce their partners.

4. Discuss district and team member responsibilities.

The facilitators says:

> Effectiveness of this process will depend on your active participation in the necessary activities and, when you return to your district, on following through with the plans you make while you are here.

Instructions to the Facilitator

1. Provide a brief overview of each process step and discuss anticipated products/outcomes.

2. Provide information on timelines (for lunch, dinner, breaks, etc.), smoking rules, bathrooms, and other practical details.

3. Allow ample time for questions.

HINTS

Ask team members to sit beside someone they don't know well.

Pairs of team members are to interview and introduce each other and tell what the partner expects to get out of the meeting. You can also ask for a "non-resume" item that they would be willing to share (a hobby, an exciting experience, etc.).

If you notice that people are sitting in role or friendship groups, you may want to split the groups differently when you move to the boundary-breaking activity.

Use overhead transparency:

People will support that which they
--create
--understand
--have confidence in
--believe to be an improvement/important

Write an agenda on a flipchart for each day, and revise it as necessary.

Hand out district team handbook (initial section only).

Encourage questions.

Step 1: Boundary Breaking Exercise

Materials needed:
Three sets of poster-size paper
Marking pens

HINTS

Write questions (in short form) on poster sheets.

Facilitator explains purpose of exercise, including the following points:

> We want to create an awareness of your feelings and opinions and the feelings and opinions of others with the use of questions. The questions were designed to highlight special education issues. This group interaction will help to encourage a climate of acceptance and a sense of community.
>
> Since boundary breaking samples a wide range of opinions and feelings, you will find listening carefully necessary to ensure understanding. Acceptance of all responses is given; responses need no rationale. There is no right answer.

Instructions to the Facilitator

Read the questions ahead of time, preferably several times, to be sure that you understand them clearly yourself.

1. Divide the district team into groups. Ask each group to choose a leader.

2. The leader of each group will select a recorder, to record the answers of all members on poster-size paper.

Keep the group to 5-7 people, preferably an odd number.

Check group composition.

Facilitator explains:

> We will give you three sets of questions. You will answer each question in turn. You may pass; you will have one more change to answer.
>
> Remember:
>
> * You need no rationale.
> * Use one to two work responses as much as possible.
> * Listen carefully to your group.

Use the "point system" to select the group leader: Tell everyone to point to his/her choice at your count of three. The person with the most "points" is the group leader.

The last question of each set will give you a chance to ask someone to explain his/her response more fully. The person to whom you make the request may pass.

Your group leader starts with question one and the recorder keeps track of all responses.

After the first question, facilitator says:

For the second question, the person to the right of the leader starts, and each team member answers in turn. For the third question, the next person to the right, and for the fourth question the next, will begin.

The leader will close with question five. Each member in turn may ask any group member for further information.

When each set of questions is done, the recorder will post the group's answers on the wall.

Instructions to Facilitator

1. Ask for a consensus on some items of Set Two (1, 3, 4) and/or Set Three (1, 2, 4).

2. Give the group approximately 30 minutes to reach consensus for the six questions.

HINTS

You may want to draw a diagram to show the way the questions progress!

For the consensus process (below, left):
Stress both diversity and similarity. Encourage group members to look for trends and overlaps in their answers.

Don't throw out the minority reports.

Use a system such as thumbs up/down or the poker chip system to help the groups avoid being influenced by stronger members; they will respond all at once.

To use poker chips: Give each group member one blue chip (for a great, "blue chip" idea), one white chip (neutral) and one red chip (for stopping the idea--a disagreement).

At a count of three, all group members in a given group will "vote" on an item with a thumb or a chip, whichever is being used in that group.

Be careful not to let groups get bogged down.

QUESTIONS

SET 1

GROUP ____________________

(1) What color is the special education program in your school district?

(2) Do all of the students in your school district benefit from the educational programs offered?

(3) If you could grant one personal characteristic to a handicapped student that would increase his/her success, what would that characteristic be?

(4) Should all handicapped students be given the opportunity to participate in regular education classes?

(5) Which answer to the above questions would you like to have more fully explained?

QUESTIONS

SET 2

GROUP ____________________

(1) Do you think a mildly mentally retarded student should be eligible for the honor roll?

(2) You received additional funds. List your three top priorities.

(3) Give one word that best describes special education students.

(4) In your opinion, what is the primary reason that a regular education teacher may not want a handicapped student in his/her classroom?

(5) Which of the above answers would you like to have more fully explained?

QUESTIONS

SET 3

GROUP ____________________

(1) What is the greatest need in special education today in your school district?

(2) Give one word that best describes the future of special education in your school district.

(3) On a scale of one (lowest) to ten (highest), rate the following (please read all three before you answer):

A. What would you like your impact to be on the quality of special education in your school district?

B. Rate the impact you do have on the quality of special education in your school district.

C. Given your job description, what do you perceive your impact should be?

(4) If you were a special education student, what would be the most important concept that you could learn from you teacher?

(5) Which of the above answers would you like to have more fully explained?

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Step 2A: Identifying and Ranking Barriers

HINTS

Materials needed:

Copies of Barrier Worksheep No. 1

Poster size copies of Barrier Worksheet No. 2

Facilitator explains:

Purpose of this exercise:

* To identify barriers to the education of handicapped students in your district

* Rank order barriers within groups

* Rank order barriers between groups

* Establish priority of barriers

Instructions to Facilitator

1. Hand out individual Worksheet No. 1 to each team member.

2. Ask each team member to list three barriers to the education of the handicapped students in their district.

Refer to the boundary breaking exercise for one possible source of barriers. Make sure the members expand their thinking to find other sources as well.

Use an example that shows specific barriers: "Transportation services don't allow some students to attend an appropriate setting," might be better said, "A bus ride of 90 minutes to Public School 735 is too long."

Each member will list three barriers to education of handicapped students on Work Sheet No. 1.

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Instructions to Facilitator

1. Ask recorders to list all barriers within each small group.

2. Share the lists within each small group.

3. Condense lists by combining similar barriers within small groups.

4. Place each small group list on poster paper.

5. Post small group lists; reform team into one large group for discussion.

6. Condense lists by combining similar barriers within the total group.

7. Rank order barriers.

8. Select the top three barriers, those which the group ranked highest. (If you have two barriers which are ranked the same, take the one with the most stickers.)

9. TAKE A BREAK. Facilitators will meet to select one of the group's barriers, but not one of the top three, to use as an example for the group in preparation for the next step of the process.

HINTS

Whether it is in the small group or the large group, recognize the fact that combining can mean compromising. See if the members who originated the ideas are willing to combine and compromise where necessary--but don't let ideas be list that aren't the same.

Let the district team members do the work--resist the temptation to "clarify."

When it is time for step 7, give each person three or five small round stickers (½"). (Use colored stickers; they show up better on the posters.) Assign a value to each sticker, either by color or by a number written on the sticker. (If numbers are used, clarify which numbers are the most valuable.)

All group members get up and put their stickers next to the issues they are most interested in working on, on the large condensed list on the wall.

Count the values assigned to each barrier, and select the three most heavily weighted by the district team.

INDIVIDUAL WORKSHEET #1

List three leading barriers to education of handicapped students in your district. Add a few specific problems related to each barrier.

Barrier #1 ______________________________

Specific problems ______________________________

____

____

Barrier #2 ______________________________

Specific problems ______________________________

____

____

Barrier #3 ______________________________

Specific problems ______________________________

____

____

Step 2B: <u>Completing Barrier Worksheet No.2</u>

Materials needed:

Poster size Worksheet No. 2
(made by facilitator)
Marking pens

Facilitator says:

> For each barrier, list the cause(s), the ideal condition, and what needs to be done to work toward the ideal condition.

Instructions to Facilitator

1. Model one barrier (the same one used earlier as an example) with the entire group; then divide the district team into smaller groups.

2. Assign a chosen barrier to each group, with a recorder in each group; collect and post poster size worksheets when complete.

3. One facilitator should work with each small group, to be available to clarify the task as needed.

4. Groups will be expected to work through caused and ideal conditions and to brainstorm solutions.

5. Check the group energy level; if time allows, a first-day summary (where we've been and where we're going) may be done at this point. You may also do a first-day evaluation at this point.

6. BREAK FOR DINNER, making arrangements for time and place to gather for the evening session.

HINTS

Regular size copies of Worksheet No. 2, for team members' handbooks, may be distributed at the beginning or at the end of this part of the process.

If a group is progressing well, you may encourage the group to begin to look at sequencing solutions.

WORKSHEET #2

GROUP ______________________ BARRIER ______________________

CAUSES	IDEAL CONDITIONS	SOLUTIONS

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Step 2C: Evening Session

HINTS

Purposes:

1. Informal sharing
   a) Solutions tried elsewhere
   b) Special education terminology and law as appropriate to barriers chosen and knowledge levels demonstrated by the district team

Try to help non-special-ed. team members have enough information to feel that they can contribute to the group; some of this may involve educators to give information about program options, referral, etc.

2. Social interaction: team-building

Structure:

Facilitator talks with the group at the end of the afternoon session to discuss content option and set an informal tone (casual dress and informal interaction).

Session length will be individualized for each group, but will be approximately two hours.

Facilitators' tasks to prepare for Day 2:

Prepare model for next step, using the same model barrier used for earlier steps.

Review group process from Day 1. Do groups need to be rearranged? What can be done to involve those who are not fully participating? Are there any issues that need to be "gotten out of the way" in order to allow the group to progress?

Confirm assignments for Day 2.

Prepare materials as needed.

RELAX!

Beginning Day 2

HINTS

Instructions to Facilitator

1. Greet the group.

Try to start on time.

2. Review the process and accomplishments of Day 1.

Congratulate them!

3. Outline the process and agenda for Day 2, including estimated time you'll finish and products the team will have at that time. (You may wish to remind them that there will be followup meetings, with content built around their plans and needs for additional information, and invite them to jot down any training needs that may come up during the day's activities, for use in planning for your return visits.)

Be sure to allow time for check-out from the hotel. (Check on required time for checking out; some hotels will allow groups to adjust the time somewhat--from 11 a.m. to one o'clock, for example--which would allow guests to check out during the lunch break.)

4. Do any necessary rearranging of group membership in small groups, based on your observations from the day before.

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Step 3: Sequencing Activities

HINTS

Materials needed:

Poster size copies of Worksheets No. 3 and 4 (made by facilitators), at least one per small group

Marking pens

Regular size copies of worksheets for team members' handbooks

Instructions to the Facilitator

1. Model one barrier--the same one used in Day 1 for demonstration, not one of the district's top three--for the entire team. Looking at Worksheet #2 developed during Day 1, consider the list of solutions in the light of the following questions for implementation:

   1) What comes first?

   2) What comes next?

   3) What tends to group together?

   4) What ends the process?

   Complete Worksheet No. 3

Depending on the speed with which the team is moving and on the group process, you may want to:

1) present your own (facilitators' team) process followed and show a finished worksheet, or

2) invite the district team to work through the process with you

2. Review the district team's three barriers (briefly), adding any additional solutions that may have been thought of during the evening session.

3. Assign one barrier to each group; one facilitator meets with each group.

4. Ask the groups to complete Worksheet No. 3, using the solutions developed for "their" barriers and the four implementation questions.

5. Indicate that this activity is the day's first step toward the development of an action plan which the district can use to enhance services.

If groups see that their solutions fall in several distinct strands of activity, it will help them to complete a separate Worksheet No. 3 for each strand--this will make Worksheet No. 4 easier.

6. When the solutions have been transferred to Worksheet No. 3, have the group assign a letter and/or number to each task in sequence.

7. Model completion of Worksheet No. 4, for the barrier previously used for demonstration. Talk through the process of developing timelines (with realistic intervals), using the four implementation questions and looking at the interrelationships of the strands. Diagram the flow (using task numbers and/or letters assigned in Step 6 above to designate tasks) and write in the appropriate timelines.

8. Have small groups complete Worksheet No. 4 for their assigned barriers.

9. Have small groups share their worksheets with the total team. (As each group shares, it may become apparent that one group's proposed activities may have an impact on another group's timelines, or that activities may overlap or even conflict. Make whatever revisions are necessary before going on to the next step.)

HINTS

If there are several strands, the group may assign a letter for each strand; tasks then become A1, A2, A3, B1, B2, B3 C1, C2 . . .

The process is easier to demonstrate with two or three strands, to show how to consider interrelationships, but don't make the example so complicated that it confuses or discourages the team.

You may wish to do all tasks from a given strand in circles: A1 --- A2 (etc.) and other strands in other shapes, but the purpose of this exercise is clarity, not complexity or artistic expression.

WORKSHEET #3

GROUP ______________________ BARRIER ______________________

SOLUTION ACTIVITIES

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WORKSHEET #4

SEQUENCING ACTIVITIES

GROUP ____________________ BARRIER ____________________

TIMELINE

Step 4: Assigning Tasks

HINTS

Materials needed:

Poster size copies of Worksheet No. 5 (made by facilitators), at least one per small group

Marking pens

Regular size copies of worksheet for team members' handbooks

Copies of definitions of codes and example for team members' handbooks

You may wish to leave a transparency that shows the definitions of the basic codes (C,A,R,I,N) on the overhead as the groups work through this process.

The facilitators says (to the total team):

The purpose of this exercise is:

* to propose assignments for key individuals and groups involved in resolving barriers in your district,

* to define the lines of communication to keep people properly informed of the process, and

* to help you plan to keep key individuals and groups involved in decision-making and implementation.

We recognize that responsibilities may change once the district team members get back to the district. That is why we use the work "propose" when dealing with assignments, particularly for people not present during the exercise.

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Instructions to the Facilitator

1. Review the definitions of the coding terms and review the sample provided, working with the entire team.

2. Using the demonstration barrier, complete Worksheet No. 5 as model, working with the entire team.

3. Have small groups complete Worksheet No. 5 for "their" assigned barriers, with a facilitator working with each group.

4. Have small groups report back to the larger group. (Again, look for overlaps, conflicts, or patterns--are all the tasks assigned to one person or group? Remembering that it's not your job to change the district's management structure, look at possible alternatives if necessary.)

5. Listing tasks: optional step
Depending on time remaining and desires of the district team, a facilitator or the district team's recorder may complete Worksheet No. 6; this may also be done after the team returns to the district and distributed with other summary materials.

HINTS

For your demonstration, you may do a theoretical set of groups and individuals (by roles), or you may ask the team to describe what groups and individuals would be involved in their district. In either case, try to be sure that major groups are all included, such as: school board, superintendent, special education director, other district administrators, principals, regular and special education teachers, parents, related service personnel, classified staff, advisory committees or councils, relevant community groups or agencies, etc.

Consultation: Dialogue must be held with this person or group prior to action; this person or group may provide needed information, may serve as primary advisor, and may affect what you do or how you do it. (Consultation often should include consumers as well as authorities for the process.)

Authority: This person or group is the one from whom approval must be sought, by whom the final commitment is made, and from whom delegation of task occurs.

Responsibility: This person or group is assigned by the person in authority to see that the work gets done; assignment is by function or by area, to bring the task(s) to closure; work may be delegated further, to implementers, or may be done directly by those with responsibility for specific areas.

Implementation: These people are the "worker bees," who accomplish tasks assigned by those with responsibility for specific areas.

Notification: These people or groups are informed about the process; information may be given before, during, or after the process, or on a continuing basis, depending on their specific needs for information. This is a <u>one-way</u> process, as opposed to consultation, which is a dialogue, although notification does not (and should not) preclude feedback from those notified about the process.

EXAMPLE

A school district decides to try to decentralize its special education programs from regional centers within the district to a neighborhood school base wherever possible. The following groups might be involved:

Consultation:

--superintendent and/or school board, for policy issues and potential impact on budget, administrative structure, transportation, and other district-wide issues

--special education parent advisory council, for input on implications for (and potential reactions/concerns of) parents

--transportation supervisor, for information and advice about implications for bus routes and schedules

--personnel director, for discussion on personnel needs, possible shifting of staff

--principals, for impact on specific buildings (space, schedule, physical plant modifications, staffing, etc.)

--special education director, for planning strategies and rationale for change

--associations for certified and/or classified staff, to discuss implications for staff

Authority:

--The superintendent, acting as designee of the school board, approves the process and commits necessary staff and resources.

Responsibility:

(The superintendent has designated these individuals or groups to assist in carrying out necessary functions.)

--special education director, to coordinate planning and notification

--transportation supervisor, to reorganize bus routes and schedules

--personnel director, to reassign/hire staff as necessary

--building principals, to make necessary arrangements for rooms, schedules, etc.

--staff associations and parent advisory council, to inform their constituents

Implementation:

--special education coordinators/teachers, to assign students to classes, plan schedules, revise IEPs with individual parents, etc.

--district newsletter editor, to provide constructive publicity in district publications and local media

--bus drivers

--itinerant staff, to revise therapy/meeting schedules as needed

Notification:

--parents

--bus drivers

--school secretaries

--certified and classified staff (both those directly involved and those in receiving schools)

NOTE: Implementation and notification should involve careful consideration of possible training needs of personnel involved.

--information/awareness level:

--what will happen, why, when (the facts)

--survival skills (for a new program with behaviorally disabled students, for example, playground aides, bus drivers, and the school secretary may need to learn coping strategies and acceptable procedures for dealing with out-of-control behaviors; or for severely physically handicapped students, school staff may need help learning--and being confident and comfortable about--resuscitation procedures)

--attitudes

--opportunities for staff and parents to deal with factors such as new locations and people, feelings about handicaps or handicapped children, separation from known and valued prior staff/classes, etc.

--practice/application

--skill training

--participation in ongoing planning and evaluation

WORKSHEET #5

ASSIGNMENTS

BARRIER ____________________

GROUP ____________________

C: Consultation
A: Authority
R: Responsibility
I: Implementation
N: Notification

	TASKS									
PERSONS/GROUPS										

CODE:

C: Consultation
A: Authority
R: Responsibility
I: Implementation
N: Notification

WORKSHEET #6

TASK LIST

SOLUTION ACTIVITY ______________________________

TASK	PERSON RESPONSIBLE	CODE	TIMELINE

Step 6: Closure

HINTS

Instructions to the Facilitator

1. Summarize the process and results.

2. Discuss plans for followup:

   * Schedule the next meeting for approximately six weeks later

   * discuss plans for followup session, including:

     1) reporting by the district team on progress on the action plan

     2) additional information/training which could be provided by facilitators/district team members at the followup

     3) distribution of summaries of the initial session to all participants, steering committee, facilitators, local school board (specifying the person responsible and what materials will be provided) prior to the next session

   * remind the district team that there will be a second followup at about six months af er the initial meeting

3. Distribute the evaluation forms and ask district team members to complete and return them before they leave.

4. Thank the people!

   * the superintendent, if present

   * the contact person

   * the district team members

   * the facilitators

   * steering committee representatives, if present

   * and...(others as appropriate)

In scheduling the next meeting, consider holidays, end of term, content of action plan, etc., but try to keep the followup as close as possible to the six-week, six-month schedule.

Additional training may include items such as: specific service delivery models; special education regulations; information on the district's structures for management, budget, and/or instruction; small task forces or total group further planning (or how-to's for planning), etc.

Be sure the district's recorder or contact person gets all charts and written materials needed by the district.

Copies (or originals) of the evaluation forms should be provided to the steering committee as soon as possible. (You may wish to have a short on-site debriefing with the district contact person after the meeting.)

Make a strong effort to end the meeting at the time you said it would be finished.

Review the evaluation forms and look for any parts of the process that may be strengthened the next time they are presented.

Keep notes about the facility for future reference, for the benefit of others who may need a place to meet.

6. Before the followup:

* be sure all facilitators have copies of the summaries
* be sure you have agreed on assignments
* assemble necessary materials and equipment
* check time, place, agenda with district contact person

HINTS

Facilitators usually prefer to meet the evening before the followup meeting to set up the the meeting room and do some last-minute coordination.

Six-month followup meetings usually follow a similar format.

BARRIER RESOLUTION PROCESS EVALUATION

Please check one:

Teacher _____ Support Person _____ Building Principal _____
Central Office Administrator _____ School Director _____

Please rate the Barrier Resolution Process. Also include your suggestions for improvement. Thank you.

BOUNDARY BREAKING EXERCISE

Very Effective 5 4 3 2 1 Not Effective

Comments: ______________________________

____

IDENTIFYING BARRIERS

Very Effective 5 4 3 2 1 Not Effective

Comments: ______________________________

____

RANKING BARRIERS

Very Effective 5 4 3 2 1 Not Effective

Comments: ______________________________

____

SOLUTION ACTIVITY SEQUENCE

Very Effective 5 4 3 2 1 Not Effective

Comments: ______________________________

____

CARIN

Very Effective 5 4 3 2 1 Not Effective

Comments: ______________________________

____

FINAL ACTION PLAN

Very Effective 5 4 3 2 1 Not Effective

Comments: ______________________________

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