Planning
Sharing Individuals Parents
Case Manager Services Knowledge
Intervention Support Tier 1, 2, 3 Meeting Agenda

# School-Based Teams:
# Best Practices

Staff Student Information Process
Referral Performance Minutes Skills
Inclusion
Discussion

Chilliwack
School District

Produced by
The Chilliwack School District Student Services Department
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# About this Document

School-based teams are an integral part of the support system that each school provides for its students, families, and staff members.  This document is intended to provide suggestions, best practice descriptions, helpful hints and tips, and British Columbia Ministry of Education information to assist all Chilliwack School District schools when creating and maintaining efficient, productive, and purposeful school-based teams.

Teachers and educational assistants are covered by collective agreements between the unions that represent them and the employer. Many of these agreements have provisions that set out some of the conditions relevant to school-based teams. Collective agreements must be followed and take precedence.

This document was created in collaboration with Chilliwack School District resource teachers, child and youth care workers, learning assistance teachers, counsellors, classroom teachers, Aboriginal Education staff, principals and vice principals, Student Services staff, and parents. Thank you, for working together to create a resource designed to benefit the students, staff and families of the Chilliwack School District.

**Thank you**…..Karen Angelucci, Danielle Bennett, Jackie Berkes, Jason Borseth, Danna Burton, Brenda Calendino, Mike Cameron, Diane Chapman, Jaimee Charlie, Reid Clark, Cathy Comb, Jeff Dartnell, Chayne den Ouden, Katie Diaz, Brad Driscoll, Lisa Ego, Jess Friesen, Christine Goodman, Janet Hall, Kim Hancock, Dan Heisler, Brad Johnston, Paula Jordan, Alison Kaye, Kelly Keiwan, Leah Kelley, Ed Klettke, Michelle Kohuch, Grant Kushniryk, Liz Mackenzie, Dave Manuel, Katie Moran, Sharilyn Mordaunt, Duane Morelli, Brenda Point, Colin Reid, Michelle Reilly, Kathleen Rowlands, Josh Sandburg, Lynnet Schramm, Deneen Scott, Dave Shepherd, Galen Soon, Kris Sward, Angela Utley, Lynnette Van Winkle, Leslie Waddington and Shasha White.

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## "Tips from a Team"

Throughout this document you will find "Tips from a Team". These hints and helpful tips have been recommended by members of well-functioning school-based teams in the Chilliwack School District. They are tried, tested and true advice from school-based teams who work to support our students.

## "Tips from a Parent"

Throughout this document you will also find "Tips from a Parent". These hints and helpful tips have been recommended by parents who have experience participating as members of a school-based team. These tips are positive suggestions that may assist school-based teams as they work with parents to support our students.

# What is a school-based team?

A school-based team is a core group of staff within a school who meet on a regular basis to problem solve, make suggestions, and plan interventions for students who are struggling with any aspect of their education.

A school-based team's structure may take on a slightly different look depending on the needs of the staff and the students.

A school that may have a higher number of referrals, may have school-based team "referral" meetings as well as smaller school-based team meetings in order to create an efficient process for supporting students. The larger school-based team "referral" meetings will have multiple students on the agenda, while smaller school-based team meetings will focus on just one student.

During a school-based team "referral" meeting, the team will ensure that a case-manager is in place for each referred student and may suggest initial intervention strategies for the student, teacher, or other school-based staff. When the case manager feels that more in-depth problem solving is necessary, a school-based team meeting will be called which focusses on just one particular student.

While a school-based team "referral" meeting will focus on ensuring that every referred student is being monitored and has a key support person within the school, a school-based team meeting will provide an extended amount of time and more opportunity for additional team members to participate in the planning process for one student.

A school that may not have as many referrals for students who are struggling, may be able to support students in a timely manner with regular school-based team meetings and may not require school-based team "referral" meetings.

 "A school-based team is an ongoing team of school-based personnel which has a formal role to play as a problem-solving unit in assisting classroom teachers to develop and implement instructional and/or management strategies and to co-ordinate support resources for students with special needs within the school"

 *Special Education Services: A Manual of Policies, Procedures and Guidelines* (BC Ministry of Education, 2016, Glossary)

# School-Based Team Members

The ability of a school-based team to support a student who is struggling is greatly enhanced when it can draw on the collective knowledge and experience of multiple professionals within the school and the district, as well as those individuals supporting the student outside of the school.

Each member of a school-based team brings with them a unique perspective, specialized training, and a multitude of experience specific to their role within the school. Parents and guardians, and others who support a student outside of the school, are often able to assist the team when problem solving and brainstorming supports.

**School-based team membership usually includes:**

- The school principal and/or vice principal
- A learning assistance teacher and/or resource teacher
- At least one classroom teacher (often the referring teacher)
- A school counsellor

**Additional membership (when appropriate):**

- The student's parents or guardians
- The student (in consultation with parents or guardians)
- Student/Family advocate or support person
- Additional school staff (Aboriginal support workers, child and youth care workers, classroom teachers, educational assistants, inclusion support teachers, etc.)
- District staff
- Outside agency staff

"Planning and service delivery works best when parents and students are active participants in the process"
*Special Education Services: A Manual of Policies, Procedures and Guidelines* (BC Ministry of Education, 2016, p. 19)

Regardless of whether or not they will be attending the meeting, parents or guardians should always be informed of a referral to the school-based team. School-based team referrals are considered a Tier 2 support when using a Response to Intervention (RTI) approach.

# Roles and Responsibilities

A well-functioning school-based team assigns roles and responsibilities among team members in order to ensure that:

- supports and interventions are provided to students as soon as possible
- team members and key members of the student's support team are notified of on-going plans to support the student
- meetings are run efficiently and on-time
- interventions and decisions are documented and provided to parents and stored securely in a student's file.

When organizing a school-based team, team members should ensure that at least one person takes on each of the following roles:

**Meeting Chair**: This team member ensures that the meeting discussion is solution-focused and that it follows the items on the agenda. This team member will also ensure the meeting runs in a timely fashion.

**Recorder:** This team member records the minutes of the meeting and distributes the finalized minutes. This team member will also co-ordinate filing the minutes within the school. (see p.12 for information about the distribution and filing of meeting minutes)

**Co-ordinator:** This team member schedules the school-based team meeting, informs the participants of the date and time, and creates the agenda from the referrals.

**Tips from a Team:**
Some school-based teams may have team members who take on multiple roles. Other school-based teams may rotate the roles and responsibilities among team members throughout the year (e.g. switch roles each term/semester). As long as all of the roles and responsibilities are looked after, any type of team organization can work well.

# What is the function of the team?

When students are identified who are not responding to high-level differentiated instruction in the classroom, a referral to the school-based team may occur. In each school, the role of the school-based team may vary depending on the type of supports required by the students and staff. There are, however, some functions of the school-based team that are universal.

School-based teams:

- Provide extended consultation and problem-solving on possible classroom strategies for teachers and students
- Plan for and co-ordinate interventions and services for students who may be struggling
- Provide access to additional school, district, and community support services
- Recommend and organize extended assessments (Level A, B, and C)
- Appoint a case manager for all students who are supported by the team
- Communicate a student's intervention plan to staff members and the student's parents or guardians
- Co-ordinate school and community services to avoid duplication
- Facilitate the continuity of supports when students transition from grade to grade and between schools or districts
- Consult with school staff on whether to provide letter grades to students not working on grade-level goals.
- Advise on the appropriate level of support for students based on a needs assessment
- Recommend support and assistance for staff members who are working with students who may be struggling

**Tips from a Team:**
A school-based team is a great venue to suggest, discuss and complete Ministry of Education category referral forms or category removal forms. By discussing these items at a school-based team meeting, the entire team's capacity to know what is required for each category and which students should be recommended for each category is increased.

**Tips from a Team:**
It can be helpful to review the function and processes of a school-based team annually to make sure the team is meeting the needs of the students, the staff, and parents. A school-based team self-evaluation rubric can be found on page 14.

# Process

A school-based team should create a process for referrals, meeting preparation, meetings and follow-up activities that occur after the meeting. Having a consistent process will be appreciated by everyone involved.

### Referrals

A referral to the school-based team may be made by a classroom teacher, parents or guardians, or another school staff member. A standardized referral form is highly recommended and not only helps to organize and process referrals, it also helps with record keeping as a referral form documents a base-line of performance that can be utilized when reviewing the effectiveness of recommended interventions.

A standard referral form should include (at a minimum):

- The student's identification information (name, grade, date of birth, Ministry category, current case manager, etc.)
- The reason for the referral and main area(s) of concern
- Strategies and interventions already implemented and their level of success (Tier 1 and possibly Tier 2)
- Suggestions for future interventions, strategies or referrals for service
- Current level of performance or observations (academic, behavioural, social, emotional, etc.)
- Description of the anticipated or hopeful outcome of the school-based team referral

It is helpful for a referral form to identify the steps and interventions that should already have taken place prior to a referral being made. Tier 1 interventions should always take place prior to a referral to the school-based team. A referral to the school-based team is considered a Tier 2 intervention.

A few examples of school-based team referral forms can be found on page 20.

"Individual schools establish procedures to support collaborative consultation and planning"
*Special Education Services: A Manual of Policies, Procedures and Guidelines* (BC Ministry of Education, 2016, p. 12)

"Procedures should be in place to:
- Ensure information is promptly shared
- Plan for and facilitate transitions
- Ensure consistency in reporting and documenting plans
- Promote communication and collaborative decision-making between the school and home
- Communicate planning decisions to parents, student and appropriate staff; and
- Resolve differences effectively"
- *Special Education Services: A Manual of Policies, Procedures and Guidelines* (BC Ministry of Education, 2016, p. 13)

## Meeting Preparation

Prior to the school-based team meeting, an agenda should be created and sent out to everyone who has been invited to the meeting.

A standard agenda should include (at a minimum):

- The time, date, and place of the meeting
- The name of the student who is being referred and any specific information that would be important to have before-hand (reason for referral, etc.)
- The names of the individuals who have been invited to the meeting

The agenda should be sent out prior to the meeting and with enough time for the team members to gather supporting information and documentation that may assist with the team's discussion.

In addition to the information provided on the school-based team referral form, the following information may be helpful to collect and discuss during the meeting:

- attendance records
- incident reports
- a current IEP
- previous report card marks
- classroom, school, and home observations
- information regarding outside agency supports already in place
- previous assessment results (Level A, B, or C)

Any team members with first-hand knowledge of the student should be encouraged to share that knowledge at the meeting.

**Tips from a Team:**
The process that is recommended for a school-based team meeting is the same process that is recommended for school-based team "referral" meeting. The only difference between the two processes is that multiple students will be referred and discussed during a school-based team "referral" meeting as opposed to just one student being the focus at a school-based team meeting.

**Tips from a Parent:**
When inviting parents or guardians to a school-based team meeting, be sure to describe the meeting format and structure to them ahead of time and let them know what information would be helpful for them to bring.

**Tips from a Team:**
Remember to ensure student information is kept confidential. If you are printing paper copies of agendas or minutes, they should be securely stored or shredded after use.

**The Meeting**

During the school-based team meeting, the discussion should be student and solution-focused.

A process that works well for school-based team discussions begins by discussing the student's educational background and current level of performance. Next, the team can identify the student's strengths and area(s) where they are currently struggling. Lastly, the team can brainstorm and suggest interventions and strategies for the student and their support team.

If a case manager has not already been assigned to the student, one should be assigned at the school-based team meeting. This case manager will work with/as the point person who will coordinate the interventions and strategies that are recommended.

The Meeting Chair will help to moderate the discussion and the Recorder will take the minutes.

Standard minutes should include (at a minimum):

- The time, date, and place of the meeting
- The names of the team members attending the meeting
- The names of the student and their case manager
- A summary of the student's current level of performance including the identified area of concern
- Recommended interventions or strategies that will be implemented for the student
- Identified next steps in moving forward with the intervention including the names of those responsible for each action.

**Tips from a Team:**
It can be difficult to schedule school-based team meetings at a time that works well for all team members. When meeting outside of the timetable, a convenient location, adhering to a tight timeline, and providing snacks will often be appreciated.

**Tips from a Parent:**
It is important to schedule plenty of time for school-based team meetings. If there is not enough time to discuss everything on the agenda, schedule a follow-up meeting before adjourning to ensure parents or guardians know that the discussion is ongoing.

**Tips from a Team:**
Taking minutes on a computer and sharing them electronically can make it easy for school-based team members to access and look back at previous interventions and strategies. This can be helpful when planning future supports.

**After the Meeting**

Detailed school-based team meeting minutes and an effective distribution and filing process are essential when planning successful interventions for students.

At the conclusion of the school-based team meeting, a copy of the meeting minutes should be printed and placed in the student's LA/School Student Services file. The LA/School Student Services files are typically located in a lockable filing cabinet in a Learning Assistance room, Resource room, or occasionally in a Counselling office or school's main office. This ensures that there is a central location where school staff can look for information regarding a student's previous and current interventions and support planning.

By placing a copy of the school-based team minutes in a student's LA/School Student Services file, we ensure that the most current intervention, support and planning information will travel with the student should they transition to another school or district.

In addition to filing a hard copy of the meeting minutes in the student's LA/School Student Services file, copies of the minutes should also be distributed to all members of the school-based team including the student's parents or guardians. The distribution of the minutes can be via electronic means or hardcopy.

It is also helpful to distribute the meeting minutes to school staff members who may work with the student. By sharing the meeting minutes in this way, everyone who is a part of the student's support team is working with the same information and from the same plan.

If there is a future school-based team meeting for the student, it may be beneficial to begin that meeting by reviewing the previous meeting's minutes.

**Tips from a Team:**
It is beneficial to share school-based team meeting minutes with all school staff that work with a student. That may include teachers, EAs, CYCWs, Aboriginal Education support staff, enrolling and non-enrolling staff, etc.

# District Student Services Supports

Student Services is a school district department which works in partnership with schools when supporting students with exceptionalities. When school-based teams support students beyond Tier 2, as they move toward implementing Tier 3 supports, it may be helpful to contact Student Services personnel to assist with planning, suggest or provide interventions, or administer a level C assessment. A referral for Student Services support is generally made by school-based resource teachers, learning assistance teachers, counselors, or inclusion support teachers, and must be approved by the school principal or vice principal.

The Student Services Department can provide:

- Augmentative and Alternative Communication Services
- Homebound Learning Services
- Gifted Learning Services
- Occupational Therapy and Physical Therapy Services
- Educational Psychologist Services
- Deaf and Hard of Hearing Services
- Visually Impaired Services
- English Language Learner (ELL) Services
- English Skills Development (ESD) Services
- Mental Health Support Services
- Behaviour Support Services
- Speech and Language Pathology Services

A Student Services referral form is used to request the services mentioned above. The most up-to-date version of the Student Services referral form can be found on the Student Services page of the School District SharePoint site. If you are planning supports for a student who is already utilizing these services, it is important to involve the Student Services staff that are working with that student. Student Services staff members who are supporting a student will make all efforts to participate in school-based team meetings and IEP planning meetings.

# School-Based Team Self-Evaluation Rubric

School-based teams may change and evolve over time. A change in student needs, new staff members or school-based team members, and structural or scheduling changes can all affect the function of a school-based team. It is recommended that all school-based teams set aside time each year to review their processes and function. The following rubric can be useful as a self-evaluation tool for school-based teams. If this rubric is used by the school-based team on an annual basis, areas for improvement or change can be easily identified and goals for the year can be set.

| | | Beginning | Accomplished | Exemplary |
|---|---|---|---|---|
| **Staff Understanding and Commitment** | Our staff members have little knowledge of the function and purpose of the school-based team. | Our staff members have some knowledge of the function and purpose of the school-based team. The team shares information with the staff when requested. | Our staff members understand the function and purpose of the school-based team. The team shares information with the staff on a regular basis. The staff assists the school-based team when necessary. | Our staff members understand the function and purpose of the school-based team. The team shares information with the staff on a regular basis. Our team feels supported by the staff at all times in their work as a school-based team. |
| **Roles and Responsibilities of the Team Members** | Roles and responsibilities of the school-based team members are unclear and unassigned. | Roles and responsibilities of the school-based team members have been assigned but may be unclear to some. | Roles and responsibilities of the school-based team members have been assigned. Team members are comfortable in their roles on the school-based team and understand and fulfill the responsibilities of those roles. | Roles and responsibilities of the school-based team members have been assigned. Team members are comfortable in their roles on the school-based team and understand and fulfill the responsibilities of those roles. The staff is aware of who has taken on these roles and their responsibilities. |
| **Case Management for Referrals** | Our team does not assign case managers in a collaborative manner for all referred students who require follow-up. | Our team assigns case managers in a collaborative manner for all referred students who require follow-up. | Our team assigns case managers in a collaborative manner for all referred students who require follow-up. The case managers sometimes provide updates to the school-based team. | Our team assigns case managers in a collaborative manner for all referred students who require follow-up. The case managers always provide updates to the school-based team. |

| | | | | |
|---|---|---|---|---|
| **Pre-Referral Interventions** | Our staff is not aware of the pre-referral interventions that should generally occur prior to a school-based team referral. | Our staff has been informed of the pre-referral interventions that should generally occur prior to a school-based team referral. These interventions are sometimes completed. | Our staff has been informed of the pre-referral interventions that should generally occur prior to a school-based team referral. These interventions are always completed. | Our referral form requires that pre-referral interventions have been completed. These interventions are always completed and always indicated on the referral form. |
| **Referrals** | Our team does not have a formalized referral process. | Our team has a formalized referral process. | Our team has a formalized referral process utilizing a standardized referral form. | Our team has a formalized referral process utilizing a standardized referral form. All staff members know how to access the form and have been instructed on how to complete it. |
| **Meeting Schedule** | Our school-based team does not meet on a regular basis. | Our school-based team meets on a regular basis. | Our school-based team meets on a regular basis. The time and place of the meeting is convenient for team members. | Our school-based team meets on a regular basis. The time and place of the meeting is convenient for team members. The staff is informed of the meeting time and location in advance. |
| **Meeting Format** | Our school-based team meetings do not follow an agenda and are not student and solution focused. | Our school-based team meetings follow an agenda and are focused on solutions and the student most of the time. | Our school-based team meetings follow an agenda and are focused on solutions and the student all of the time. | Our school-based team meetings follow an agenda and are focused on solutions and the student all of the time. Our team members leave with clearly identified actions to support the students. |
| **Timelines** | Our school-based team does not send out agendas with enough time for team members to gather supporting information or documentation. Our minutes are not sent out soon after our school-based team meetings. | Our school-based team sometimes sends out agendas with enough time for team members to gather supporting information or documentation. Our minutes are sometimes sent out soon after our school-based team meetings. | Our school-based team always sends out agendas with enough time for team members to gather supporting information or documentation. Our minutes are always sent out soon after our school-based team meetings. | Our school-based team always sends out agendas with enough time for team members to gather supporting information or documentation. Our minutes are always sent out soon after our school-based team meetings. Our staff can predict when agendas and minutes will be sent out as this occurs on a regular schedule. |

| | | | | |
|---|---|---|---|---|
| **Minutes** | Our school-based team minutes do not utilize a standard format. | Our school-based team minutes utilize a standard format and may identify the students to be discussed at the meeting. | Our school-based team minutes utilize a standard format and identify the students to be discussed at the meeting. The actions and interventions resulting from the meeting are clearly articulated. | Our school-based team minutes utilize a standard format and identify the students to be discussed at the meeting. The actions and interventions resulting from the meeting are clearly articulated with a case manager identified and assigned to each student. |
| **Distribution and Filing Process** | Filing and distributing of the school-based team minutes is not consistent in our school. | Our school-based team either files the minutes in a student's LA/School Student Services file <u>or</u> distributes the minutes to staff, but not both consistently. | Our school-based team consistently files the minutes in a student's LA/School Student Services file <u>and</u> distributes the minutes to staff and the student's parents or guardians. | Our school-based team consistently files the minutes in a student's LA/School Student Services file <u>and</u> distributes the minutes to staff and the student's parents or guardians. All staff members access previous minutes when planning supports for their students. |
| **Recommending, Accessing and Utilizing District and Community Resources** | Our team members are not aware of who to contact to access district or community resources. We do not often recommend these supports. | Our team has some understanding of who we can contact to access district and community resources. We occasionally recommend these supports. | Our team is aware of many different resources available from the district and the community and we are aware of who to contact to access them. We often access these supports for our students. | Our team has a clear procedure for recommending district or community resources during a school-based team meeting. We recommend these supports often and also incorporate district and community personnel in our school-based team meetings when it is appropriate. |
| **Review Process** | We do not review our school-based team processes and function. | We sometimes discuss our school-based team processes and function on a non-regular basis. | We review our school-based team processes and function on a regular basis. | We review our school-based team processes and function on a regular basis. We provide information about our school-based team, it's processes and its function to all staff members on an annual basis. |

# Definitions

**Care Team** – A team composed of representatives from ministries, community agencies and community resources who are already providing support and services to a youth and their family. Care teams and care team meetings are co-ordinated by the Ministry of Children and Family Development. School personnel may be invited to care team meetings on occasion, however, school personnel do not initiate care team meetings.

**Case Manager** – A staff member who will co-ordinate an educational plan for a student. This staff member is not necessarily the person responsible for providing the supports for the student, however they will become the "go-to" person who will oversee the additional support services provided.

**Clearinghouse Meeting** – A term previously used to describe a school-based team referral meeting. This term is no longer in use in our district. Please see the definition of school-based team "referral" meeting.

**Core School-Based Team –** A term previously used to describe the members who would attend a school-based team referral meeting. This term is no longer in use in our district.

**District Resource Team (DRT) –** A district problem solving team comprised of a school-based student services staff representative from each school, Student Services department staff, Aboriginal Education department staff, and Alternative Education department staff. This team meets on a regular basis and provides extended problem solving and intervention supports for school-based teams when school supports have been exhausted. The District Resource Team provides the primary means for transitioning students who may require supports away from their home school.

**Expanded School-Based Team** – A term previously used to describe a school-based team. This term is no longer in use in our district. Please see the definition of school-based team and school-based team meeting.

**LA/School Student Services File** – An LA/School Student Services File is considered a part of a student's Student Record File. Both of these files will follow a student if they transition within the BC K-12 public school system and until they have withdrawn or graduated.

**Level A Assessment** – Level A assessments may be administered by classroom teachers. No specialized training is required to administer or score level A assessments. Examples of level A assessments include Functional Behaviour Checklist, the Foundational Skills Assessment (FSA), or curriculum-based assessments.

**Level B Assessment** – Level B assessments may only be administered and scored by individuals who have a master's degree in psychology, education, occupational therapy, social work, or counselling, and formal training in the ethical administration, scoring, and interpretation of clinical assessments or by individuals who have formal, supervised mental health, speech/language, occupational therapy, social work, counselling, or educational training specific to assessing children, and formal training in the ethical administration, scoring, and interpretation of clinical assessments.
These assessments are generally administered by school-based student services personnel (resource teachers, learning assistance teachers, counsellors, etc.). Examples of level B assessments include the WIAT-3, PPVT-4, TOWL-4, KeyMath-3, etc.

**Level C Assessment** – Level C assessments may only be administered and scored by individuals who have a doctorate degree in psychology, education, or closely related field with formal training in the ethical administration, scoring, and interpretation of clinical assessments, or district-level Educational Psychologists. An example of a level C assessment is a Psychoeducational Assessment (Psych- Ed).

**Response to Intervention (RTI)** – An educational approach to student support which utilizes a multitiered model of service delivery. Each tier consists of services of increased intensity designed to support students who have increased needs. Most often, RTI is viewed as a three-tiered model of student support.

**School-Based Team (SBT) –** An on-going team of school-based personnel which has a formal role to play as a problem solving unit in assisting classroom teachers to develop and implement instructional and/or management strategies and to co-ordinate support resources for students with special needs within the school.

**School-Based Team Meeting** – A meeting in which school-based team members gather to discuss, problem solve, and suggest strategies for one specific student. These meetings may include additional team members who support the student within or outside of the school. During a school-based team meeting, team members will take an in-depth look at the student's strengths and struggles, and may suggest school-based, district-based, or community-based interventions. School-based team meetings may be considered a Tier 2 RTI support.

**School-Based Team "Referral" Meeting** – A larger school-based team meeting in which multiple referrals will be discussed during a single meeting. The discussion at a "referral" meeting will focus on ensuring that a case manager is in place for each referred student and may result in suggested interim intervention strategies for the student, teacher or school-based staff. Discussing referrals at a school-based team "referral" meeting is an appropriate way to regularly monitor a student who is struggling more closely. These school-based team "referral" meetings may be considered a Tier 1 RTI support.

**Tier 1** – The bottom tier of a three-tiered RTI model. Tier 1 consists of high-quality, differentiated instruction and behavioural supports that are provided for all students. The supports provided in Tier 1 may include research supported best teaching practices, ongoing assessment and progress monitoring, differentiated instruction based on the results of ongoing assessments, and social and emotional learning with positive behaviour support. Level A assessments would typically fall within Tier 1.

**Tier 2** – The middle tier of a three-tiered RTI model. Tier 2 supports are provided for students who are progressing at a rate that is lower than their same age peers when Tier 1 supports have been provided. The supports provided in Tier 2 may include small group instruction, mentoring or peer tutoring, learning assistance support, level B assessments to identify where a student is requiring additional support, referral to the school-based team (SBT) for collaborative problem solving, more frequent progress monitoring to ensure interventions are delivering the intended outcome, parent or guardian involvement in educational planning, individual behaviour support planning, and individualized classroom interventions.

**Tier 3** – The top tier of a three-tiered RTI model. Tier 3 supports are provided for students who are continuing to struggle significantly, even after Tier 1 and Tier 2 supports have been provided. Most students who require Tier 3 supports will qualify for a Ministry of Education special needs category. The supports provided in Tier 3 may include planning and interventions provided in consultation with district Student Services staff, Level C assessments administered by a psychologist, referral to the District Resource Team (DRT) for collaborative problem solving, continued parent or guardian involvement in educational planning, continued frequent progress monitoring to ensure interventions are delivering the intended outcome, and recommendation to a school-based, district, or community specialized support program.

# Documentation Examples
*(examples are also available on SharePoint)*

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**Unsworth
Elementary School**

Chilliwack
School District

Unsworth Elementary School-Based Team
Referral Form

Student: _____ Male: _____ Female: _____
Grade: _____ Division: _____
Referred By: _____ Referral Date: _____

Please complete this first
Pre-referral checklist:
____ Have checked the student file and LA file.
____ Have interviewed or spoken to the parents.
____ Have adapted materials, approach and / or expectations
____ Have consulted with previous teacher, other teachers and / or
     SBT support staff for observation and help.
____ Have made an informal assessment.
____ Have turned in evidence that there is a need for further
     assessment, resourced or services to the LA teacher.

Purpose of this referral:
____ Testing
____ L.A.
____ Consultation with counselor
____ SBT Meeting
____ Problem solving with SBT
____ Aboriginal Support
____ Speech Lang. Testing

What are your main concerns about this student?

| Academic Achievement | Social Emotional |
|---|---|
| Reading:<br>___ Fluency<br>___ Comprehension<br>___ Word Attack | ___ General attitude<br>___ Behaviour in class<br>___ Behaviour on playground<br>___ Lacks motivation and interest |
| Writing:<br>___ Spelling<br>___ Vocabulary<br>___ Reversals | Physical Development<br>___ Vision<br>___ Hearing<br>___ Fine Motor<br>___ Gross Motor |
| Language:<br>___ Vocabulary<br>___ Expressive<br>___ Receptive<br>___ Phonological Awareness | Work Habits:<br>___ Follows Directions (oral or written)<br>___ Focus<br>___ Organizational Skills<br>___ Written Output |
| Numeracy:<br>___ Computation<br>___ Concepts<br>___ Word Problems | General Performance:<br>___ Overall Weakness<br>___ Inconsistent Performance<br>___ School Attendance Patterns |

Comments:
_____
_____
_____

5685 Unsworth Rd. Chilliwack, BC, Canada V2R 4P5 | Phone 604.858.4510 | Fax 604.858.9637 | http://unsworth.sd33.bc.ca

**A.D. RUNDLE MIDDLE SCHOOL**

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**The following process must be undertaken prior to any SBT referral**
Submit completed forms to SBT chairperson: E. Barisoff-Harris 1

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**Student**:_____ **Grade**:_____

**Referred by**:_____**Date**:_____

Briefly outline concern(s):

☐Attendance     ☐Behaviour     ☐Late     ☐ Personal Issues: social/emotional

☐Lack of Effort     ☐Academic performance     ☐Missing Assignments

☐Other

_____

_____

_____

**Teacher Intervention Checklist**

Before submitting this form, have you:

                                                Date/Mode

Reviewed file/notes?                ☐No  ☐Yes_____

Consulted student?                   ☐No  ☐Yes_____

Consulted parents?                   ☐No  ☐Yes _____

Consulted other/previous teachers?     ☐No  ☐Yes _____
Briefly summarize your findings in relation to the above consultations: _____

_____

_____

_____

_____

Strengths:_____

_____

Areas of concern: _____

_____

Briefly outline any in-class interventions (academic/behavioural) you have used:

☐Clearly stated classroom expectations          ☐Preferred seating

☐Adapted assignments     ☐Altered/extended due dates

☐Varied assessment of student performance          ☐Written contract

☐Peer tutor/mentor     ☐Tangible/intangible reinforcement     ☐ Other:

_____

# School-Based Teams: Best Practices

Chilliwack School District

**Tyson Elementary**
**SBT Referral Process**

*BEFORE* referring this student, ensure you have:
1. Checked files (Student Record File, LA/School Student Services File) ☐
2. Consulted with previous teacher / Learning Assistance ☐
3. Consulted with parent about concern (s) ☐
4. *Completed* form (and gave to SBT Coordinator) ☐

**Referral:**

**Student Name:** _____

**Referred by:** _____  **Referral Date:** _____

**Teacher:** _____  **Grade:** _____

**Parent/Guardian(s):** _____  **Ministry Category:** _____

**DOB:** _____  **IEP in place:** ☐ Yes ☐ No

## What are your main concerns about this student?

*General Performance*
☐ General Attitude
☐ Inconsistent Performance
☐ School Attendance
☐ Engagement

*Language Development*
☐ Word Attack / Decoding
☐ Reversals
☐ Fluency
☐ Comprehension
☐ Spelling
☐ Written Output

*Speech & Language*
☐ Articulation
☐ Vocabulary
☐ Expressive Language
☐ Receptive Language
☐ Phonological Awareness

*Numeracy Development*
☐ Number Concepts
☐ Number Computation

*Social Emotional*
☐ Personal Family
☐ Emotional Support/Expression
☐ Social Skills
☐ Self-Regulation

*Behaviour*
☐ In-class Behaviour
☐ Unstructured Time Behaviour
☐ Anger Management
☐ Non-compliance

*Physical Development*
☐ Vision Checked?
☐ Hearing Checked?
☐ Fine Motor
☐ Gross Motor

**Work Habits**
☐ Following Directions
☐ Organization
☐ Neatness

**Notes/Outcomes/Background**
(for Teacher use)
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____

**Strategies Tried**
☐ Adapted/Modified Curriculum Expectations
☐ Adapted Teaching Style
☐ Formed Personal Relationship with Student
☐ Planned Scheduled/Student Choice Breaks
☐ Teach Self-Regulation Strategies
☐ Other: _____

☐ Provided Alternate Learning Environment
☐ Used Signals to Encourage Child
☐ Review of Classroom/School Expectations
☐ Teach Organizational Strategies
☐ Provided Zones Chart and/or Sensory Tools

**I would like to:**
☐ *REFER FOR A SCHOOL-BASED TEAM MEETING*       ☐ *REFER TO SLP*
☐ *REFER FOR LA ASSESSMENT* (e.g. WIAT)       ☐ *REFER TO OT/PT*
☐ *REFER FOR LA SUPPORT*: ☐ Reading   ☐ Writing   ☐ Math   ☐ *CONSULT WITH COUNSELLOR*

**For all of the above, see appropriate section (s) <over> to continue**

**Referral for School Based Team**

Classroom Assessment Data: EPAS (at-risk area): _____ PM Benchmark: _____

What is your reason for wanting meeting? _____
(e.g. Reading, Writing, Numeracy, Executive Function, Behaviour, Mental Health, Social Emotional, Other)

What outcome (if any) are you hoping for? _____

**If arranged, teachers are responsible for inviting parents to SBT Meeting**
(Please send a reminder one week before by Planner, phone, text, or email)

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**Referral for Learning Assistance Assessment**

Classroom Assessment Data: EPAS (at-risk area): _____ PM Benchmark: _____
(e.g. SNAP, Primary Screens, RAD)

What is your main area of concern? _____
(e.g. Reading, Writing, Numeracy, Executive Function)

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**Referral for Learning Assistance Support**

Classroom Assessment Data: EPAS (at-risk area): _____ PM Benchmark: _____

What type of support are you requesting? _____
(e.g. Reading, Writing, Numeracy, Executive Function)

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**Referral for Speech Language Pathologist**

What is your specific area of concern? _____

(e.g. articulation, expressive language, receptive language, phonological awareness)

---

**Referral for Occupational or Physical Therapy**

What is your specific area of concern? _____
(e.g. Fine Motor, Gross motor, Sensory)

---

**Referral for Counsellor Consult**

What is your specific area of concern? _____
(e.g. Social Emotional, Behaviour, Mental Health Effects)

---

***School-Based Team Only:***

☐ Referral Processed (LA Testing, OT, SLP)

☐ Learning Assistance Support: _____

☐ Referral to Outside Agency: _____

☐ Referral to Counsellor: ☐ Check-in ☐ Group ☐ Individual

☐ SBT Meeting Scheduled (date): _____

**Recommendations for Further Support**
(if any; for School-Based Team use only)

_____

_____

_____

_____

_____

_____

**Robertson
Elementary School**

# Referral for SBT or Tier 2/3

Name: _____     Referral Date: _____

Teacher Name: _____     Grade: _____

1) **Pre-Referral Checklist/Background**

    Reviewed Student File/Green File/LA File     Date: _____

    Contact prior teacher     Date: _____

    Contacted parent regarding concerns     Date: _____

    Consulted staff     Date: _____

2) **Areas of Concern**

| Social/Emotional | Work Habits | Language |
|---|---|---|
| Social skills | Attendance | Articulation |
| Non-compliance | Task Initiation | Expressive |
| Attention | Task Completion | Receptive |
| Impulsivity | Engagement | Other |
| Aggression | Other | |
| Other | | |
| **Math** | **Writing** | **Reading** |
| Concepts | Conventions | Phonemic Awareness |
| Problem Solving | Meaning (ideas/details) | Vocabulary |
| Computational | Style | Visual Cueing System |
| Fluency | (clarity/variety/language) | Meaning Cueing System |
| Other | Form/Structure | Structural Cueing System |
| | Other | Comprehension |
| | | Fluency |
| | | Other |

Baseline data and information gathered (i.e. RAD, PM Benchmarks, SWW, background information, parent contact info,). Attach copy.

3) Strengths: _____

4) Learning Goal for Student

_____

_____

_____

**Robertson Elementary School**

5) Interventions/strategies tried and results.  What worked?  What didn't?

_____
_____
_____ -
_____

6) Interventions/strategies suggested at collab session or from SBT.

_____
_____
_____

7) Progress with Interventions (from SBT or Collab Session)

Week 1 _____

Week 2 _____

Week 3 _____

Week 4 _____

Week 5 _____

Week 6 _____

8) Post 6-Week evaluation of goal/intervention (what was the impact of the interventions used?)

_____
_____
_____
_____

# Secondary School
# SCHOOL BASED TEAM "REFERRAL" MEETING CHECKLIST

Student Name:_____        Grade: _____
Min. of Ed. Category:_____
Teacher Name: _____        Referral Date: _____

This student is being referred to the SBT because:

_____
_____
_____
_____

**Please check the appropriate boxes below and add notes to assist the SBT.**

☐        Initial student meeting with counsellor/case manager/administrator


☐        Counsellor/case manager/administrator discusses concerns with classroom teacher(s)


☐        Parents contacted re (LA referral) or academic concerns/plan (tutoring, accessing classroom teacher during out of class times)


☐        File Review/alternate screening form completed (attached)


☐        Administrator referral (if determined an appropriate first step prior to SBT referral)
         - attendance
         - behavior concerns