

excerpt from ***Appendix B*** of

a center report entitled:

**Organization Facilitators: A Change Agent for
Systematic School and Community Changes**

Appendix B

Initial Plan for the Organization Facilitator in Phasing Reforms

Phase 1. Organizing Resource Coordinating Teams at a School Site

Creation of a School-site *Resource Coordinating Team* provides a starting point in efforts to reform and restructure education support programs. Such a team not only can begin the process of transforming what already is available, it can help reach out to District and community resources to enhance enabling activity. Such a resource-oriented team differs from case-oriented teams (e.g., Student Study, Assistance, and Guidance Teams). The focus of this team is not on individual students. Rather, it is oriented to clarifying resources and how they are best used.

Such a team can help

- C improve coordination and efficacy by ensuring
 - >basic systems (for referral, triage, case management) are in place and effective
 - >programs/services are profiled, written up, and circulated
 - >resources are shared equitably
- C enhance resources through staff development and by facilitating creation of new resources via redeployment and outreach
- C evolve a site's enabling activity infrastructure by assisting in the creation of program teams and Family/Parent Centers as hubs for enabling activities.

Among its first functions, the Resource Coordinating Team can help clarify

- (a) the resources available to the school (who? what? when?) -- For example, the team can map out and then circulate a handout describing "Special Services, Programs, and Other Resources Available" to staff, students, and parents.
- (b) how someone gains access to available resources -- The team can clarify processes for referral, triage, follow-through, and case management, and circulate a description of procedures to the school staff and parents.
- (c) how resources are coordinated -- To ensure systems are in place and to enhance effectiveness, the team can help weave together existing resources, make analyses, coordinate activity, and so forth.
- (d) what other resources are needed by the school and what steps should be taken to acquire them -- The team can identify additional resources that might be acquired from the District or by establishing community linkages.

Toward the end of Phase 1, a *Complex Resource Coordinating Council* (a multi-locality council) can be organized. This group is designed to ensure sharing and enhancement of resources across schools in a given neighborhood. Of particular interest are ways to address common concerns related to crisis response and prevention, as well as dealing with the reality that community resources that might be linked to schools are extremely limited in many geographic areas and thus must be shared.

More info on the functions of a Resource Coordinating Team and the complex Council are provided at the end of this appendix.

Phase II. *Organizing a Programmatic Focus and Infrastructure for Enabling Activity*

All sites that indicate readiness for moving toward reconceptualizing education support (enabling) activity into a delimited set of program areas are assisted in organizing program teams and restructuring the site's Resource Coordinating Team.

This involves facilitating

- C development of program teams
- C analyses of enabling activity (programs/services) by program area teams to determine
 - >how well the various activities are coordinated/integrated (with a special emphasis on minimizing redundancy)
 - >whether any activities need to be improved (or eliminated)
 - >what is missing -- especially any activity that seems as important or even more important than those in operation.
- efforts by program area teams related to
 - >profiling, writing up, circulating, and publicizing program/service information
 - >setting priorities to improve activity in a programmatic area
 - >setting steps into motion to accomplish their first priority for improvement
 - >moving on to their next priorities.

Phase III. *Facilitating the Maintenance and Evolution of Appropriate Changes*

In general, this involves evaluating how well the infrastructure and related changes are working, including whether the changes are highly visible and understood. If there are problems, the focus is on clarifying what is structurally and systemically wrong and taking remedial steps. (It is important to avoid the trap of dealing with a symptom and ignoring ongoing factors that are producing problems; that is, the focus should be on addressing systemic flaws in ways that can prevent future problems.)

Examples of activity:

Checking on maintenance of Program Teams (keeping membership broadbased and with a working core through processes for identifying, recruiting, and training new members when teams need bolstering).

Holding individual meetings with school site leadership responsible for restructuring in this area and with team leaders to identify whether everyone is receiving adequate assistance and staff development.

Determining if teams periodically make a new listing (mapping) of the current activity at the site and whether they update their analyses of the activity.

Checking on efficacy of referral, triage, and case management systems.

Checking on the effectiveness of mechanisms for daily coordination, communication, and problem solving.

Evaluating progress in refining and enhancing program activity.

Phase IV. *Facilitating the Institutionalization of Appropriate Changes*

A critical aspect of institutionalization involves ensuring that school site staff responsible for restructuring enabling activity formulate a proposal for the next fiscal year. Such a proposal encompasses resource requests (budget, personnel, space, staff development time). It must be submitted and approved by the site's governance body. Institutionalization requires a plan that is appropriately endorsed and empowered through appropriation of adequate resources.

Institutionalization is further supported by evaluating functioning and outcomes related to new infrastructure mechanisms and fundamental enabling activities. With a view to improving quality and efficacy, the findings from such evaluations are used to revise activities and mechanisms as necessary.

Benchmark Checklist for Monitoring and Reviewing Restructuring Progress/Implementing an Enabling Component

The checklist on the following pages is designed to aid those involved in the process of restructuring education support programs and developing an Enabling Component.

The focus is on tasks related to

- organizing at a site
- establishing coordination among multiple sites in the same locale

This tool was developed as a formative evaluation instrument for use by Organization facilitators and/or other change agents. It aids in focusing problem solving discussions and planning next steps.

**Benchmark Checklist:
Restructuring Education Supports/Implementing an Enabling Component**

Site Name:	Date started	Date Completed if applies	Current Status
I. ORIENTATION: CREATING READINESS			
Initial contact made			
Indication of interest in establishing a component to address barriers to learning as a primary reform			
Initial meeting with district/site leaders.			
Negotiation of policy commitment and conditions for engagement. (e.g., Component adopted as a primary and essential component -- on a par with the instructional and management components)			
Identification of a site leader (equivalent to the leader for the Instructional Component). Name: Position:			
Identification of other leaders for the enabling Component. Name: Position:			
Distribution of <i>teacher</i> survey regarding attitudes about restructuring.			
Distribution of <i>administrator</i> survey regarding attitudes about restructuring.			
II. START-UP AND PHASE-IN			
Establishment of Temporary Mechanisms to facilitate development of the Enabling Component Steering Group members identified Name: Position:			
Change Team members identified Name: Position:			
Leadership training for all who will be taking a lead in developing the component.			

Site Name:	Date started	Date Completed if applies	Current Status
Development of phase-in plan.			
RESOURCE COORDINATING TEAM			
Identification of team members.			
Recruitment of team members. Name: Position:			
Initial team meeting.			
Training for team.			
MAPPING AND ANALYSIS OF EXISTING RESOURCES			
Mapping.			
Analysis (of needs, efficacy, coordination).			
Setting of priorities for enhancing enabling activity.			
Poster chart listing existing programs.			
Resource list development, circulation (to all staff), and posting (e.g., on a bulletin board) -- list all existing programs, services, and resources.			
INITIAL ENHANCEMENT OF SYSTEMS AND ACTIVITY RELATED TO ENABLING			
Analyze, improve, document, and circulate information on how to use current systems for Referral for Emergency Help-Major Services Triage Case Management Crisis Response (e.g., Crisis Team) (e.g., clarify steps, develop Flow charts, written descriptions, train personnel, etc.).			
Training for existing teams. Crisis Team Student and Family Assistance Team (e.g., Student Study or Guidance Team) Other (specify)			

Site Name:	Date started	Date Completed if applies	Current Status
DEVELOPMENT OF TEAMS FOR PROGRAM AREAS (e.g., clusters/curriculum of enabling activity)			
Establishment of Area Teams. Specify Areas:			
Training of Area Teams. Specify Areas:			
Area teams updating of mapping and analysis of resources. Specify Areas:			
Each program team formulates priority for enhancing activity in own area. Specify Areas:			
Priorities evaluated and ranked by Resource Coordinating Team and plans formulated for pursuing top priorities.			
If relevant, plans formulated to establish a Family and/or Parent Center.			
COMPONENT VISIBILITY, COMMUNICATION, AND PROBLEM SOLVING			
Steps taken to enhance visibility. (specify)			
Effective <i>communication mechanisms</i> in operation.			
Effective <i>problem solving mechanisms</i> in operation.			

Site Name:	Date started	Date Completed if applies	Current Status
OUTREACH			
To other resources in the district. (specify)			
To other schools in locale. (specify)			
To community programs and agencies. (specify)			
SYSTEM FOR QUALITY IMPROVEMENT			
Decisions about indicators to be used.			
Members recruited for Quality Improvement Team. Name: Position:			
Training of Quality Improvement Team			
Initial Quality Improvement recommendations. Made. Acted upon.			
III. INSTITUTIONALIZATION (maintenance & evolution) & IV. PLANS FOR ONGOING RENEWAL			
Indications of planning for maintenance. (specify)			
Strategies in use for maintaining momentum/progress. (List most prominent examples)			
Strategies in use for generating renewal. (List most prominent examples)			

Checklist for Establishing School-Site Collaborative Teams

1. ___ Job descriptions/evaluations reflect a policy for working in a coordinated and increasingly integrated way to maximize resource use and enhance effectiveness (this includes allocation of time and resources so that team members can build capacity and work effectively together to maximize resource coordination and enhancement).
2. ___ Every staff member is encouraged to participate on some team to improve students' classroom functioning and can choose teams whose work interests them.
3. ___ Teams include key stakeholders (current resource staff, special project staff, teachers, site administrators, parents, older students, others from the community, including representatives of school-linked community services).
4. ___ The size of teams reflects current needs, interests, and factors associated with efficient and effective functioning. (The larger the group, the harder it is to find a meeting time and the longer each meeting tends to run. Frequency of meetings depends on the group's functions, time availability, and ambitions. Properly designed and trained teams can accomplish a great deal through informal communication and short meetings).
5. ___ There is a core of team members who have or will acquire the ability to carry out identified functions and make the mechanism work (others are auxiliary members). All are committed to the team's mission. (Building team commitment and competence should be a major focus of school management policies and programs. Because several teams require the expertise of the same personnel, some individuals will necessarily be on more than one team.)
6. ___ Each team has a dedicated leader/facilitator who is able to keep the group task-focused and productive
7. ___ Each team has someone who records decisions and plans and reminds members of planned activity and products.
8. ___ Teams use advanced technology (management systems, electronic bulletin boards and E-mail, resource clearinghouses) to facilitate communication, networking, program planning and implementation, linking activity, and a variety of budgeting, scheduling, and other management concerns.