Initial Meeting—Facilitator's Guide

Note: The following facilitator's guide provides a structure and process that teams may use to analyze data and design intensive intervention plans for students. Teams should modify the content of the script and agenda times, as needed.

Before the meeting: Before holding an initial meeting to design an intensive intervention plan for a student, the facilitator should ensure that:

- The teacher has completed the premeeting process and has compiled sufficient documentation of the following:
  - Evidence that a secondary intervention was delivered with fidelity
  - Data for analysis and planning
- Documentation has been shared to all team members and is available for reference during the meeting.

Step	Who	Time
1. Introduction and purpose	Facilitator	2 min.

The facilitator opens the meeting by stating the purpose of the meeting, introducing team members and noting their roles for the meeting, and reviewing the agenda for the meeting.

Notes to facilitator:

- Welcome the team and the referring teacher.
- Explain that the purpose of the meeting is to review a student referral for intensive intervention, review and analyze student data, select evidence-based strategies to intensify the intervention, and create a plan.
- Review team roles and agenda for the meeting:
  - **Facilitator**: Explains the purpose of the meeting and keeps the participants on task.
  - **Teacher**: Completes the premeeting process, describes the student, and shares student data during the meeting.
  - **Note-Taker**: Takes formal notes for documentation using existing forms or a template as needed.
  - **Scribe**: Takes informal notes and tracks brainstorming ideas in a visible space.
  - **Timekeeper**: Times each section of the meeting and helps the team adhere to the allotted time.

<table>
<tr><th>Step</th><th>Who</th><th>Time</th></tr>
<tr><td>2. Describe the student and share data</td><td>Teacher</td><td>5 min.</td></tr>
<tr><td colspan="3">The referring teacher briefly describes the student, notes the primary area of concern, describes intervention(s) that have been attempted, and reviews student data, highlighting data that illustrate the area of concern.

Notes to facilitator:
• If needed, help the referring teacher compile data and information to be shared with the group in advance of the meeting.
• If needed, prompt the teacher to:
    o Identify the student’s strengths and the primary area of concern.
    o Summarize the intervention(s) attempted.
    o Review student data.
• If needed, encourage teachers to keep their review as objective as possible and refrain from “admiring the problem.”
• Recommend to teachers to spend no more than five minutes describing the student and sharing data (this will encourage them to be succinct).</td></tr>
<tr><td>3. Ask clarifying questions to create a hypothesis</td><td>Team</td><td>5 min.</td></tr>
<tr><td colspan="3">The team asks clarifying questions in order to analyze the data and develop a hypothesis for why the student is responding insufficiently (e.g., skill deficit, function of behavior).

Notes to facilitator:
• Prompt the team to consider the following:
    o Secondary intervention
    o Student needs and background performance information
    o Contributing behavioral factors
    o Contributing academic factors
    o Other contributing factors that may impact sufficient progress
• Refer to the question bank handout “Ask Clarifying Questions to Create a Hypothesis to Guide Intervention Changes” as necessary.
• Encourage the team to come to a consensus about why the student is responding insufficiently, considering the following:
    o Primary skill deficit
    o Function of behavior
• If needed, redirect the team to focus on keeping the conversation solution oriented.</td></tr>
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Step	Who	Time
4. Review evidence-based strategies for intensification	Team	8–10 min

Based on the hypothesized skill deficit or function of behavior, review evidence-based strategies for addressing the specific deficit or function of behavior. The scribe should record all strategies for the group to see and refer to during the discussion.

Notes to facilitator:

- Make sure the scribe records all possible adaptations and strategies that are discussed.
- Whenever possible, select and prioritize strategies that are evidence based. If needed, make note of strategies for which the team should examine the evidence base.
- Ensure that all strategies align to the hypothesized deficit or function of behavior.
- For academic interventions:
    - Consider making both quantitative adaptations (e.g., time, group size) and qualitative adaptations (e.g., content, instructional methods).
- For behavioral interventions:
    - Consider whether or not the function of behavior is addressed by the intervention and if the intervention can be delivered with greater intensity or frequency before considering other adaptations.
- If needed, refer teams to the handout "Intensification Strategy Checklist," which includes the principles of intensive intervention.

Step	Who	Time
5. Prioritize and plan	Team	5–7 min.

Prioritize which adaptation or strategy may be most effective and should be attempted first, using the chart in the "Initial Meeting Note-Taking Template" if needed, and then create a clear plan for delivering the intensive intervention.

Notes to facilitator:

- Ensure that the teacher's input is heard when prioritizing and planning for the intervention.
- Provide guidance to prompt the team to consider all possible adaptations and strategies.
- Consider using the following system to categorize while the scribe records:

    1 = Will try right away

    2 = Will consider trying in the future

    3 = Have already attempted

    4 = Need to research further

Step	Who	Time

• Ensure that a plan is created that includes the following:
  ○ The person responsible for each step/aspect of plan.
  ○ A timeline for each part of plan.
  ○ A clearly defined goal and method for progress monitoring.
  ○ Any other next steps needed.		

6. Wrap-up and next steps	Facilitator	3 min.
Set a date and time for a follow-up meeting to monitor the student's progress in the intensive intervention(s). Discuss how and where the student's plan will be documented and how it will be shared with all necessary teachers/team members. Discuss how the student's plan will be communicated to parents and ensure that all team members are clear on their next steps for implementing the student's plan. **Notes to facilitator:** • Ensure that a date and time are set for the follow-up meeting. ○ Generally, teams should plan to check in two to six weeks after the initial meeting. • Ensure that a plan is in place for how and where the student's plan will be documented and disseminated to teachers and team members. • Ensure that there is a plan in place to communicate the changes or new plan with the parent(s). • Ensure that all team members are clear on their next steps for implementing the plan.		