Tier 3: Developing an RTI Problem-Solving Team for Intensive Intervention Planning

Jim Wright
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RTI Classroom Teacher Toolkit

Tier 3: Developing an RTI Problem-Solving Team for Intensive Intervention Planning

Jim Wright, Presenter

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The Kenmore-Town of Tonawanda Union Free School District

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Workshop Materials: http://www.interventioncentral.org/ken_ton_schools
Tier 3: Developing an RTI Problem-Solving Team for Intensive Intervention Planning

Participants: ____________________________ Date: ___________________

School: ____________________________ Date: _____________

GOAL 1: The Tier 3 RTI Problem-Solving Team has set clear guidelines for what intervention efforts should occur before an RTI Team Meeting is scheduled and when a student is ready to be referred to the Team.

List the 'next steps' that you plan to follow to accomplish this goal:

1. ____________________________________________________________
2. ____________________________________________________________
3. ____________________________________________________________
4. ____________________________________________________________
5. ____________________________________________________________

Who in your school or district will you need to enlist to help you with this goal?:

1. ____________________________________________________________
2. ____________________________________________________________

What resources will you need beyond those supplied in this training to accomplish the goal?

1. ____________________________________________________________
2. ____________________________________________________________

Comments: ______________________________________________________

GOAL 2: The membership of the RTI Team is sufficiently diverse to address a range of student academic and behavioral problems.

List the 'next steps' that you plan to follow to accomplish this goal:

1. ____________________________________________________________
2. ____________________________________________________________
3. ____________________________________________________________
4. ____________________________________________________________
5. ____________________________________________________________

Who in your school or district will you need to enlist to help you with this goal?:

1. ____________________________________________________________
2. ____________________________________________________________

What resources will you need beyond those supplied in this training to accomplish the goal?

1. ____________________________________________________________
2. ____________________________________________________________

Comments: ______________________________________________________
RTI: Tier 3: What Is the Expectation After Today’s Training?

- This workshop will present a protocol for setting up and running Tier 3 RTI Teams.
- While your school is encouraged to pilot changes to your RTI Team process based on this training, you are not required to do so.
- During the current school year, Ken-Ton Schools is planning to convene an RTI Leadership Team to establish expectations for district-wide RTI procedures, including the structure and operation of Tier 3 RTI Teams.
- Direction about any district changes to Tier 3 RTI Teams will come from Ken-Ton Schools.
Workshop Agenda: Tier 3: RTI Teams

1. Tier 3 Problem-Solving Team: What It Is. What is the purpose of the RTI Team and where does it fit within the RTI Tiers?

2. Tier 3 RTI Team: Membership & Roles. Who serves on the RTI Team and what are the Team roles?

3. Tier 3 RTI Team: Meeting Agenda. How is the RTI Team meeting structured?

4. Tier 3 RTI Team: Practice. What is the experience of participating in an RTI Team meeting?

5. Tier 3 RTI Team: Choose the Path. What are steps that your school can take during this school year to advance RTI Teams?
Tier 3 RTI Team Referral: Activity

In your groups:

- Think of a student with significant academic delays that one of you has worked with.
- Complete the table copy of the ‘Student At-Risk Referral Form’ for the student as if you were referring him or her to the RTI Team.
Academic Failure: Student Risk Factors. What issue(s) contributing to student academic delays present the greatest challenge(s) to your school or district?
The Struggling Student: Possible Risk Factors

- Schools have limited resources to implement RTI.

They should, therefore, consider and prioritize those risk factors that appear to impact students most. This information can help each school to better focus its RTI efforts.
The Struggling Student: Possible Risk Factors

1. **Lack of Basic Skills.** Lacks the basic academic skills (e.g., reading fluency) necessary to keep up with demanding MS/HS work.

2. **Limited Use of Cognitive Strategies.** Struggles to correctly identify and use appropriate higher-level thinking (‘cognitive’) strategies required for success in content-area coursework.
The Struggling Student: Possible Risk Factors

3. **Deficient ‘Academic Survival’ Skills.** Has the necessary academic potential but shows significant gaps in academic survival skills (e.g., homework routine, time management, organization, etc.).

4. **Learned Helplessness.** Has zero confidence in ability to attain academic success by increasing effort and adopting improved practices.
The Struggling Student: Possible Risk Factors

5. **Poor Motivation.** Has the necessary academic potential but fails to see an adequate ‘pay-off’ for doing the assigned work.

6. **Social/Emotional/Behavioral Difficulties.**
Experiences academic failure because of social/emotional factors other than motivation (e.g., anxiety, ADHD, Oppositional Defiant Disorder).
The Struggling Student: Possible Risk Factors

7. **Limited Personal Connections.** Lacks sustaining connections with significant adults (e.g., teachers) in the school setting.

8. **Home Pressures.** Struggles because of preoccupation with ‘home’ situation: e.g., transportation, family illness, childcare, housekeeping.
Activity: Conducting Your Own Risk Needs Assessment

In your groups:

- Review the 8 risk factors for struggling students presented here.

- Discuss each item and its effect on your classroom or school. Record the main points from discussion.

- Based on your discussion, CIRCLE the TOP 1-2 factors from this list that you feel MOST impact your classroom or school.

### The Struggling Student: Possible Risk Factors:

1. Lack of Basic Skills
2. Limited Use of Cognitive Strategies
3. Deficient Academic Survival Skills: e.g., homework, organization, etc.
4. Learned Helplessness
5. Poor Motivation
7. Limited Personal Connections
8. Home Pressures
We can not solve our problems with the same level of thinking that created them.

-Albert Einstein
**Tier 3 Problem-Solving Team: What It Is.** What is the purpose of the RTI Team and where does it fit within the RTI Tiers?
RTI: Tier 3: Intensive Intervention

- Students with substantial academic (and/or behavioral) deficits who do not respond to lesser interventions may receive a Tier 3 intervention. In a typical school, 1-5% of students may need a Tier 3 intervention in a given year.

The group that designs and implements the Tier 3 intervention plan is the RTI Problem-Solving Team.

The RTI Team develops *customized* intervention plans. The Team identifies the most important blockers to student success and develops a unique *intervention plan* to address those concerns.
Tier 3: Intensive Interventions: Problem-Solving Team

• At Tier 3, the RTI Problem-Solving Team (‘RTI Team’) meets on students with intensive academic or behavioral needs to develop customized intervention plans.

• The RTI Team is prepared to develop Tier 3 plans for up to 5 percent of students in a school.

• RTI Team meetings follow a version of the investigative ‘problem-solving’ consultation model (e.g., Bergan, 1995)—to include:
  – Problem Identification
  – Problem Analysis
  – Plan Development and Implementation
  – Problem Evaluation

Tier 3 Targets: Intervention, Curriculum, and Environment

“Rather than considering a [student] problem to be the result of inalterable student characteristics, [RTI Teams] are compelled to focus on change that can be made to the intervention, curriculum or environment that would result in positive student outcome.

The hypothesis and intervention should focus on those variables that are alterable within the school setting. These alterable variables include learning goals and objectives (what is to be learned), materials, time, student-to-teacher ratio, activities, and motivational strategies.” p. 95

How Is the RTI Team Like a MASH Unit?

- The RTI Team must deal with complex situations with limited resources and tight timelines, often being forced to select from among numerous ‘intervention targets’ (e.g., attendance, motivation, basic skill deficits, higher-level deficits in cognitive strategies) when working with struggling students.

- The ‘problem-solving’ approach is flexible, allowing the RTI Team quickly to sift through a complex student case to identify and address the most important ‘blockers’ to academic success.

- Timelines for success are often short-term (e.g., to get the student to pass a course or curb behaviors so she can stay in the classroom), measured in weeks or months.
RTI Assumption: Struggling Students Are ‘Typical’
Until Proven Otherwise...

RTI logic assumes that:

- A student who begins to struggle in general education is *typical*,
  and that

- It is general education’s responsibility to find the instructional
  strategies that will unlock the student’s learning potential

Only when the student shows through well-documented interventions that he or she has ‘failed to respond to intervention’ does RTI begin to investigate the possibility that the student may have a learning disability or other special education condition.
Response to Intervention

Avg Classroom Academic Performance Level

Discrepancy 1: Skill Gap (Current Performance Level)

Target Student

Discrepancy 2: Gap in Rate of Learning (‘Slope of Improvement’)

‘Dual-Discrepancy’: RTI Model of Learning Disability (Fuchs 2003)
RTI: Sample Decision Rules: Identifying the Academic ‘Non-Responding’ Student

The student:

• received interventions in current classroom to address concerns.
• has completed 3 or more ‘intervention trials’ at Tiers 2 & 3 (with at least one at Tier 3)—with each trial lasting at least 6-8 weeks.
• continues to show a large academic ‘performance deficit’.
• has failed to close the academic gap with peers (as measured by school-wide screening tools).

The RTI ‘evidence trail’ shows that the student’s interventions were:

• research-based.
• appropriately matched to the student concern.
• carried out with integrity.
Tier 3 RTI Team Referral Guidelines:

Activity

RTI Teams typically have minimum expectations of teacher referrals.

1. Write a description of your group’s ‘non-negotiable’ expectations of the documentation required to refer a student to the RTI Team.

2. Brainstorm a process for reviewing RTI Team referrals and –if necessary—’walking them back’ to the referring educator for more interventions.
Tier 3 RTI Team: Membership & Roles. Who serves on the RTI Team and what are the Team roles?
RTI Team: A Multi-Disciplinary Group

The RTI Problem-Solving Team functions best when it has a mix of disciplines serving on it. Possible members include general and special-education teachers, support staff (e.g., counselors, school psychologists), related-service providers, and administrators.

While a school may want to recruit a large pool of RTI Team talent, a smaller number (e.g., 4-6 Team members) would typically be invited to a particular student meeting.
RTI Problem-Solving

Team Roles p. 2

- Facilitator
- Recorder
- Time Keeper
- Case Manager
- Coordinator
<table>
<thead>
<tr>
<th>RTI Team Role</th>
<th>Responsibilities</th>
<th>Tips for RTI Teams</th>
</tr>
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</table>
| Facilitator   | □ Opens the meeting by welcoming the referring teacher(s), parents, and student; describing what is to be accomplished at the meeting, and how long the meeting will last.  
□ Guides the Team through the stages of the problem-solving process.  
□ Checks for agreement between Team members at important discussion points during the meeting.  
□ Maintains control of the meeting (e.g., requesting that participants not engage in side-bar conversations, reminding the team to focus its problem-solving discussion on those factors over which it has control—e.g., classroom instruction). | • Write a short introductory ‘script’ to ensure that important points are always reviewed at the start of the meeting.  
• Create a poster listing the steps of the meeting problem-solving process as a visual guide to keep Team members on task and to transition from one step to another. |
### RTI Team Role Responsibilities Tips for RTI Teams

<table>
<thead>
<tr>
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<tr>
<td>Recorder</td>
<td>Creates a record of the intervention meeting, including a detailed plan for intervention and progress-monitoring. Asks the Team for clarification as needed about key discussion points, including phrasing of teacher ‘problem-identification’ statements and intervention descriptions.</td>
<td>• Sit next to the facilitator for ease of communication during the meeting. • When the Team is engaged in exploratory discussion, use ‘scratch paper’ to capture the main points. When the Team reaches agreement, recopy only the essential information onto the formal meeting forms.</td>
</tr>
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<td>---------------</td>
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</tbody>
</table>
| Time-Keeper   | Monitors the time allocated to each stage of the meeting and informs members when that time has expired. | • Give the Team a ‘two-minute warning’ whenever time is running low during a stage of the meeting.  
• If time runs out during a meeting stage, announce the fact clearly. However, let the facilitator be responsible for transitioning the team to the next meeting stage. |
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| Case Manager        | ☐ Meets with the referring teacher(s) briefly prior to the initial RTI Team meeting to review the teacher referral form, clarify teacher concerns, decide what additional data should be collected on the student.  
☐ Touches base briefly with the referring teacher(s) after the RTI Team meeting to check that the intervention plan is running smoothly. | • If you discover, in meeting with a referring teacher prior to the RTI Team meeting, that a concern is vaguely worded, help the teacher to clarify the concern with the question “What does [teacher concern] look like in the classroom?”  
• After the RTI Team meeting, consider sending periodic emails to the referring teacher(s) asking them how the intervention is going and inviting them to inform you if they require assistance. |
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<tr>
<td>Coordinator</td>
<td>Handles the logistics of RTI Team meetings, including scheduling meetings, reserving a meeting location, arranging coverage when necessary to allow teachers to attend meetings, and notifying Team members and referring teachers of scheduled meetings.</td>
<td>• During the time set aside for weekly RTI Team meetings, reserve time for the Tam to review new student referrals and to schedule them in the meeting calendar. • Define those coordinator duties that are clerical in nature (e.g., scheduling meeting rooms, emailing meeting invitations, etc.) and assign them to clerical staff.</td>
</tr>
</tbody>
</table>
Tier 3 RTI Membership: Activity

RTI Problem-Solving Teams are stronger when they are multi-disciplinary.

- Generate a list of people/positions at your school that you believe should serve on your RTI Problem-Solving Team.

- TIP: Consider recruiting a larger number of staff for the Team and rotating them at RTI Team meetings or inviting members only when the student referral concern matches their area(s) of expertise.
RTI Teams: The Role of the Case Manager
The Case Manager-Teacher ‘Pre-Meeting’: Creating a More Efficient RTI Team Process

Prior to an initial RTI Problem-Solving Team meeting, it is recommended that a case manager from the RTI Team schedule a brief (15-20 minute) pre-meeting with the referring teacher. The purpose of this pre-meeting is for the case manager to share with the teacher the purpose of the upcoming full RTI Team meeting, to clarify student referral concerns, and to decide what data should be collected and brought to the RTI Team meeting.

Here is a recommended agenda for the case manager-teacher pre-meeting:

1. Explain the purpose of the upcoming RTI Problem-Solving Team meeting: The case manager explains that the RTI Team meeting goals are to (a) fully understand the nature of the student’s academic and/or behavioral problems, (b) develop an evidence-based intervention plan for the student, and (c) set a goal for student improvement and select means to monitor the student’s response to the intervention plan.

2. Define the student referral concern(s) in clear, specific terms. The case manager reviews with the teacher the most important student referral concern(s), helping the teacher to define those concern(s) in clear, specific, observable terms. The teacher is also prompted to prioritize his or her top 2-3 student concerns. NOTE: Use the guide that appears on the next page for writing academic or behavioral problem identification statements and for dividing global skills into component sub-skills.

3. Decide what data should be brought to the RTI Team meeting. The case manager and teacher decide what student data should be collected and brought to the RTI Team meeting to provide insight into the nature of the student’s presenting concern(s). Use the table below to select data for RTI decision-making.

<table>
<thead>
<tr>
<th>Data Source</th>
<th>Types of Data to Be Collected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Archival data</td>
<td>Select relevant information already in the cumulative folder or student database.</td>
</tr>
<tr>
<td>Student work products</td>
<td>Collect examples of homework, tests, in-class assignments, work projects (with examples from typically performing students collected as well for purposes of comparison).</td>
</tr>
<tr>
<td>Student interview</td>
<td>Conduct a student interview, closed the student to get his or her perspective on the academic and/or behavioral problems.</td>
</tr>
<tr>
<td>Specialized assessment</td>
<td>Decide whether more specialized, individual assessment is required (e.g., direct observations of the student’s rate of on-task behavior, instructional assessment to map out in detail the student’s skills in literacy, mathematics, etc.).</td>
</tr>
</tbody>
</table>

Identifying the Student Concern: Guides for Defining Academic and Behavioral Problems and for Breaking Global Skills into Component Sub-Skills

<table>
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<tr>
<th>Academic Problems: Format for Writing Problem Definition Statement</th>
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<tbody>
<tr>
<td>Conditions/Task Demands</td>
</tr>
<tr>
<td>Example: For science homework...</td>
</tr>
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</table>

<table>
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<th>Behavioral Problems: Format for Writing Problem Definition Statement</th>
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<td>Example: When given a verbal teacher request...</td>
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Discrete Categorization: Divide Global Skill into Essential Sub-Skills

<table>
<thead>
<tr>
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</tr>
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<tbody>
<tr>
<td>Example: (Global Skill) The student will improve classroom organization skills!</td>
</tr>
<tr>
<td>Sub-Skill 1:</td>
</tr>
<tr>
<td>Sub-Skill 2:</td>
</tr>
<tr>
<td>Sub-Skill 3:</td>
</tr>
<tr>
<td>Sub-Skill 4:</td>
</tr>
<tr>
<td>Sub-Skill 5:</td>
</tr>
</tbody>
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Case Manager: Role

• Meets with the referring teacher(s) briefly (15-20 minutes) prior to the initial RTI Team meeting to review the teacher referral form, clarify teacher concerns, decide what additional data should be collected on the student.

• Touches base briefly with the referring teacher(s) after the RTI Team meeting to check that the intervention plan is running smoothly.
Case Manager: Pre-Meeting Steps

Here is a recommended agenda for the case manager-teacher pre-meeting:

1. **Explain the purpose of the upcoming RTI Problem-Solving Team meeting:** The case manager explains that the RTI Team meeting goals are to (a) fully understand the nature of the student’s academic and/or behavioral problems; (b) develop an evidence-based intervention plan for the student; and (c) set a goal for student improvement and select means to monitor the student’s response to the intervention plan.
Case Manager: Pre-Meeting Steps

2. Define the student referral concern(s) in clear, specific terms. The case manager reviews with the teacher the most important student referral concern(s), helping the teacher to define those concern(s) in clear, specific, observable terms. The teacher is also prompted to prioritize his or her top 1-2 student concerns.
Case Manager: Pre-Meeting Steps

3. 

Decide what data should be brought to the RTI Team meeting. The case manager and teacher decide what student data should be collected and brought to the RTI Team meeting to provide insight into the nature of the student’s presenting concern(s).
## Case Manager: Pre-Meeting Steps

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### Identifying the Student Concern: Guides for Defining Academic and Behavioral Problems and for Breaking Global Skills into Component Sub-Skills

#### Academic Problems: Format for Writing Problem Definition Statement

<table>
<thead>
<tr>
<th>Environmental Conditions or Task Demands</th>
<th>Problem Description</th>
<th>Typical/Expected Level of Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example: For science homework...</td>
<td>...Tye turns in assignments an average of 50% of the time...</td>
<td>...while the classroom median rate of homework turned in is 90%.</td>
</tr>
</tbody>
</table>

#### Behavioral Problems: Format for Writing Problem Definition Statement

<table>
<thead>
<tr>
<th>Conditions. The condition(s) under which the problem is likely to occur</th>
<th>Problem Description. A specific description of the problem behavior</th>
<th>Contextual Information. Information about the frequency, intensity, duration, or other dimension(s) of the behavior</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example: When given a verbal teacher request...</td>
<td>...Jay fails to comply with that request within 3 minutes...</td>
<td>...an average of 50% of the time.</td>
</tr>
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</table>

#### Discrete Categorization: Divide Global Skill into Essential Sub-Skills

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</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Example: Sub-Skills for “Classroom Organization Skills”</td>
</tr>
<tr>
<td>Sub-Skill 1:</td>
<td>□ Sub-Skill 1: Arrive to class on time</td>
</tr>
<tr>
<td>Sub-Skill 2:</td>
<td>□ Sub-Skill 2: Bring work materials to class</td>
</tr>
<tr>
<td>Sub-Skill 3:</td>
<td>□ Sub-Skill 3: Follow teacher directions in a timely manner</td>
</tr>
<tr>
<td>Sub-Skill 4:</td>
<td>□ Sub-Skill 4: Know how to seek teacher assistance when needed</td>
</tr>
<tr>
<td>Sub-Skill 5:</td>
<td>□ Sub-Skill 5: Maintain an uncluttered desk with only essential work materials</td>
</tr>
</tbody>
</table>
Case Manager: Tips

• If you discover, when you meet with a referring teacher prior to the RTI Team meeting, that his or her concern is vaguely worded, help the teacher to clarify the concern with the question “What does [teacher concern] look like in the classroom?”

• After the RTI Team meeting, consider sending periodic emails to the referring teacher(s) asking them how the intervention is going and inviting them to inform you if they require assistance.
Team Activity: Defining Case Manager & the RTI Team ‘Pre-Meeting’

At your table, discuss:

• who might serve as case managers at your school, and

• when these ‘pre-meetings’ might take place.
Tier 3 RTI Team: Meeting Agenda. How is the RTI Team meeting structured?
RTI Problem-Solving Team: Facilitator’s Guide p. 6

RTI Problem-Solving Team: Facilitator’s Guide

Facilitators can use this guide to ‘walk’ them through RTI Team meetings and to ensure that the RTI Problem-Solving Team: Initial Meeting Minutes Form fully documents the student’s intervention.

Introduction/Talking Points. As facilitator, an effective way to open the meeting is briefly to review key ‘talking points’ that (1) state the purpose of the meeting, (2) introduce team members and assigned roles, (3) remind participants of time constraints, (4) review the agenda, and (5) present expectations for active participation.

Beginning the meeting with consistent talking points is a good way of reminding participants that the RTI meeting follows a structured format and that time is precious and that all attending have a voice in the discussion.

See the RTI Problem-Solving Team: Initial Meeting: Introductory Talking Points that appears later in this document for a sample script that can be used at the meeting opening.

STEP 1: Select Intervention Target(s).

GOAL: The goal during this meeting segment is to verify that intervention targets (problem description) are described in sufficient detail and that each intervention target has been matched to at least one ‘probable cause’ or ‘function’ that helps to explain why the academic or behavioral problem is happening. See Table 1 below for a listing of common reasons for behavioral and academic problems:

<table>
<thead>
<tr>
<th>TABLE 1: Probable Cause/Function for Concerns: Scaled up to 3 choices</th>
</tr>
</thead>
<tbody>
<tr>
<td>Behavioral</td>
</tr>
<tr>
<td>☐ Lacks necessary skills</td>
</tr>
<tr>
<td>☐ Has the necessary behavioral skills but is not motivated by the instructional task/setting to comply/behave appropriately</td>
</tr>
<tr>
<td>☐ Seeks attention from adults</td>
</tr>
<tr>
<td>☐ Seeks attention from peers</td>
</tr>
<tr>
<td>☐ Reacts to teasing/bullying</td>
</tr>
<tr>
<td>☐ Tries to escape from instructional demands or setting</td>
</tr>
<tr>
<td>☐ Attempts to hide academic deficits through noncompliance or other misbehavior</td>
</tr>
</tbody>
</table>

SAMPLE QUESTIONS: Some questions that you might ask to better describe the intervention target and to link that target to a function or cause are:

- What does this student’s problem behavior look like in the classroom? What are specific examples of it?
- What “pay off” do you believe might explain this student’s behavior?
- Does the student have the skills necessary to do the expected academic work?
RTI Problem-Solving Team: Initial Meeting Minutes Form p. 16
Tier 3: RTI Team: Meeting Format

- **Introductions/Talking Points**
- **Step 1**: Select Intervention Target(s)
- **Step 2**: Inventory Student’s Strengths, Talents, Interests, Incentives
- **Step 3**: Review Background/Baseline Data
- **Step 4**: Set Academic and/or Behavioral Outcome Goals and Methods for Progress-Monitoring.
- **Step 5**: Design an Intervention Plan
- **Step 6**: Share RTI Intervention Plan With Parent(s)
- **Step 7**: Review the Intervention and Progress-Monitoring Plans
Response to Intervention

RTI Problem-Solving Team: Facilitator’s Guide p. 5
Tier 3: RTI Team: Meeting Format

- **Introductions/Talking Points.** As facilitator, an effective way to open the meeting is briefly to review key 'talking points' that (1) state the purpose of the meeting, (2) introduce team members and assigned roles, (3) remind participants of time constraints, (4) review the agenda, and (5) present expectations for active participation.

- Beginning the meeting with consistent talking points is a good means of reminding participants that the RTI meeting follows a structured format, that time is precious, and that all attending have a voice in the discussion.
### Talking Point

Welcome to this initial RTI Problem-Solving Team meeting. We are meeting today to develop a customized intervention plan. This plan will build on the strengths of our student, [Student Name], to help him/her be more successful in school.

I am the facilitator for today’s meeting.

The person taking meeting notes will be ____________.

The case manager for this student is ________________

The time-keeper for the meeting is ________________

[If appropriate, have remaining team members introduce themselves.]

This meeting will last about 30 minutes.

### Rationale

**Statement of Purpose.** The opening segment clearly presents the purpose of the meeting, reminding participants that the single goal is to create an intervention plan to be implemented immediately to promote student success.

**Introduction.** Participants are told which team members are assigned formal roles for the meeting, information that will help them to better understand the interactions and conversations that follow.

**Time Constraints.** Team members are reminded that the RTI Problem-Solving Team has only limited time within which to work—a prompt to remain on-topic and refrain from sidebar conversations.

**Agenda.** Briefly reviewing the meeting agenda informs those who are new to the RTI process of what to expect.

The agenda review also reinforces the point that the RTI Team is expected to conclude the meeting with a viable intervention plan.

### Rules of Engagement

Participants are explicitly encouraged to be active participants in the discussion. This ‘talking point’ is especially important.

Everyone attending this meeting is a part of our RTI Team. So as we develop the intervention plan, you should all feel free to offer your input and ideas.
**TALKING POINT 1**

“Welcome to this initial RTI Problem-Solving Team meeting. We are meeting today to develop a customized intervention plan. This plan will build on the strengths of our student, [Student Name], to help him/her to be more successful in school.”

**RATIONALE**

Statement of Purpose. The opening segment clearly presents the purpose of the meeting, reminding participants that the single goal is to create an intervention plan to be implemented immediately to promote student success.
TALKING POINT 2

“I am the facilitator for today’s meeting.

The person taking meeting notes will be ____________.

The case manager for this student is ________________.

The time-keeper for the meeting is ________________.”

[If appropriate, have remaining team members introduce themselves.]

RATIONALE

Introductions. Participants are told which team members are assigned formal roles for the meeting, information that will help them to better understand the interactions and conversations that follow.
**TALKING POINT 3**

“This meeting will last about 30 minutes.”

**RATIONALE**

*Time Constraints.* Team members are reminded that the RTI Problem-Solving Team has only limited time within which to work—a prompt to remain on-topic and refrain from side-bar conversations.
**TALKING POINT 4**

“Our team has much to do. To work efficiently, we will follow a structured problem-solving agenda. During today’s meeting, we will:

- stay focused on issues that are within our ability to change.
- identify the top 1 or 2 intervention targets that we will work on.
- design a written intervention plan with strategies to help our student to be successful.
- set specific goals for improvement and choose ways to collect student data to track progress.
- schedule a follow-up meeting in 8 weeks to see how the intervention is going.”

**RATIONALE**

**Agenda.** Briefly reviewing the meeting agenda informs those who are new to the RTI process of what to expect.

The agenda review also reinforces the point that the RTI Team is expected to conclude the meeting with a viable intervention plan.
**TALKING POINT 5**

“Everyone attending this meeting is a part of our RTI Team. So as we develop the intervention plan, you should all feel free to offer your ideas and to ask questions. Are there any questions at this time? If not, let's begin!”

**RATIONALE**

**Rules of Engagement.** Participants are explicitly encouraged to be active participants in the discussion. This 'talking point' is especially important for participants who are new to the RTI Team process or who tend to be passive observers.
Activity: Customize Your RTI Team’s Introductory ‘Talking Points’

- Look over the sample RTI Team talking points (p. 11).
- Edit these talking points to better fit your school and staff (by adding points, amending the wording of existing points, etc.).
- Be prepared to share your work with the larger group.
## RTI Problem-Solving Team: Initial Meeting Minutes Form p. 16

**STEP 1: Select Intervention Targets**

<table>
<thead>
<tr>
<th>Intervention Target</th>
<th>Probable Cause/Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
</tbody>
</table>

**STEP 2: Inventory Student's Strengths, Talents, Interests, Incentives.** List student strengths, talents, and/or any activities or incentives that the student finds motivating.

<table>
<thead>
<tr>
<th>List: Strengths, Talents, Interests, Incentives</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
</tr>
<tr>
<td>☐</td>
</tr>
<tr>
<td>☐</td>
</tr>
<tr>
<td>☐</td>
</tr>
</tbody>
</table>

**STEP 3: Review Background/Baseline Data.** Summarize relevant background or baseline information that reveals the student's current level of functioning (e.g., attendance, office disciplinary referrals, student grades, Curriculum-Based Measurement data, Daily Behavior Report Card ratings, direct observations of behavior, etc.).

<table>
<thead>
<tr>
<th>Name of Data Source</th>
<th>Data Value(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source 1:</td>
<td></td>
</tr>
<tr>
<td>Source 2:</td>
<td></td>
</tr>
<tr>
<td>Source 3:</td>
<td></td>
</tr>
</tbody>
</table>
Tier 3: RTI Team: Meeting Format

STEP 1: Select Intervention Target(s).

GOAL: The goal during this meeting segment is to verify that 'intervention targets' (problem description) are described in sufficient detail and that each intervention target has been matched to at least one 'probable cause' or 'function' that helps to explain why the academic or behavioral problem is happening.
## Tier 3: RTI Team: Meeting Format

### TABLE 1: Probable Cause/Function for Concerns: Select up to 3 choices

<table>
<thead>
<tr>
<th>Behavioral</th>
<th>Academic</th>
</tr>
</thead>
<tbody>
<tr>
<td>✗ Lacks necessary skills</td>
<td>✗ Is placed in work that is too difficult</td>
</tr>
<tr>
<td>✗ Has the necessary behavioral skills but is not motivated by the</td>
<td>✗ Lacks one or more crucial basic skills in the problem subject area(s)</td>
</tr>
<tr>
<td>instructional task/setting to comply/behave appropriately</td>
<td>✗ Needs drill &amp; practice to strengthen and become more fluent in basic</td>
</tr>
<tr>
<td>✗ Seeks attention from adults</td>
<td>academic skills</td>
</tr>
<tr>
<td>✗ Seeks attention from peers</td>
<td>✗ Has the necessary academic skills, fails to use them in the appropriate</td>
</tr>
<tr>
<td>✗ Reacts to teasing/bullying</td>
<td>settings/situations</td>
</tr>
<tr>
<td>✗ Tries to escape from instructional demands or setting</td>
<td>✗ Needs explicit guidance to connect current skills to new instructional</td>
</tr>
<tr>
<td>✗ Attempts to hide academic deficits through noncompliance or other</td>
<td>demands</td>
</tr>
<tr>
<td>misbehavior</td>
<td>✗ Has the necessary academic skills but is not motivated by the</td>
</tr>
<tr>
<td>✗ §</td>
<td>instructional task/setting to actually do the work</td>
</tr>
</tbody>
</table>

Facilitator’s Guide: p. 6
# Tier 3: RTI Team: Meeting Format

**STEP 1: Select Intervention Target(s).** Describe up to 2 academic and/or behavioral targets to be the focus of this intervention plan. Consult the RTI Team Facilitator's Guide to choose a likely cause or function for each.

<table>
<thead>
<tr>
<th>Intervention Target</th>
<th>Probable Cause/Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The student fails to comply with adult requests in large group.</td>
<td>Peer attention-seeking</td>
</tr>
<tr>
<td>2. The student is chronically tardy in math class.</td>
<td>Escape / avoidance</td>
</tr>
</tbody>
</table>

*Meeting Minutes Form: p.16*
Tier 3: RTI Team: Meeting Format

STEP 1: Select Intervention Target(s).

SAMPLE QUESTIONS:

- What does this student’s problem behavior look like in the classroom? What are specific examples of it?
- What 'pay-off' do you believe might explain this student’s behavior?
- Does the student have the skills necessary to do the expected academic work?
Tier 3: RTI Team: Meeting Format

STEP 1: Select Intervention Target(s).

TIP: This initial step can be time-consuming. So it is strongly recommended that the Case Manager meet with the referring teacher(s) before the initial RTI Team meeting to define each of the student's referral concern(s) in clear and specific terms and select at least one likely reason or function for that concern.
RTI Problem-Solving Team: Initial Meeting Minutes Form p. 16

**STEP 2: Inventory**

Student’s Strengths, Talents, Interests, Incentives

<table>
<thead>
<tr>
<th>Intervention Target</th>
<th>Probable Cause/Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
</tbody>
</table>

**List: Strengths, Talents, Interests, Incentives**

- [ ] __________
- [ ] __________
- [ ] __________
- [ ] __________

**STEP 3: Review Background/Baseline Data.** Summarize/present background or baseline information that reveals the student’s current level of functioning (e.g., attendance, office disciplinary referrals, student grades, Curriculum-Based Measurement data, Daily Behavior Report Card ratings, direct observations of behavior, etc.).

<table>
<thead>
<tr>
<th>Name of Data Source</th>
<th>Date Value(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source 1:</td>
<td></td>
</tr>
<tr>
<td>Source 2:</td>
<td></td>
</tr>
<tr>
<td>Source 3:</td>
<td></td>
</tr>
</tbody>
</table>
Tier 3: RTI Team: Meeting Format

STEP 2: Inventory Student's Strengths, Talents, Interests, Incentives.

GOAL: The RTI Team follows a strength-based approach to intervention-planning, one that incorporates the student's own interests and abilities. The goal for this step, then, is to list the student's strengths, talents, interests, and abilities. During the intervention-planning process, some of these assets may then be incorporated to engage and motivate the student.
Tier 3: RTI Team: Meeting Format

STEP 2: Inventory Student’s Strengths, Talents, Interests, Incentives. List student strengths, talents, and/or any activities or incentives that the student finds motivating.

<table>
<thead>
<tr>
<th>List: Strengths, Talents, Interests, Incentives</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Strong interpersonal skills</td>
</tr>
<tr>
<td>□ Organized</td>
</tr>
<tr>
<td>□ Athletic: participates in sports</td>
</tr>
<tr>
<td>□</td>
</tr>
</tbody>
</table>

Meeting Minutes Form: p.16
Tier 3: RTI Team: Meeting Format

STEP 2: Inventory Student's Strengths, Talents, Interests, Incentives.

SAMPLE QUESTIONS:

• What are some of the student’s strengths, talents, or positive qualities that might be useful in designing interventions?
• What rewards or incentives have you noted in school that this student seems to look forward to?
• What are classroom activities that the student does well or seems to enjoy?
• What are hobbies or topics that interest this student?
Tier 3: RTI Team: Meeting Format

STEP 2: Inventory Student's Strengths, Talents, Interests, Incentives.

TIP: Here are ideas to prompt teachers to be ready to inventory student strengths: (1) The Case Manager can ask about strengths at the pre-meeting with the teacher; (2) the teacher can be reminded to be prepared to speak of student strengths in the letter or email inviting them to the initial RTI Team meeting; (3) your school can include a section on your RTI Team referral form that explicitly directs teachers to list student strengths, talents, abilities, etc.
RTI Problem-Solving Team: Initial Meeting Minutes Form p. 16

**STEP 3: Review Background/Baseline Data**
STEP 3: Review Background/Baseline Data.

GOAL: In this step, the Team reviews any data collected prior to the meeting that will help it to better understand the nature and magnitude of the student's presenting problem(s). Some of the data might come from the school's student-information database (e.g., attendance, number of office disciplinary referrals) while other baseline data may have been collected expressly for the meeting (e.g., student's reading fluency data collected with Curriculum-Based Measures, or behavioral data measured using Daily Behavior Report Cards).
## Tier 3: RTI Team: Meeting Format

### STEP 3: Review Background/Baseline Data
Summarize relevant background or baseline information that reveals the student’s current level of functioning (e.g., attendance, office disciplinary referrals, student grades, Curriculum-Based Measurement data, Daily Behavior Report Card ratings, direct observations of behavior, etc.)

<table>
<thead>
<tr>
<th>Name of Data Source</th>
<th>Data Value(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source 1: Behavior Report Card</td>
<td>In 1 week, the student followed adult requests in math with no non-compliance incidents 1 out of 5 days.</td>
</tr>
<tr>
<td>Source 2: Direct Observation: On-Task</td>
<td>During 3 20-minute obsvs s in large-group instruction, the student was on-task 45%, 70 %, and 40 %.</td>
</tr>
<tr>
<td>Source 3:</td>
<td></td>
</tr>
</tbody>
</table>
Common Methods for Monitoring Student Progress Toward Behavioral and Academic Goals

pp.12-15

**ACADEMIC TARGETS**

<table>
<thead>
<tr>
<th>CBM: Curriculum-Based Measurement</th>
<th>Suggested Behavior Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oral Reading Fluency</td>
<td>Increase ___ Correct Read Words Per Minute to ___</td>
</tr>
<tr>
<td>Maze Passages (Reading Comprehension)</td>
<td>Increase ___ Correct Maze Responses in 3 Minutes to ___</td>
</tr>
<tr>
<td>Math Computation:</td>
<td>Increase ___ Correct Digits Per 2 Minutes to ___</td>
</tr>
<tr>
<td>Specify Computation Problem Type(s)</td>
<td></td>
</tr>
<tr>
<td>Writing: Total Words</td>
<td>Increase ___ Total Words in 3 Minutes to ___</td>
</tr>
<tr>
<td>Writing: Correctly Spelled Words</td>
<td>Increase ___ Words Spelled Correctly in 3 Minutes to ___</td>
</tr>
<tr>
<td>Writing: Correct Writing Sequences</td>
<td>Increase ___ Correct Writing Sequences in 3 Minutes to ___</td>
</tr>
</tbody>
</table>

**Permanent Work Products (Classroom Assignments)**

<table>
<thead>
<tr>
<th>Description of Measure</th>
<th>Suggested Behavior Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount of Work Completed</td>
<td>Increase the Average Percentage of Class Assignments Completed to ___%</td>
</tr>
<tr>
<td>Accuracy of Work Completed</td>
<td>Increase the Average Percentage of Work Done Correctly on Class Assignments to ___%</td>
</tr>
<tr>
<td>Quality of Work Completed</td>
<td>Increase the Average Grade in [Subject Area] to ___</td>
</tr>
</tbody>
</table>

**Homework Assignments**

RTI Team process or who tend to be passive observers.
Tier 3: RTI Team: Meeting Format

STEP 3: Review Background/Baseline Data.

SAMPLE QUESTIONS: Questions that can help to clarify questions about student data include:

• **What information do we have about this student’s current rate of letter identification/reading/math computation/writing fluency?**

• **What data do we have on this student’s current attendance/office referrals/grades?**

• **Since homework is an issue for this student, what is her average percentage of homework turned in?**
Tier 3: RTI Team: Meeting Format

STEP 3: Review Background/Baseline Data.

TIP: The RTI Team should inventory the many types of student information collected by the school, decide what information from that database (e.g., attendance, most recent state test results) should routinely be brought to every RTI Team meeting, and identify who is responsible for bringing each of the data sources to the meeting.
Team Activity: What Routine Data Should Be Routinely Collected Prior to RTI Team Meetings?

At your table:

- list the data sources commonly collected and stored on students in your school.

- Select a ‘core set’ of data from your school that should be routinely brought to RTI Team meetings. Next to each data source, note WHO is supposed to bring it!

- Decide on how to develop a roster of ‘specialized assessment’ personnel (for more targeted data collection such as behavioral observations and academic fluency—CBM—data).
RTI Problem-Solving
Team: Initial Meeting
Minutes Form p. 16

**STEP 4: Set Academic and/or Behavioral Outcome Goals and Methods for Progress-Monitoring.**

<table>
<thead>
<tr>
<th>Academic or Behavioral Measure</th>
<th>Expected Outcome/Exit Goal</th>
<th>Person(s) Collecting Data</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
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<td></td>
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<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Progress-Monitoring: Start Date: ________ End Date: ________ = Total Weeks: ________

B. Intervention Target 2 (from STEP 1):

<table>
<thead>
<tr>
<th>Academic or Behavioral Measure</th>
<th>Expected Outcome/Exit Goal</th>
<th>Person(s) Collecting Data</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Progress-Monitoring: Start Date: ________ End Date: ________ = Total Weeks: ________
STEP 4: Set Academic and/or Behavioral Outcome Goals and Methods for Progress-Monitoring.

GOAL: Interventions require ongoing progress-monitoring. First, the RTI Team decides how many instructional weeks the intervention will be in place. Then, for each identified problem (‘intervention target’), the RTI Team (1) chooses two or more methods of data collection to track student progress, (2) sets outcome/intervention goals for each method, and (3) lists who will be responsible for that progress-monitoring.
### Tier 3: RTI Team: Meeting Format

**STEP 4: Set Academic and/or Behavioral Outcome Goals and Methods for Progress-Monitoring.** For each intervention target, select methods to monitor student progress and set outcome goals. Try to select at least TWO monitoring methods for each concern. NOTE: For data-collection options, refer to the guide *Common Methods for Monitoring Student Progress Toward Behavioral & Academic Goals* in the RTI Team Facilitator’s Guide.

#### A. Intervention Target 1 (from STEP 1):

- The student fails to comply with adult requests in large group.

<table>
<thead>
<tr>
<th>Academic or Behavioral Measure</th>
<th>Expected Outcome/Exit Goal</th>
<th>Person(s) Collecting Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beh Report Card</td>
<td>Yes Compliance Rtg 4 of 5 Days During Last Wk</td>
<td>Smith, Yardley, O’Hannon</td>
</tr>
</tbody>
</table>

---

**Progress-Monitoring: Start Date:** M 8 Feb 2016  **End Date:** F 1 Apr 2016  **Total Weeks:** 8
Tier 3: RTI Team: Meeting Format

STEP 4: Set Academic and/or Behavioral Outcome Goals and Methods for Progress-Monitoring

SAMPLE QUESTIONS: Questions that can help to clarify questions about outcome goals and progress-monitoring include:

• [To determine the length of the intervention] For how many instructional weeks will the intervention run before we meet to review the progress-monitoring data?

• [To set an outcome goal] While it's not realistic to expect to catch this student up to grade level in 8 weeks, what is an 'ambitious but realistic' intermediate goal that will show that the student is making meaningful progress?

• [To determine baseline skills or behavior levels] What is this student's pre-intervention performance on the measure that we are going to use for progress-monitoring?
Tier 3: RTI Team: Meeting Format

STEP 4: Set Academic and/or Behavioral Outcome Goals and Methods for Progress-Monitoring

TIP: For a listing data-collection options and sample wording to describe progress-monitoring goals, refer to the guide *Common Methods for Monitoring Student Progress Toward Behavioral & Academic Goals* that appears later in this document.
**Common Methods for Monitoring Student Progress Toward Behavioral and Academic Goals**

**ACADEMIC TARGETS**

**CBM: Curriculum-Based Measurement**

<table>
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<tr>
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**Permanent Work Products (Classroom Assignments)**

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
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<td>Increase the Average Percentage of Class Assignments Completed to ___%</td>
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<tr>
<td>Accuracy of Work Completed</td>
<td>Increase the Average Percentage of Work Done Correctly on Class Assignments to ___%</td>
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</tr>
</tbody>
</table>

**Homework Assignments**
RTI Problem-Solving
Team: Initial Meeting
Minutes Form p. 17

STEP 5: Design an Intervention Plan.
Tier 3: RTI Team: Meeting Format

STEP 5: Design an Intervention Plan.

• **GOAL:** The intervention plan logically addresses the 1-2 identified intervention targets. The Team can be flexible in documenting interventions. For shorter intervention ideas, the space the Minutes form will be sufficient to record brief strategies.

For interventions that require more documentation, check ‘Y[es]’ in the 'Additional Information?' column, and then attach full documentation for this element to the meeting minutes or include in an accompanying folder.
**Tier 3: RTI Team: Meeting Format**

<table>
<thead>
<tr>
<th>Additional Documentation?</th>
<th>Intervention Strategy</th>
<th>Person(s) Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Y</strong> N</td>
<td>Daily Check In/Check Out for Homework Completion</td>
<td>Mrs. Werbeck</td>
</tr>
<tr>
<td><strong>Y</strong> N</td>
<td>Classroom Plan: Protocol for Managing Non-Compliance</td>
<td>All Tchrs: Core &amp; Specials</td>
</tr>
<tr>
<td><strong>Y</strong> N</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Y</strong> N</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Y</strong> N</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Date the intervention plan will begin: **M 8 Feb 2016**

**Meeting Minutes Form: p. 17**
Tier 3: RTI Team: Meeting Format

STEP 5: Design an Intervention Plan.

SAMPLE QUESTIONS: Questions that can help to build an intervention plan include:

• **What intervention strategies can address the student’s academic deficit/challenging behaviors?**

• **Are there additional documents describing this particular intervention that we may want to attach to the student’s intervention plan?**

• **This intervention idea seems like a useful one. Who would be responsible for carrying it out?**
Tier 3: RTI Team: Meeting Format

**STEP 5: Design an Intervention Plan.**

**TIP:** Team members may want to look over the RTI referral form prior to the initial RTI Team meeting—and locate and bring to the meeting research-based intervention ideas that match the student's academic or behavioral issue(s). This preparation can ensure that intervention ideas are research-supported and that the Team has a sufficient number of good intervention strategies with which to work.
RTI Problem-Solving Team: Initial Meeting Minutes Form p. 19

STEP 6: Share RTI Intervention Plan With Parent(s).

STEP 6: Share RTI Intervention Plan With Parent(s). Keeping the parent(s) updated about their child’s intervention plan is important.

Who will ensure that the parent(s) receive a copy of the completed 'Intervention Plan: At-a-Glance' developed at this meeting, as well as any related intervention documents?

Step 7: Review the Intervention and Progress-Monitoring Plans. At the close of the meeting:

☐ the recorder reviews the main points of the intervention (STEP 5) and progress-monitoring (STEP 4) plans with the team;

☐ the RTI Team schedules a date and time for the follow-up meeting on this student. NOTE: Generally, follow-up meetings are scheduled 6-8 instructional weeks from the start date of the intervention plan (listed in Step 5).

Follow-Up Meeting Date and Time: ____________________________
Tier 3: RTI Team: Meeting Format

STEP 6: Share RTI Intervention Plan With Parent(s).

GOAL: The RTI Team selects someone to contact the parent(s) (if they could not attend the RTI Team meeting) and to send them a copy of the intervention plan developed for their child.
Tier 3: RTI Team: Meeting Format

STEP 6: Share RTI Intervention Plan With Parent(s).

SAMPLE QUESTION:

- Who will ensure that the parent(s) receive a copy of the completed 'Intervention Plan: At-a-Glance' developed at this meeting, as well as any related intervention documents?
Tier 3: RTI Team: Meeting Format

STEP 6: Share RTI Intervention Plan With Parent(s).

TIP: If possible, the contact person who communicates with parent(s) about the student's intervention plan should be one of the educators who will be providing the student with intervention services. The interventionist connecting directly with the parent can ensure good communication and increased accountability.
RTI Problem-Solving Team: Initial Meeting
Minutes Form p. 19

STEP 7: Review the Intervention and Progress-Monitoring Plans.
Tier 3: RTI Team: Meeting Format

STEP 7: Review the Intervention and Progress-Monitoring Plans.

GOAL: The Team takes a moment at the end of the meeting to review the student's intervention and progress-monitoring plans to check that all are in agreement about them and that those with an active part in either plan fully understand their roles and responsibilities. The Team also schedules a follow-up RTI Team meeting at a date 6-8 instructional weeks in the future.
Tier 3: RTI Team: Meeting Format

STEP 7: Review the Intervention and Progress-Monitoring Plans.

SAMPLE QUESTIONS:

- Now that we have reviewed the intervention and progress-monitoring plans that we put together today, does anyone have questions about the plan or their responsibilities?

- Please look at your calendars. What is a good date for us to meet again for a follow-up meeting on this student?
Activity: Evaluate Your Tier 3 RTI Team

- As a team, review the items on the RTI Problem-Solving Team Meeting 'Quality Indicators' Checklist.
- Use this instrument to rate elements of your current RTI Team that are strong and those that need improvement.
- Based on your rating, talk about an action plan to make improvements to your Team.
RTI: Tier 3: Intensive Intervention

Here are key tasks that schools can pursue to advance Tier 3:

- Train your RTI Team to follow a structured meeting agenda that moves reliably through the steps of the problem-solving process.

- Create the capacity for case managers to pre-meet with referring teachers to clarify referral concern(s) and decide what assessment data to bring to the initial RTI Team meeting.

- Develop a Tier 3: RTI Team referral process that is timely—and also capable of screening out students whose needs can better be met at the Tier 1 or Tier 2 level.

- Create decision rules in coordination with the Special Education Department to determine when a student with serious academic deficits should be considered a 'non-responder' and referred for a Special Education evaluation.
Tier 3 RTI Team: Practice. What is the experience of participating in an RTI Team meeting?
Tier 3 RTI Problem-Solving Team: Practice Meeting

Your group will conduct a practice initial RTI Team meeting to try out the roles and steps of the process.

STEP 1: Assign the following roles to group members:

- **Referring teacher**: has the most knowledge of the student and initiated the RTI Team referral.
- **Facilitator**: runs the meeting.
- **Recorder**: keeps a record of the meeting and plan.
- **Case Manager**: has met with the teacher for a pre-meeting; helps to co-present the student case.
- **RTI Team COACH**: Provides prompts, advice and debriefing as needed to help the Team move through the meeting steps.
Tier 3 RTI Problem-Solving Team: Practice Meeting

STEP 2: Prepare for your meeting:

- Each member of your Team will have the RTI Team Facilitator’s Guide open (p. 5 in your handout) as a reference.
- The facilitator will have looked over the RTI Team ‘talking points’ (p. 11).
- The recorder will look over the table copy of the RTI Team Initial Meeting Minutes form (pp. 16-20 in the handout).
- The referring teacher and case manager will review the student referral form.
- The RTI Team COACH will skim the RTI Team Facilitator’s Guide to review the meeting steps/overall ‘flow’.
RTI Problem-Solving Team: Facilitator’s Guide p. 6

RTI Problem-Solving Team: Facilitator’s Guide

Facilitators can use this guide to ‘walk’ them through RTI Team meetings and to ensure that the RTI/Problem-Solving Team: Initial Meeting Minutes Form fully documents the student’s intervention.

Introductions/Talking Points. As facilitator, an effective way to open the meeting is briefly to review key ‘talking points’ that (1) state the purpose of the meeting, (2) introduce team members and assigned roles, (3) remind participants of time constraints, (4) review the agenda, and (5) present expectations for active participation.

Beginning the meeting with consistent talking points is a good means of reminding participants that the RTI meeting follows a structured format, that time is precious, and that all attending have a voice in the discussion.

See the RTI Problem-Solving Team: Initial Meeting: Introductory Talking Points that appears later in this document for a sample script that can be used at the meeting opening.

STEP 1: Select Intervention Target(s).

GOAL: The goal during this meeting segment is to verify that ‘intervention targets’ (problem description) are described in sufficient detail and that each intervention target has been matched to at least one ‘probable cause’ or ‘function’ that helps to explain why the academic or behavioral problem is happening. See table 1 below for a listing of common reasons for behavioral and academic problems:

<table>
<thead>
<tr>
<th>TABLE 1: Probable Cause/Function for Concerns: Sort into 3 choices</th>
</tr>
</thead>
<tbody>
<tr>
<td>Behavioral</td>
</tr>
<tr>
<td>-----------------</td>
</tr>
<tr>
<td>□ Leaks necessary skills</td>
</tr>
<tr>
<td>□ Has the necessary behavioral skills but is not motivated by the instructional task/setting to comply/behave appropriately</td>
</tr>
<tr>
<td>□ Seeks attention from adults</td>
</tr>
<tr>
<td>□ Seeks attention from peers</td>
</tr>
<tr>
<td>□ Reacts to teasing/bullying</td>
</tr>
<tr>
<td>□ Tries to escape from instructional demands or setting</td>
</tr>
<tr>
<td>□ Attempts to hide academic deficits through noncompliance or other misbehavior</td>
</tr>
</tbody>
</table>
## RTI Problem-Solving Team: Initial Meeting Minutes Form

### Student: _____________________________________ Grade/Program: ___________________ Date: ______________

### Attending: ____________________________________

### STEP 1: Select Intervention Target(s).

Describe up to 2 academic and/or behavioral targets to be the focus of this intervention plan. Consult the RTI Team Facilitator’s Guide to choose a likely cause or function for each.

<table>
<thead>
<tr>
<th>Intervention Target</th>
<th>Probable Cause/Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
</tbody>
</table>

### STEP 2: Inventory Student’s Strengths, Talents, Interests, Incentives.

List student strengths, talents, and/or any activities or incentives that the student finds motivating.

<table>
<thead>
<tr>
<th>List: Strengths, Talents, Interests, Incentives</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
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<td>☐</td>
</tr>
</tbody>
</table>

### STEP 3: Review Background/Baseline Data.

Summarize relevant background or baseline information that reveals the student’s current level of functioning (e.g., attendance, office disciplinary referrals, student grades, Curriculum-Based Measurement data, Daily Behavior Report Card ratings, direct observations of behavior, etc.).

<table>
<thead>
<tr>
<th>Name of Data Source</th>
<th>Data Value(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source 1:</td>
<td></td>
</tr>
<tr>
<td>Source 2:</td>
<td></td>
</tr>
<tr>
<td>Source 3:</td>
<td></td>
</tr>
</tbody>
</table>
Tier 3 RTI Problem-Solving Team: Practice Meeting

STEP 3: Run your meeting:

• The facilitator takes the Team through the meeting step-by-step.

• All Team members contribute to the discussion.

• The RTI Team COACH is an observer but steps in to offer guidance as needed. The coach or any team member can call ‘time out’ to ask clarifying questions or offer feedback about the meeting process.
STEP 4: Debrief:

- The RTI Team members and COACH review the meeting process.
- Participants identify elements of the meeting that went well, as well as those that need improvement. The Team brainstorms solutions to address areas of improvement.
Team Activity: What Plan Will You Adopt to Build Teacher Understanding and Support for RTI?

At your table:

- Define (1) the RTI information that teachers in your school should know by the end of the current school year, and (2) the kind of teacher ‘buy-in and support’ that you would like to see by the end of the year.

- Consider all of the presentation and staff development opportunities that you have to share information with teachers about RTI (e.g., faculty meetings, staff development days, instruction team or department meetings).

- Map out plan throughout the present school year to deliver the appropriate RTI information to teachers to accomplish your goals.
Tier 3 RTI Team: Choose the Path. What are steps that your school can take during this school year to advance RTI Teams?
Workshop Agenda: Tier 3: RTI Teams

• Tier 3 Problem-Solving Team: What It Is. What is the purpose of the RTI Team and where does it fit within the RTI Tiers?

• Tier 3 RTI Team: Membership & Roles. Who serves on the RTI Team and what are the Team roles?

3. Tier 3 RTI Team: Meeting Agenda. How is the RTI Team meeting structured?

4. Tier 3 RTI Team: Practice. What is the experience of participating in an RTI Team meeting?

5. Tier 3 RTI Team: Choose the Path. What are steps that your school can take during this school year to advance RTI Teams?
Next Steps: Activity

In your groups:

• Review the 4 goal statements on the next-steps planner (on right).

• For each goal, develop a plan to move toward that goal in the current year (list implementation steps, key people, resources needed, additional comments).

• Be prepared to report out!
Tier 3: Developing an RTI Problem-Solving Team for Intensive Intervention Planning

Participants: ____________________________ Date: ____________________________

School: ____________________________

GOAL 1: The Tier 3 RTI Problem-Solving Team has set clear guidelines for what intervention efforts should occur before an RTI Team Meeting is scheduled and when a student is ready to be referred to the Team.

<table>
<thead>
<tr>
<th>List the 'next steps' that you plan to follow to accomplish this goal:</th>
<th>Who in your school or district will you need to enlist to help you with this goal?:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
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<td>3.</td>
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<td>4.</td>
<td>4.</td>
</tr>
<tr>
<td>5.</td>
<td>5.</td>
</tr>
</tbody>
</table>

What resources will you need beyond those supplied in this training to accomplish the goal?

1. ____________________________
2. ____________________________

Comments:

GOAL 2: The membership of the RTI Team is sufficiently diverse to address a range of student academic and behavioral problems.

<table>
<thead>
<tr>
<th>List the 'next steps' that you plan to follow to accomplish this goal:</th>
<th>Who in your school or district will you need to enlist to help you with this goal?:</th>
</tr>
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<tbody>
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<td>2.</td>
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<td>3.</td>
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<td>4.</td>
<td>4.</td>
</tr>
<tr>
<td>5.</td>
<td>5.</td>
</tr>
</tbody>
</table>

What resources will you need beyond those supplied in this training to accomplish the goal?

1. ____________________________
2. ____________________________

Comments: