

Problem-Solving Team Meeting Checklists — Initial & Follow-Up Versions

Description & Purpose

Theoretical Background

The *Problem-Solving Team Checklist – Initial and Follow-Up Versions* is an integrity measure used to assess the extent to which schools are implementing the critical components of the problem-solving process during meetings focused on the educational progress of individual students. Implementation of an innovation such as PS/RTI is a gradual process that occurs in stages, not a one-time event (Fixsen, Naoom, Blasé, Friedman, & Wallace, 2005). Because many educational reform efforts fail due to lack of implementation (Sarason, 1990), it is critical that implementation integrity of any innovation (e.g., implementation of new practices) be examined. Several methods for examining implementation integrity exist. These methods can be divided into three categories: **self-report**, **permanent product reviews**, and **observations** (Noell & Gansle, 2006).

Description

The *Initial Version* is intended to assess implementation of the first three steps of the problem solving process during individual student focused data meetings. This version of the measure contains 26 items that assess which key roles and responsibilities are represented (nine items) and which components of the problem-solving process are present (17 items) during individual student focused data meetings. The *Follow-Up Version* is intended to assess implementation of the fourth step of the problem solving process during meetings intended to determine the progress a student made following implementation of an intervention plan. The *Follow-Up Version* contains the same nine items intended to assess roles and responsibilities

Self-report: Individuals responsible for implementation provide information on the extent to which the practices occurred.

Permanent Product Reviews: Relevant documents (e.g., graphs, notes, worksheets) related to implementation are examined for evidence of the target practices.

Observations: Individuals directly observe applications of the target practices when they are expected to occur.

present as the *Initial Version* as well as six items assessing implementation of the components of examining student RtI. Trained observers complete the checklists while attending meetings by checking present or absent. A space for additional notes or explanations is provided to allow observers to clarify their response if needed.

Purpose

The purpose of the *Problem-Solving Team Meeting Checklists* is to provide a reliable source of information on the extent to which educators implement PS/RtI practices when examining individual student progress. Observational protocols tend to result in more reliable data than self-report and permanent product review methodologies. However, observations are a more resource-intensive data collection method that requires training, time to travel to meetings, time to attend meetings when they occur, etc. Typically, a combination of the three implementation integrity assessment methods can be used to maximize use of resources and provide a reliable picture of what practices are being implemented. Therefore, decisions regarding how much to use observations such as the *Problem-Solving Team Meeting Checklists* should be made based on resources available to conduct observations.

Intended Audience

Who Should Complete the Problem-Solving Team Meeting Checklists?

It is highly recommended that individuals completing the checklist have expertise in the PS/RtI model and skills in conducting observations. Specifically, observers must understand the problem-solving process to identify the extent to which steps are occurring during individual student focused data meetings. The title of individuals completing the checklists is not as important as the skill sets needed. Staff with the requisite skill sets in schools that have worked with the Florida PS/RtI Project are PS/RtI Coaches; however, school psychologists, literacy specialists, or educators from other disciplines may possess the requisite knowledge and skills or be candidates for professional development.

Who Should Use the Results for Decision Making?

School-Based Leadership Team (SBLT) members should receive data on implementation levels from the *Problem-Solving Team Meeting Checklists*. SBLTs are comprised of approximately six to eight staff members selected to take a leadership role in facilitating PS/RtI implementation in a school. Staff included on the SBLT should have the following roles represented: administration, general education teachers, student services, special education teachers, and content specialists (e.g., reading, math, behavior). SBLT members should receive training on the PS/RtI model including strategies for facilitating implementation (i.e., systems change principles and strategies referred to in the Introduction). Individuals on the team also should adopt certain roles and responsibilities to ensure efficient and productive planning and problem-solving meetings. Important responsibilities include a **facilitator**, **time-keeper**, **data coach**, and **recorder**, in addition to providing expertise in the particular content areas or disciplines listed above.

Facilitator:

Responsibilities of facilitators tend to include preparation for meetings, ensuring participation and involvement of team members, encouraging team members to reach consensus regarding decisions being made, and keeping the conversations focused on the task being discussed (e.g., problem-solving student performance, planning for professional development).

Timekeeper:

Timekeepers are responsible for providing periodic updates to team members regarding the amount of time left to complete a given task or discussion during meetings.

Data Coach: Data coaches provide assistance with interpreting data and using it to inform decisions.

Recorder: Recorders are responsible for taking notes for the purpose of capturing the important discussions and outcomes of meetings.

District-Based Leadership Team (DBLT) members also should receive the results for the district's schools individually as well as aggregated at the district level. Members of the DBLT provide leadership to schools implementing PS/RtI practices. Examples of leadership provided by DBLT members include facilitating the creation of policies and procedures to support implementation, providing access to professional development targeting the knowledge and skills of educators in the district, and meeting with schools to review implementation and student outcomes. Staff included on the team mirror the SBLT in terms of representation of disciplines and roles and responsibilities.

Importantly, SBLTs and DBLTs may find it helpful to work with a PS/RtI Coach or other stakeholder with expertise in PS/RtI practices to discuss findings from the checklist. Coaches can assist with interpretation of the results as well as facilitating problem-solving to address barriers to implementation.

Directions for Administration

Step 1

Identify the content areas and grade levels the school(s) target for implementation. Schools and districts vary in terms of how quickly they plan to scale-up PS/RtI practices. The literature on PS/RtI implementation suggests that a long-term, multi-year plan for incrementally scaling-up new PS/RtI practices should be followed (Batsche et al., 2005). However, educators may decide to attempt scaling-up faster for myriad reasons (e.g., can dedicate more resources to the initiative, mandates requiring practices be implemented immediately). Therefore, it is important for stakeholders responsible for facilitating data collection or for directly completing the checklist to understand which content areas and grade levels schools are targeting for implementation.

Step 2

Determine what individual data meetings schools use to examine individual student progress. Traditionally, special education eligibility has been the driving force behind many meetings examining individual student progress. The PS/RtI model suggests that decisions about special education services should be made based on how students respond to evidence-based interventions. Therefore, meetings to problem solve individual student issues should first be focused on finding services that work and secondarily on whether special education resources are needed to maintain the level of services required. However, schools vary in terms of their buy-in to this philosophy as well as how they structure meetings to examine individual student progress. Because of this variability, observers must determine what meetings schools use to problem solve individual student issues. Some schools only have intervention-focused meetings and make decisions about special education when it become necessary to maintain services, some schools have separate meetings for problem-solving for intervention development versus making decisions about evaluations for special education eligibility, while other schools only focus on eligibility issues when addressing problems at the individual

student level. Understanding how schools address individual student issues will allow observers to identify the appropriate meeting(s) and schedule times to conduct observations. Importantly, the *Problem-Solving Team Meeting Checklist* should NOT be completed during data meetings at which Tier I and/or II problem-solving is the primary focus.

Step 3

Develop a plan for sampling data meetings examining individual student progress. Once relevant data meetings are identified, a plan for sampling meetings should be developed. Although observing all meetings for implementation integrity assessment may be ideal, it may not be realistic for many schools and districts given available resources. Decisions regarding how to observe a sample of meetings should be made based on personnel and time available as well as what other implementation integrity data will be collected. For example, Project RtI Coaches were asked to observe one or two student cases (i.e., observing all meetings conducted for a given student throughout the year) per school. Because pilot schools did not always schedule meetings months in advance, Project staff believed that randomly selecting meetings was not feasible for Coaches. Therefore, Coaches were asked to select one or two students (the frequency of cases to observe was adjusted from year to year based on other data Coaches were required to collect) based on availability and schedules. Because implementation integrity also was being assessed using self-report and permanent product methodologies (referred to elsewhere in this manual), Project staff decided that this sampling would provide adequate information on the extent to which PS/RtI practices were observed (i.e., the data could be compared with other sources of information on implementation integrity).

Step 4

Determine who to contact at schools to schedule observation days and times. Perhaps one of the most difficult parts to conducting observations is scheduling days and times to conduct them. Schools and districts vary in terms of when these meetings are scheduled and the extent to which they may be rescheduled or cancelled. Therefore, it is recommended that observers identify a contact person at each building (e.g., principal, guidance counselor, school psychologist) to determine when and where the observations should be conducted based on the plan developed in Step 3. A contact person will not only allow observers to schedule observations but also could be a valuable conduit should meetings be rescheduled or cancelled.

Step 5

Conduct the observation at scheduled meetings. Checklists should be completed in accordance with the plan developed in Step 3. General guidelines for scoring items on the checklist were created by the Project and are available in *Supplements*, page 186. It is important that the person completing the checklist have a thorough understanding of the PS/RtI model because those participating in the meeting may not follow the problem-solving process in the exact order in which the steps are listed on the checklist. In other words, the reviewer needs to be knowledgeable

enough of the problem-solving process to be able to identify components of problem solving that may not be clearly indicated nor occur in a particular order during the meetings.

Step 6

Complete inter-rater agreement procedures when applicable. Ensuring that observations are completed accurately is critical to data collection. For this reason, it is recommended that two reviewers observe the same meeting periodically. This procedure allows observers to discuss differences and come to consensus regarding how to score particular items when conducting future observations. The extent to which inter-rater agreement procedures take place depends on the time and resources available to observers. It is recommended that observers reach 85% inter-rater agreement to continue completing observations independently. Inter-rater agreement levels below 85% may indicate that retraining is necessary. An example of how inter-rater agreement procedures were established for Project PS/RtI Coaches is available in *Supplements*, page 187.

Common Issues to Address When Completing Observations

There are a few things to keep in mind when conducting observations. As individuals completing the checklist may be part of the school staff or assigned to coach them, they may find themselves participating in the meetings they are observing. If the person completing the checklist is also participating in the meeting, it is important that they not influence the meeting to reflect components of the checklist. The observer should try to remain more of a passive participant and refrain from offering ideas or suggestions that would influence the completion of the checklist. The checklist should be completed with an objective perspective of what occurred during the meeting. In addition, other staff participating in the meeting may behave differently simply because they know they are being observed. Thus, the observer should try to complete the checklist as unobtrusively as possible to avoid influencing the members' actions in ways that are not reflective of those that occur during typical meetings.

Frequency of Use

When determining how often observers should complete the *Problem-Solving Team Meeting Checklists*, it is important to consider the resources available within schools and districts so that plans for data collection are adequately supported. Important considerations include the time needed for completion of the instrument; the time required to enter, analyze, graph, and disseminate data; the personnel available to support data collection, and other data collection activities in which SBLT members and school staff are required to participate. Completing the *Problem-Solving Team Meeting Checklists* requires a thorough understanding of content related to the problem-solving process and implementing PS/RtI models. The extent to which individuals with this content knowledge are available and/or can be thoroughly trained will impact how often the checklists can be completed. In other words, decisions about how often to collect data using the *Problem-Solving*

Team Meeting Checklists should be made based on the capacity to administer, analyze, and use the information to inform plans to scale-up PS/RtI implementation.

Given that school and district resources to facilitate data collection vary, it is difficult to provide specific recommendations for how often to administer the *Problem-Solving Team Meeting Checklists*. Sampling representative individual student focused meetings is one way to make the observation methodology more manageable. *Supplements*, page 187 contains information on how Florida PS/RtI Project Coaches completed the observation protocols including how often they were completed.

Technical Adequacy

Content Validity Evidence

To inform development of the *Problem-Solving Team Checklists*, Project staff reviewed relevant literature, presentations, instruments and previous program evaluation projects to develop an item set that would be representative of the critical components of implementing PS/RtI practices during data meetings. Specifically, Project staff reviewed literature and publications related to problem-solving (e.g., Bergan & Kratochwill, 1990; Batsche et al., 2005) and systems change (e.g., Curtis, Castillo, & Cohen, 2008; Hall & Hord, 2006) to identify critical components of the problem-solving process (for more information, please see page 2 of this document) and important roles and responsibilities (for more information, please see page 171 of this document) that should be represented in meetings. Relevant information was identified, analyzed, and compared to existing individual student focused measures of problem-solving integrity to select those components that would be assessed by the instrument.

Inter-Rater Agreement

Preliminary analyses of *Problem-Solving Team Meeting Checklists* data suggests that use of the instrument has resulted in consistent scoring across trained observers. Two observers independently completed the checklist while observing the same meeting on selected checklists and calculated inter-rater agreement estimates using the following formula: agreements divided by agreements plus disagreements. The average inter-rater agreement estimates derived from independently observed data meetings during the 2008-09 and 2009-10 school years were 94.24% (n=21) for the *Initial Version* and 95.44% (n=18) for the *Follow-Up Version*.

Scoring

Analysis of Responses to the Observation Checklist

The Florida PS/RtI Project has primarily utilized two techniques for analyzing data for formative evaluation purposes. First, the mean rating for each item can be calculated to determine the average implementation level evident in individual student focused data meetings observed. Second, the frequency of (i.e., frequency distribution) each response option selected (i.e., Absent and Present) by observers can be calculated for each survey item.

Content validity: Content-related validity evidence refers to the extent to which the sample of items on an instrument is representative of the area of interest the instrument is designed to measure. In the context of the *Problem-Solving Team Meeting Checklists*, content-related validity evidence is based on expert judgment that the sample of items on the *Problem-Solving Team Meeting Checklists* is representative of the critical components of problem solving at the individual student level.

For example, if an observer selected *Absent*, *Present*, *Present*, *Absent*, *Present* when completing Items 10-14 that comprise the “Problem Identification” section, the values corresponding with those responses would be added together to obtain a total value of 3 (i.e., 0+1+1+0+1=3). The total value of 3 would be divided by the number of items (5) to obtain the domain score (i.e., $3/5 = .6$). A domain score of .6 could be interpreted as the team implementing more of the components of Problem Identification than were missed (i.e., a score of .5 would represent half of the components within a domain implemented and a score of 1 would represent implementation of all of the components within a domain).

Calculating item means provides an overall impression of the implementation level of problem solving steps. When calculating average implementation levels, a value of “0” should be used for items checked *absent* while a value of “1” should be used for items checked *present*. Calculating average implementation levels can be done at the domain and/or individual item levels. Examining implementation at the domain level allows educators to examine general patterns in (1) having key roles and responsibilities represented (personnel present); and implementing the components of (2) Problem Identification, (3) Problem Analysis, (4) Intervention Development/Support, and (5) Program Evaluation/RtI. A domain score for each of the five domains measured by the two versions of the instrument may be computed for checklists completed by computing the sum of the ratings of the items that comprise the domain. These values can then be added together and divided by the number of items within the domain to **produce an average level of implementation for each domain**. The four domains examined by the *Initial Version* and the items that comprise them are as follows:

- **Domain 1** (*Key Roles and Responsibilities; i.e., Personnel Present*): Items 1-9
- **Domain 2** (*Problem Identification*): Items 10-14
- **Domain 3** (*Problem Analysis*): Items 15-18
- **Domain 4** (*Intervention Development/Support*): Items 19-26.

The two domains measured by the *Follow-Up Version* are as follows:

- **Domain 1** (*Key Roles and Responsibilities; i.e., Personnel Present*): Items 1-9
- **Domain 5** (*Program Evaluation/RtI*): Items 10-15.

Average levels of implementation also can be examined by item. Calculating the mean rating for each item within a domain allows educators to identify the extent to which educators are implementing specific components of PS/RtI. This information can be used to identify specific steps of the process that may need to be addressed systematically (through professional development, policies and procedures, etc.) but does not provide information on the range of implementation levels.

Calculating the frequency of meetings in which PS/RtI practices were present or absent for an item, on the other hand, provides information on the range of implementation levels. This information can be used to determine what percentage of schools, grade levels or other units of analysis (e.g., districts, intermediate versus primary grade levels) implemented or did not implement components of PS/RtI. When making decisions about how to address implementation levels, information on the number of schools implementing a particular component can help inform decisions regarding moving forward with implementation. For example, questions such as “Should we address implementation with a few schools versus all of them?” or “Are there particular steps that many schools struggle with?” may be answered more readily with frequency data.

It is recommended that key stakeholders analyze *Problem-Solving Team Meeting Checklists* data in ways that best inform the evaluation questions they are asking. The data collected from the instrument can be used to answer a number of broad and specific questions regarding the extent to which educators are implementing the PS/RtI model. To facilitate formative decision-making, stakeholders should consider aligning the analysis and display of the data with specific evaluation questions. For example, questions regarding general trends in implementation of the four problem-solving steps may best be answered by calculating and displaying domain scores. Questions about implementation of specific components of the problem solving process may best be answered by calculating and displaying the number of meetings at which the components were present. In other words, identifying which evaluation question(s) are currently being answered will guide how to analyze the data and communicate the information to facilitate decision making.

Technology Support

School personnel should consider using district supported or commercially available technology resources to facilitate analyses of the data. Software and web-based programs vary in terms of the extent to which they can support administration of an instrument (e.g., online administration) and automatic analysis of data, as well as how user-friendly they are. Decisions about what technology to use to facilitate analysis should be made based on available resources as well as the knowledge and skills possessed by those responsible for managing and analyzing data from the survey.

Training Required

Training Recommended for Individuals Completing Observations Using the Problem-Solving Team Meeting Checklists

Qualifications of the observer. Personnel in charge of conducting observations using the *Problem Solving Team Meeting Checklists* should have a thorough understanding of the problem-solving process. If individuals with expertise in PS/RtI are not available, observers should receive thorough training in the PS/RtI model prior to being trained to use the checklist. Skills and experience in conducting behavioral observations is recommended but not required.

Content of the training. Trainings on conducting observations using the *Problem-Solving Team Meeting Checklists* should include the following components:

- Theoretical background on the relationship between implementation integrity and desired outcomes
- Each item should be reviewed so that observers have a clear understanding of what is being measured. The *Item Scoring Description* located in *Supplements*, page 188 is a useful tool for providing observers with guidance on how to score each item.
- In addition to explaining the rationale for the instrument and what each item measures, trainings should include modeling, opportunities to practice, and feedback to participants. First, participants in the training may be provided

the opportunity to watch a video recorded individual student focused data meeting while a trained observer models completion of the checklist. The trained observer can pause the video frequently, indicating which items s/he is completing and why s/he checked absent or present for that item. Next, participants should be provided the opportunity to practice completing the measure independently while watching another recorded data meeting. Trained observers can choose to pause the video and ask participants how they scored certain items or allow the video to finish before reviewing the items. Participants and the trained observer should discuss how they scored the items and come to consensus regarding how to score disagreements in the future. Finally, participants may complete the checklist independently on a third recorded data meeting. Following the completion of the video, participants should calculate inter-rater agreement with a partner by dividing the number of agreements by the number of agreements plus disagreements. It is recommended that 85% agreement be reached among participants before conducting observations independently. Importantly, it is recommended that this process be applied to both the *Initial and Follow-Up Versions* as different components of PS/RtI are measured by the two versions.

- Finally, the training should include a review of the district, school, or other agency's plan for conducting observations so that the participants can learn what observations they will be responsible for and ask questions about the plan.

Training Suggested for Analyzing, Interpreting, and Disseminating Tier I & II Observation Checklist Results

The knowledge, skills, and experience of educators in analyzing, interpreting, and using data for formative decision-making vary. If the stakeholders responsible for these activities possess the knowledge and skills required then training specific to the *Problem-Solving Team Meeting Checklists* may not be necessary. However, should the stakeholders responsible for using the data lack any of the aforementioned skill sets, training and technical assistance is recommended. Topics on which support might be provided are:

- Appropriate use of the checklist given its purpose and technical adequacy
- Guidelines for analyzing and displaying data derived from the instrument
- Guidelines for interpreting and disseminating the results

The contents of this manual provide information that can be used to inform trainings on the aforementioned topics.

Interpretation and Use of the Data

Examination of Broad Domains

When interpreting *Problem-Solving Team Meeting Checklists* data, it is recommended to start by examining the five broad domains measured by the checklists (i.e., roles and responsibilities represented [personnel present], Problem Identifica-

tion, Problem Analysis, Intervention Development/Support, and Program Evaluation/RtI). Educators can examine graphically displayed data to evaluate trends in implementation levels in each domain measured. Each of the methodologies for scoring mentioned above (i.e., calculating average implementation levels at the domain and item levels and calculating the frequency/percent of specific components present at the item level) can be used to examine the broad domains. One methodology used frequently by Project staff when examining data from the *Problem-Solving Team Meeting Checklists* is to take note of the percent of components present within each domain. The percent of components present within each domain is the conceptual interpretation of the domain score (i.e., the formula described above for calculating average implementation at the domain level can be interpreted as the percent of components present within the domain). This type of visual analysis (an example of a graph used is provided below) allows educators to determine the extent to which the major steps of problem solving are occurring as well as whether important roles/responsibilities are represented at data meetings. This approach can be used to examine implementation levels for any given administration as well as to examine trends over time.

Identification of Specific Needs

Each item within the domains also can be graphed to examine trends in which components tend to be implemented more or less frequently. Considerations when identifying which components are being implemented at relatively high versus low levels include what training educators have received and how long implementation has been occurring. Given that educators must possess the necessary skills to implement and that implementation takes time, key stakeholders will need to identify components of the process that require additional strategies to facilitate increased implementation versus allowing already existing plans (e.g., professional development to be delivered, pending procedure changes) to take effect. Barriers to implementing the problem-solving process with integrity may include systemic issues such as school policies that are inconsistent with PS/RtI practices, lack of time for meetings so that teams can engage in the problem-solving process, lack of professional development dedicated to the skills required, among others. Given the multiple interacting variables that impact implementation, it is important to consider all aspects of the system that contribute to or impede implementation when developing plans to address barriers.

Although conducting observations is a reliable method for examining implementation integrity, available resources may limit the extent to which they can be conducted. Given this reality as well as the importance of using multiple sources of data to address evaluation questions, it is recommended that data from observations be compared with other data/information on integrity (other tools for examining implementation integrity are discussed elsewhere in this manual).

Data Dissemination to Stakeholders

It is important that implementation integrity data dissemination and examination among key stakeholders be included in a plan to scale-up PS/RtI practices. It is

recommended that these key stakeholders be identified and data be shared with them as quickly and frequently as possible following times when the checklist tends to be completed. This time line allows stakeholders such as SBLT members to discuss implementation levels suggested from the observation data, develop or alter implementation goals, and design strategies (e.g., professional development, access technology resources, develop procedures) to facilitate increased levels of implementation. DBLT members also may want access to data from schools to plan for professional development and other types of support provided at the district level. Additionally, SBLT and DBLT members may find it helpful to have a coach or facilitator discuss the data with members participating in meetings to facilitate interpretation and problem-solve barriers to implementation.

To facilitate discussions about implementation issues, one helpful strategy is to provide stakeholders with guiding questions. The use of guiding questions is designed to facilitate discussions about each school's implementation data, including potential strategies for increasing the use of PS/RtI practices. Listed below are examples of guiding questions used by the Florida PS/RtI Project to facilitate discussions regarding implementation integrity. These guiding questions were designed to facilitate discussions about each school's data, including current level of problem-solving implementation and consistency between observation data and other implementation integrity measures (e.g., other data sources are discussed elsewhere in this manual). However, stakeholders can generate additional guiding questions to better meet the needs of their school.

- What are the patterns?
 - ♦ What patterns are evident among each of the individual items on the checklist and across all data sources?
 - ♦ What steps of the problem-solving process are occurring more frequently? Less frequently?
 - ♦ Are there any current indicators that show a zero or low level of implementation? Why?
 - Have these been targeted in the past?
 - Do barriers exist with consensus or infrastructure?
 - Other priorities?
 - Meetings not happening or focusing on implementation?
- How have you progressed in implementing the Problem-Solving Model with fidelity?
 - ♦ Looking across all fidelity measures (CCC, SAPSI, and Observations), what are the general levels of implementation? What are the general trends?
 - ♦ Do the data from the Critical Component Checklist and Observations support what is evident in the SAPSI Items 22a-22i?
 - Are there discrepancies among the different sources of data with using the Problem-Solving model?
 - How might these discrepancies be interpreted?

School-Level Example of *Initial and Follow-Up Problem-Solving Team Checklists* Data

The following example demonstrates how key stakeholders may use data derived from the *Problem-Solving Team Meeting Checklists* to inform PS/RtI implementation. Data from the *Problem-Solving Team Meeting Checklists* are displayed graphically. Following the graph, background information on the school’s initiative and an explanation of what is represented on the graph is provided. Finally, ways in which the data were used by the school to monitor progress and identify needs is discussed. Importantly, although the example occurs at the school-level, the concepts discussed can be generalized to other units of analysis (e.g., district-level, state-level).

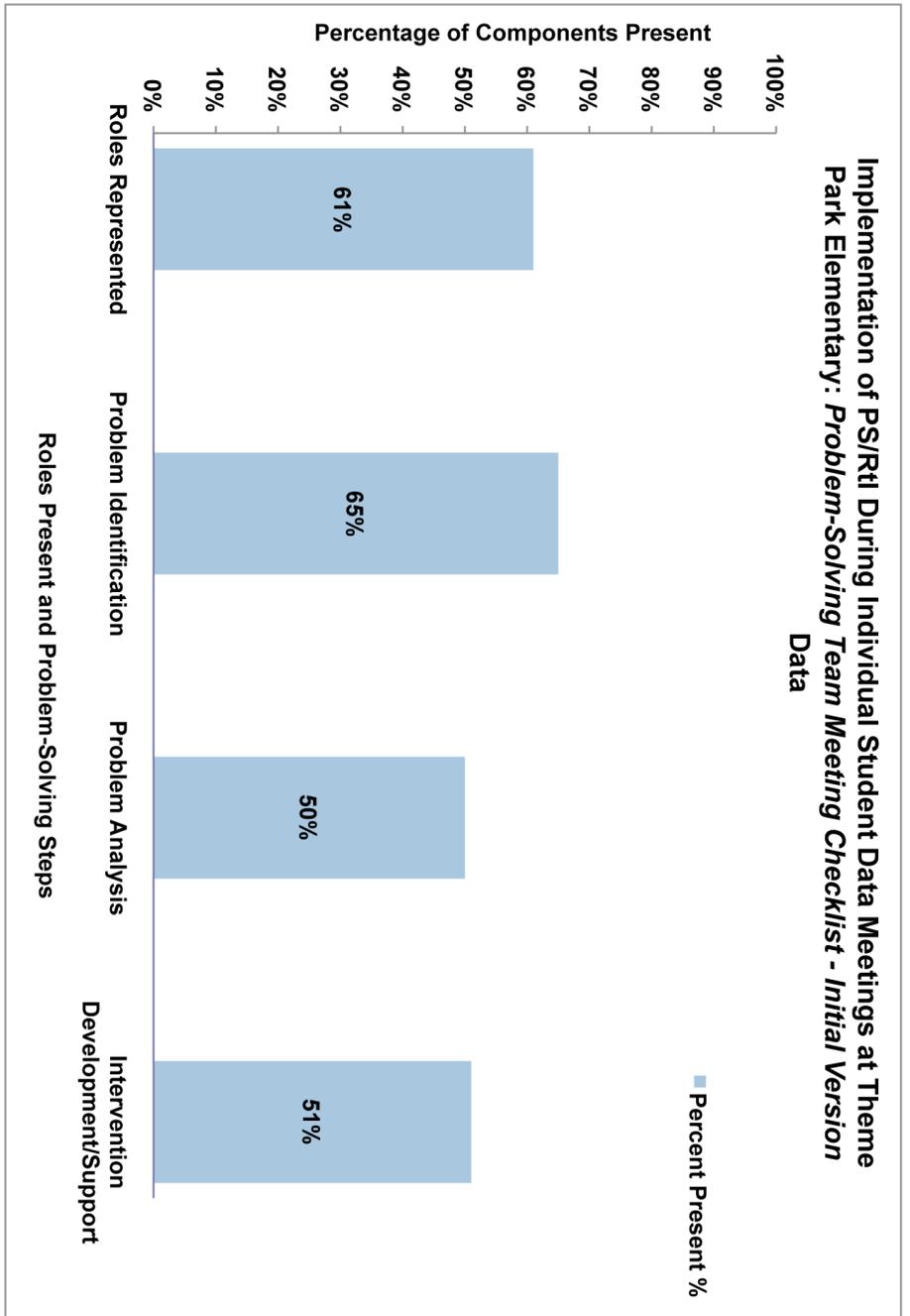


Figure 10. Example Problem-Solving Team Meeting Checklist Initial Version Graph

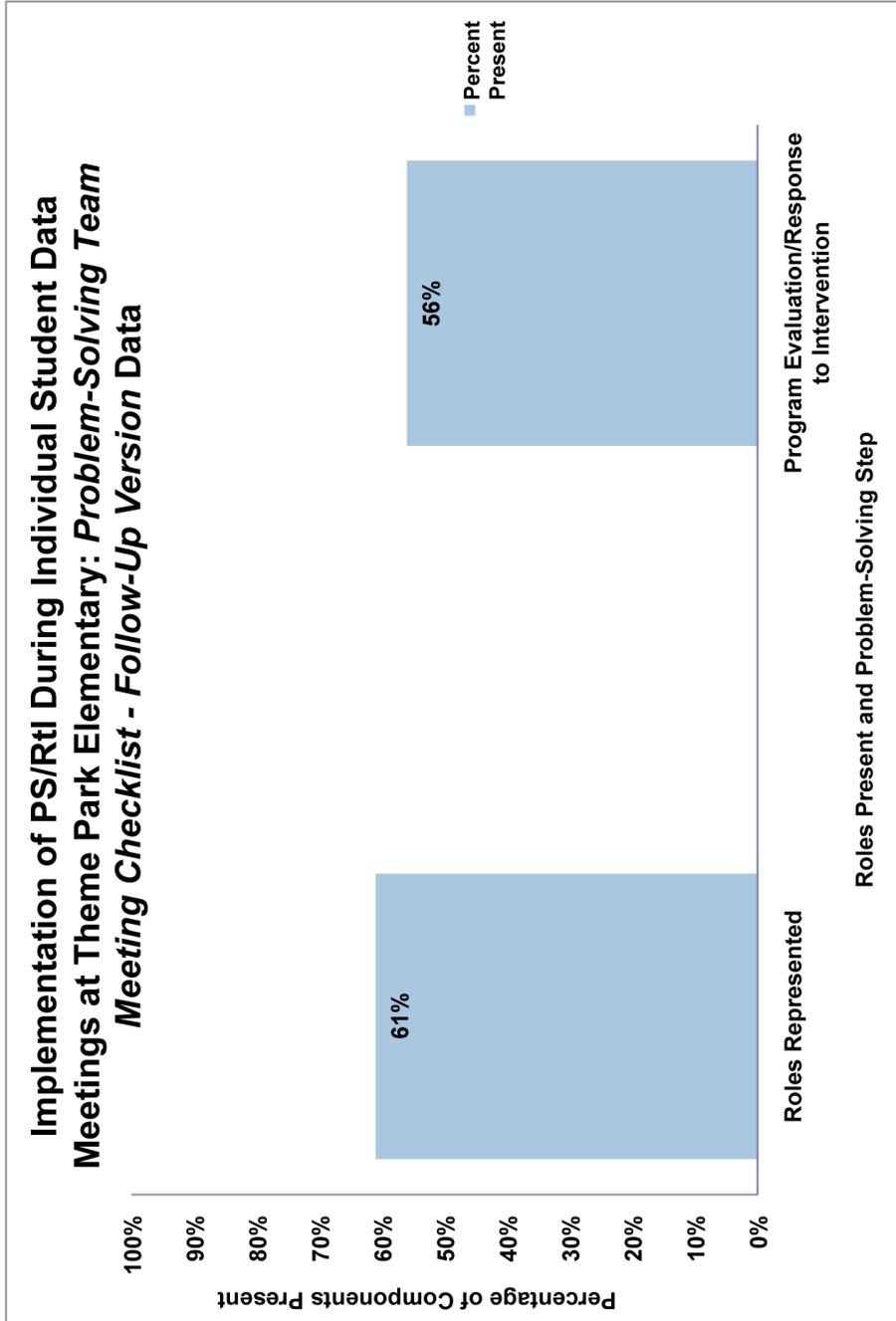


Figure 11. Example Problem-Solving Team Meeting Checklist Follow-Up Graph

Context for the Data

During the third year of PS/RtI implementation, Theme Park Elementary began focusing on using the problem-solving process during individual student focused data meetings. To examine implementation integrity, the PS/RtI Coach assigned to Theme Park Elementary conducted observations at selected meetings. The Coach was notified when students were brought up for data meetings and scheduled observations of the initial and follow-up meetings for multiple selected student cases across the year. At the end of the year, the PS/RtI Coach graphed the data for the SBLT at Theme Park Elementary to identify steps of the problem solving process that were being implemented versus those implemented with lower levels of integrity. The data are displayed in Figures 10 and 11 above. The bars in each graph represent the percentage of components marked as present across the checklists completed for the observed student focused meetings. The percentage was calculated by adding up the number of components present within each domain and dividing by the total number of possible components present within the domain.

Interpretation and use of the data

Examination of broad *Problem-Solving Team Meeting Checklist* domains. The data displayed in Figures 10 and 11 suggest that some implementation of the steps of problem-solving occurred during initial and follow-up meetings. The percentage of components present ranged from 50-65% for the five domains measured by the two versions of the instrument. SBLT members and the PS/RtI Coach agreed that these data suggested that the school engaged in some problem solving during the school year but that less than full implementation occurred. The data seemed to indicate that some roles and responsibilities were not represented during initial and follow-up meetings nor were the four steps of problem solving implemented with integrity. The team's consensus was that implementation of the entire PS/RtI model needed to be addressed.

Identification of specific needs. When discussing barriers to implementing problem-solving, one issue raised was that individuals participating in the meetings were not clear on the roles and responsibilities that were included on the checklist, which resulted in low implementation levels. Specifically, representation of administrators, general education teachers, and other personnel tended to occur; however, clearly identified facilitators, timekeepers and note-takers occurred less frequently. Team members suggested that open discussions at the start of each meeting regarding everyone's role and/or responsibility during the problem solving session would be helpful. A suggestion was made to hang a poster in the meeting room that states the responsibilities of all members so that the responsibilities can be reviewed when necessary. The poster would include a description of the roles. For example, the time keeper would be responsible for providing reminders of the remaining time to team members. The facilitator would prepare the necessary materials and coordinate with identified staff prior to the meeting, and guide the team through the problem-solving process (Burn, Wiley, Viglietta, 2008; Rosenfield et al., 2008).

Next, the extent to which steps of the problem-solving process were present during the individual student meetings was assessed. Team members discussed the extent to which difficulty in implementing the four steps of problem solving occurred because roles and responsibilities were not clearly identified versus lack of proficiency with components of the steps. After reviewing the components (i.e., specific items) within each step, the SBLT decided that the school tended to have difficulty with those steps that required specific information to be available at the meeting. Examples include information on peer performance levels (Problem Identification), using data to verify hypotheses for why students were not achieving benchmarks (Problem Analysis), concretely developing a plan for implementing an intervention (Intervention Development/Support) and documenting evidence that the intervention plan was implemented as intended (Program Evaluation). The PS/RtI Coach suggested that the facilitator responsible for the meetings work to ensure that the necessary information is available by collaborating with appropriate staff ahead of time and disseminating the information to participants prior to the meeting. The team agreed on a plan for how the facilitator could access and disseminate the necessary information.

Monitoring of implementation using *Problem-Solving Team Meeting Checklists data over time*. Rather than wait another school year to examine individual student level implementation issues, the SBLT and PS/RtI Coach agreed to meet in January of the following school year. A quick look at the results (not displayed here) indicated that 70% or greater of the components assessed by the checklist were observed for each domain. The team felt that these data were consistent with their perceptions of more fluidly engaging in problem-solving and agreed that the data represented progress. Furthermore, the team discussed that having an identified, trained facilitator and timekeeper at each meeting helped with implementation of the steps. Coordinating with staff ahead of time to have necessary data available to engage in problem-solving also appeared to help with implementation levels. Finally, SBLT members discussed remaining barriers to engaging in the process with higher levels of integrity and developed an action plan to address selected obstacles.

Problem-Solving Team Meeting Checklists Administration Summary

Problem-Solving Team Meeting Checklists – Initial & Follow-Up Versions Administration Summary

2009-10 School Year

This document is intended to provide you with a summary of the administration procedures for the *Problem-Solving Team Meeting Checklist – Initial & Follow-Up Versions* during the 2009-10 school year. Below you will find information on what levels of implementation the instruments assess, the methods used to assess implementation, how and when to complete the checklists, procedures for completing inter-rater agreement checks, and the dates that the checklists are due to the Project. Please contact Jose Castillo (castillo@coedu.usf.edu) with any questions or issues related to the completion of this checklists.

What is the purpose of these instruments?

- Assess implementation of a PS/RtI model at the individual student level. The *Initial Version* is intended to assess implementation of the first three steps of the problem solving process during individual student focused Problem Solving Team meetings. The *Follow-Up Version* is intended to assess implementation of the fourth step of the problem solving process during individual student focused Problem Solving Team meetings.
- Critical components of the problem solving process are used to determine how much of the process is being implemented and which components tend to relate to better student performance in schools

For which schools, content areas, and grade levels are these instruments completed?

- Completed for **pilot and comparison schools**
- **Content areas** assessed can include reading, math, and/or behavior. For Project purposes, PS/RtI coaches should complete this instrument for only those content areas being targeted by the pilot schools.
- **Grade levels** assessed can include K-5. For Project purposes, PS/RtI coaches should complete this instrument for only those grade levels being *targeted by the pilot schools whenever possible*.

What methods are used to complete these instruments?

- Observation is the primary method by which PS/RtI coaches complete these checklists.
- Coaches attend individual student focused Problem Solving Team (i.e., Child Study Team, Intervention Assistance Team, School-Based Intervention Team, Student Assistance Team) meetings. These meetings can include different compositions of school personnel as long as the purpose of the meeting is to focus on problem solving for individual students. This observation checklist should NOT be completed at meetings where more than one student is being problem-solved for the same issue (e.g., Tier I or II meetings).

How do I score these instruments?

- Each item is scored using a 2 point scale:
 - ♦ Absent
 - ♦ Present
- No scoring rubric accompanies these instruments. Because coaches complete the checklists in

real time during a meeting, they need to be able to make quick decisions about whether a critical component was present or absent. To help prepare coaches prior to meetings and review what each critical component assesses, a review of each item is provided below for both the *Initial* and *Follow-Up Versions*.

When are these instruments completed?

- **Initial Version:** This checklist is completed on one student referral per school. The student whose initial meeting is being observed should have been referred to the team for the first time.
- **Follow-Up Version:** This instrument should be completed on the same student selected for the *Initial Version* the first time s/he is brought back to the team for a follow-up meeting.

How many of these checklists do I complete?

- **Initial Version:** Only one of these checklists should be completed per school. This instrument should be completed during the first meeting where a student is discussed by the team.
- **Follow-Up Version:** This instrument should be completed the first time the student's (same student as was observed using the *Initial Version*) progress is discussed during a follow-up meeting. In other words, once one follow-up meeting is observed, coaches do NOT have to observe again if the student is brought back for another follow-up meeting.

How do we conduct inter-rater agreement for this checklist?

- Inter-rater agreement scoring procedures must be used during the first meeting that a coach completes both the *Initial* and *Follow-Up Versions* for one of his/her schools. In other words, the first time a coach completes the *Initial Version* and *Follow-Up Version* regardless of which student is being observed, inter-rater agreement procedures should be followed. If the coach and his/her inter-rater partner achieve 85% agreement, then the coach does not need to have a partner independently observe for the other schools. If the coach and his/her partner do NOT achieve 85% agreement, then the coach needs to have a partner observe at the next meeting(s) at which s/he completes a checklist until 85% agreement is reached.
- Coaches or RCs identified as the inter-rater partner should complete the checklists at the same meeting independently. Following independent scoring, coaches should use the *Problem Solving Team Meeting Checklist – Initial Version Inter-Rater Agreement Protocol* for the *Initial Version* of the checklist and the *Problem Solving Team Meeting Checklist – Follow-Up Version Inter-Rater Agreement Protocol* for the *Follow-Up Version*. These forms should be used to record agreements and disagreements for each item and calculate the overall percentage of agreement for both versions. This estimate will be used to determine if the 85% agreement criterion was reached to discontinue inter-rater agreement procedures.
- Coaches/RCs should then discuss any disagreements and attempt to come to consensus regarding how to score the item in the future when similar situations arise.

When are the checklists due to the Project?

- All *Initial* and *Follow-Up Version* protocols completed by the PS/RtI Coach during the year are due by **June 15, 2010**.

“Initial Version” Item Scoring Description

“Initial Version” Item Scoring Description

Personnel Present

Items 1-9 are meant to assess what personnel and roles are represented at the Problem-Solving Team Meetings. Because some of the personnel listed below may also serve as data coaches, facilitators, recorders, and/or timekeepers, one person at the meeting may result in present being checked for multiple items. However, to count an individual for more than one item, it must be clear to the coach that the individual is actually performing one of the four functions mentioned above in addition to his/her job title in the school.

1. **Administrator:** The Principal or Assistant Principal is present for the majority of the meeting.
2. **Classroom Teacher:** At least one classroom teacher is present for the majority of the meeting.
3. **Parent:** At least one parent is present for the majority of the meeting.
4. **Data Coach:** A person whose job it is to explain and/or address questions about data used is present for the majority of the meeting.
5. **Instructional Support:** A least one person is present who represents Instructional Support personnel (e.g., Reading Specialist/Coach, Title I teacher, Intervention teacher) for the majority of the meeting
6. **Special Education Teacher:** At least one special education teacher is present for the majority of the meeting.
7. **Facilitator:** A person whose role it is to facilitate the team’s progression through the problem solving process is present for the majority of the meeting.
8. **Recorder:** A person whose responsibility it is to write down the outcomes of the process is present for the majority of the meeting.
9. **Timekeeper:** A person whose responsibility it is to prompt participants at the meeting about how much time is left to problem solve is present for the majority of the meeting.

Problem Identification

10. **Replacement behavior(s) was identified:** Concrete, measurable target skill(s) was agreed upon by the team.
11. **Data were collected to determine the current level of performance for the replacement behavior:** Quantifiable data were presented to describe the student’s current performance of the target skill(s).
12. **Data were obtained for benchmark (i.e., expected) level(s) of performance:** Quantifiable data were presented to describe the expected level of performance for the student.
13. **Data were collected on the current level of peer performance or the data collected adequately represents average peer performance:** Quantifiable data were presented that adequately describe how the student’s peer group is performing on the target skill.
14. **A gap analysis between the student’s current level of performance and the benchmark, and the peers’ current level of performance (or adequate representation of peer performance) and the benchmark was conducted:** The difference between the (1) student’s performance and

the expected level of performance, and (2) peer group's performance and the expected level of performance on the target skill are quantified.

Problem Analysis

15. **Hypotheses were developed across multiple domains (e.g., curriculum, classroom, home/family, child, teacher, peers) or a functional analysis of behavior was completed:** Potential barriers to the student not meeting expectations were generated in at least 2 ICEL (Instruction, Curriculum, Environment, Learner (ICEL) domains or the results of a functional behavior analysis were presented.
16. **Hypotheses were developed to determine if the student was not performing the replacement behavior because of a performance and/or skill deficit:** While the problem was being analyzed, the team investigated whether the student was not meeting expectations because s/he did not possess the skill(s) or possessed the skill(s) but was not using it.
17. **Data were available or identified for collection to verify/nullify hypotheses:** Data were examined to determine the likelihood that reasons for the student not meeting expectations identified by the team were valid or a plan for collecting needed data was developed.
18. **At least one hypothesis was verified with data available at the meeting:** RIOT (Review, Interview, Observe Test) procedures were used to determine that at least one hypothesis suggested by the team was valid.

Intervention Development & Implementation

19. **Goals were clearly selected and related directly to benchmarks:** Concrete goals for student progress that were linked to the expected level of performance were developed by the team.
20. **Interventions were developed in areas for which data were available and hypotheses were verified:** An intervention plan (including who was responsible for doing what by when) was developed that addressed reasons confirmed during problem analysis to be barriers to the student not meeting expectations
21. **At least some discussion occurred about the use of evidence-based interventions:** Either a discussion of using evidence-based interventions occurred or the source of the interventions discussed was an organization that reviews research-based interventions (e.g, FCRR, What Works Clearinghouse)
22. **A plan for assessing intervention integrity was agreed upon:** What information would be collected to determine the degree to which the intervention plan was implemented as intended, who is responsible, and when the information would be collected was discussed during the meeting
23. **Frequency, focus and dates of progress monitoring were agreed upon:** A plan for monitoring student progress was developed including who was responsible, what data would be collected, and when the data would be collected.
24. **Criteria for positive response to intervention were agreed upon:** The amount of growth that the student would need to make to be considered good RtI was quantified by the team.
25. **An intervention support plan was developed (including actions to be taken, who is responsible, and when the actions will occur):** A plan to support the individuals responsible for implementing the intervention plan was developed by the team.
26. **A follow-up meeting was scheduled:** The date that the student will be discussed again by the team was scheduled.

“Follow-Up Version” Item Scoring Description

“Follow-Up Version” Item Description

Personnel Present

Items 1-9 are meant to assess what personnel and roles are represented at the Problem Solving Team Meetings. Because some of the personnel listed below may also serve as data coaches, facilitators, recorders, and/or timekeepers, one person at the meeting may result in present being checked for multiple items. However, to count an individual for more than one item, it must be clear to the coach that the individual is actually performing one of the four functions mentioned above in addition to his/her job title in the school.

1. **Administrator:** The Principal or Assistant Principal is present for the majority of the meeting.
2. **Classroom Teacher:** At least one classroom teacher is present for the majority of the meeting.
3. **Parent:** At least one parent is present for the majority of the meeting.
4. **Data Coach:** A person whose job it is to explain and/or address questions about data used is present for the majority of the meeting.
5. **Instructional Support:** A least one person is present who represents Instructional Support personnel (e.g., Reading Specialist/Coach, Title I teacher, Intervention teacher) for the majority of the meeting
6. **Special Education Teacher:** At least one special education teacher is present for the majority of the meeting.
7. **Facilitator:** A person whose role it is to facilitate the team’s progression through the problem solving process is present for the majority of the meeting.
8. **Recorder:** A person whose responsibility it is to write down the outcomes of the process is present for the majority of the meeting.
9. **Timekeeper:** A person whose responsibility it is to prompt participants at the meeting about how much time is left to problem solve is present for the majority of the meeting.

Program Evaluation/RtI

10. **Progress monitoring data were presented graphically:** A graph displaying the student’s RtI was presented at the meeting
11. **Documentation of implementation of the intervention plan was presented:** Records indicating the degree to which the intervention plan was implemented as intended was presented during the meeting.
12. **A decision regarding good, questionable, or poor RtI was made:** The team discussed and agreed upon the degree to which the student responded to the intervention.
13. **A decision to continue, modify, or terminate the intervention plan was made:** A clear decision was made to continue, alter, or end implementation of the intervention plan.
14. **A decision to continue, modify, or terminate the intervention support plan was made:** A clear decisions was agreed upon regarding whether to continue, alter, or end implementation of the support plan.
15. **A follow-up meeting was scheduled:** A date on which the team will discuss the student again was scheduled.

Blank Problem-Solving Team Meeting Checklist — Initial Version

Problem Solving/Response to Intervention Problem-Solving Team Checklist — Initial Version
 Developed by the Florida PS/RtI Statewide Project — <http://floridarti.usf.edu>

Problem-Solving Team Checklist – Initial Version

School Name: _____ Florida or District Student ID: _____

Date: _____ Concerns : Reading Math Behavior

Grade Level: _____

Directions: Prior to the Problem-Solving Team meeting, check whether each of the personnel identified in items 1-9 were present or absent. For items 10-26, please check whether the critical component of problem-solving/Response to Intervention was present or absent during the Problem-Solving Team meeting. This form should only be used for initial individual student focused problem-solving sessions.

| Critical Component | Present | Absent | Evidence/Notes |
|---|---------|--------|----------------|
| Personnel Present | | | |
| 1. Administrator | | | |
| 2. Classroom Teacher | | | |
| 3. Parent | | | |
| 4. Data Coach | | | |
| 5. Instructional Support (e.g., Reading Coach) | | | |
| 6. Special Education Teacher | | | |
| 7. Facilitator | | | |
| 8. Recorder (i.e., Notetaker) | | | |
| 9. Timekeeper | | | |
| Problem Identification | | | |
| 10. Replacement behavior(s) was identified | | | |
| 11. Data were collected to determine the current level of performance for the replacement behavior | | | |
| 12. Data were obtained for benchmark (i.e., expected) level(s) of performance | | | |
| 13. Data were collected on the current level of peer performance or the data collected adequately represents average peer performance | | | |
| 14. A gap analysis between the student's current level of performance and the benchmark, and the peers' current level of performance (or adequate representation of peer performance) and the benchmark was conducted | | | |
| Problem Analysis | | | |
| 15. Hypotheses were developed across multiple domains (e.g., curriculum, classroom, home/family, child, teacher, peers) or a functional analysis of behavior was completed | | | |

192 *Problem-Solving Team Meeting Checklists — Supplements*

Problem Solving/Response to Intervention Problem-Solving Team Checklist — Initial Version
 Developed by the Florida PS/RtI Statewide Project — <http://floridarti.usf.edu>

| Critical Component | Present | Absent | Evidence/Notes |
|---|---------|--------|----------------|
| 16. Hypotheses were developed to determine if the student was not performing the replacement behavior because of a performance and/or skill deficit | | | |
| 17. Data were available or identified for collection to verify/nullify hypotheses | | | |
| 18. At least one hypothesis was verified with data available at the meeting | | | |
| Intervention Development/Support | | | |
| 19. Goals were clearly selected and related directly to benchmarks | | | |
| 20. Interventions were developed in areas for which data were available and hypotheses were verified | | | |
| 21. At least some discussion occurred about the use of evidence-based interventions | | | |
| 22. A plan for assessing intervention integrity was agreed upon | | | |
| 23. Frequency, focus and dates of progress monitoring were agreed upon | | | |
| 24. Criteria for positive response to intervention were agreed upon | | | |
| 25. An intervention support plan was developed (including actions to be taken, who is responsible, and when the actions will occur) | | | |
| 26. A follow-up meeting was scheduled | | | |

Additional Comments:

Blank Problem-Solving Team Meeting Checklist — Follow-Up Version

Problem Solving/Response to Intervention Problem-Solving Team Checklist — Follow-Up Version
 Developed by the Florida PS/RtI Statewide Project — <http://floridarti.usf.edu>

Problem-Solving Team Checklist – Follow-Up Version

School Name: _____ Florida or District Student ID: _____

Date: _____

Directions: Prior to the Problem-Solving Team meeting, please indicate whether the personnel identified in items 1-9 were present or absent at the meeting. For items 10-15, please indicate whether the critical components of problem-solving/Response to Intervention identified was present or absent during the meeting. This form should only be used for individual student focused follow-up problem-solving sessions.

| Critical Component | Present | Absent | Evidence/Notes |
|---|---------|--------|----------------|
| Personnel Present | | | |
| 1. Administrator | | | |
| 2. Classroom Teacher | | | |
| 3. Parent | | | |
| 4. Data Coach | | | |
| 5. Instructional Support (e.g., Reading Coach) | | | |
| 6. Special Education Teacher | | | |
| 7. Facilitator | | | |
| 8. Recorder (i.e., Notetaker) | | | |
| 9. Timekeeper | | | |
| Program Evaluation/RtI | | | |
| 10. Progress monitoring data were presented graphically | | | |
| 11. Documentation of implementation of the intervention plan was presented | | | |
| 12. A decision regarding good, questionable, or poor RtI was made | | | |
| 13. A decision to continue, modify, or terminate the intervention plan was made | | | |
| 14. A decision to continue, modify, or terminate the intervention support plan was made | | | |
| 15. A follow-up meeting was scheduled | | | |

Additional Comments:

**Developed by the Florida PS/RtI Statewide Project
<http://floridarti.usf.edu>*