

**ACTION PLANNING WORKBOOK
FOR
I&RS PROGRAM DEVELOPMENT**

Building Name _____ **Date** _____

Team Member Names and Titles

Next Date the Plan is to be Reviewed and Updated _____

STEP 1: COMPLETE THE I&RS PROGRAM PLANNING CHECKLIST

1. Select a leader/facilitator, a record keeper and a timekeeper for the action planning activity.
2. Complete the *I&RS Program Planning Checklist* provided on pages 2 & 3. The checklist includes a variety of tasks to be completed and activities to be engaged in for the institutionalization and maintenance of the program. (The tasks and issues identified on the checklist, as well as on pages 117-127 of the Resource Manual, should be completed or addressed before a team becomes operational, i.e., accepts requests for assistance.)
3. Do not develop plans for addressing the items at this time. Only determine whether the tasks on the list are addressed by your team. Clarify the aims of the tasks and how they are fulfilled, as necessary. Limit discussion to:
 - *Clarifying questions to determine the meanings of the tasks;*
 - *Identifying how the items are fulfilled by your team; and*
 - *Reaching consensus on the appropriate responses.*
4. You will have an opportunity to identify tasks or issues that do not appear on the checklist in Step 2.

Step 1: I&RS Program Planning Checklist, continued

Complete the checklist on pages 2-3 below to identify the key elements that you will need to plan, develop or, particularly in the case of established teams, review. (Refer to pages 117-127 in the Resource Manual for more detail.)

Response Choices: **1) Yes, 2) Yes, but could be improved,
3) No, or 4) Don't Know**

_____ **Mission Statement** - Is there a *succinct* and *written* description of the I&RS program’s global *purpose*? Does the statement concisely describe: 1) who the team is, and 2) what the team does? Is it prominently and/or frequently displayed for all in the building and community to see?

_____ **I&RS Flow Chart** - Is there a building-based I&RS *flow chart* that provides a clear outline of the *board-approved* building-level I&RS procedures and gives sequential direction for proceeding through the I&RS process? Does the process include active parent involvement?

_____ **Roles** – Have roles and responsibilities been established for the following staff to aid in the development and implementation of the I&RS program and services: 1) building team members; 2) district staff; and 3) community members.

_____ **Information Flow** - Are there ongoing mechanisms for keeping board of education members, central office administrators, building administrators, staff and the community *informed* of I&RS team activities, accomplishments and needs?

_____ **School Policies and Procedures** - Does the team periodically review board-approved *policies and procedures* regarding I&RS and related functions; make recommendations for the inclusion of building-level I&RS and related functions, operating procedures and staff and community roles; and help the board of education keep them updated?

_____ **Meeting and Case Schedule** - Does the team establish a *meeting schedule*, as appropriate, at the beginning of each school year? Does the team determine a point in the school year when requests will no longer be accepted? Does the team establish a one- to two-month closeout period to transition existing cases and to prepare for next school year? Does the team allow two to three weeks to pass at the beginning of the school year before accepting requests for assistance?

_____ **Meeting Site** - Does the team have a secure, private and permanent *location* for meetings? Does the meeting room hold all I&RS and related forms, policies, procedures, state and federal statutes and regulations, relevant local ordinances, information on school and community resources, educational resources/strategies and a *locking file cabinet* for protecting student records, including completed I&RS forms and I&RS action plans?

Step 1: I&RS Program Planning Checklist, continued

_____ **I&RS Forms** - Has the team developed all *forms* that are necessary to implement the I&RS process? (Sample forms are provided in Appendix E of the Resource Manual.)

_____ **Community Linkages & Agreements** - Does the team or school establish *linkages* with community agencies, personal relationships with representatives of community agencies and maintain an up-to-date resource file? Are there written *agreements* with health and human service providers and juvenile officials that clearly identify procedures for initial contact, transportation, release of information, communication, educational services, discharge, continuity of care and general involvement in the I&RS process?

_____ **Professional Development Programs** - Is *support, guidance and professional development* provided for: 1) school staff who identify and request assistance for educational problems; as well as for 2) school staff who *participate in planning and providing* intervention and referral services?

_____ **Team Maintenance & Wellness** - Are *team maintenance meetings* regularly scheduled (e.g., at a minimum, one per six months) to improve team functioning, and address team members' relationships as they influence the I&RS process, rather than to explore student cases or develop program elements? Does the team engage in *wellness* activities, either as a component of their maintenance meetings or as separate health promotion functions? Does the team *celebrate* successes and actively support one another?

_____ **Service Organizations & Business & Industry** - Does the team identify, approach and develop relationships with these *resources*, as appropriate, to request their help in supporting I&RS program needs?

_____ **Other Educational & Supportive Resources** - Is the team proactive in anticipating potential needs and continuously seeking out relevant educational and other supportive resources for addressing existing conditions and resolving problems?

_____ **Program Development** - Does the team develop and implement, at a minimum, an annual *written plan* for the development of the building-based I&RS program that is based on a review of team data, activities, feedback and needs? Does the team annually make recommendations to the principal for improving school programs and services that is based on a review of I&RS action plans and the actions taken as a result of the building's I&RS system?

STEP 2: BRAINSTORM ADDITIONAL TASKS/ISSUES

1. *Brainstorm* a list of any other tasks that must be completed for your building's I&RS program to succeed. (If there are no additional tasks, continue to Step 3.)
2. The *record keeper* records all ideas from the brainstorming session. The group sets a time limit (e.g., five minutes) and the *timekeeper* monitors completion of the brainstorming session in the time period. The *leader/facilitator* moderates the brainstorming session while *strictly* adhering to the following rules:

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|---|---|
| ➤ <i>Identify as many ideas as possible.</i> | ➤ <i>Build upon and/or modify posted ideas.</i> |
| ➤ <i>Do not discuss, evaluate, judge or comment on ideas.</i> | ➤ <i>Post each idea for all to see.</i> |
| ➤ <i>Encourage creative and unique ideas, in addition to the traditional.</i> | ➤ <i>Adhere to the time limit.</i> |

3. Teams should not think of this list as a final inventory of tasks to be completed. Program planning and development is an *ongoing process* of review and improvement.

STEP 3: CLARIFY TASKS

1. Review and clarify the tasks from Step 1 and Step 2, as needed.
2. Consolidate items that are similar.

STEP 4: DEVELOP PLANS FOR ACTION

1. List in the left hand column, titled "Tasks," on the chart below:
 - All of the items from the checklist in Step 1 that received either a "no," "don't know," or a "yes, but could be improved" response; and
 - All of the items that were brainstormed in Step 2.
2. Complete the action planning details for each task.
 - **Action steps** = The specific steps to be undertaken to ensure that each of the tasks will be accomplished, rather than working on or completing each task now.
 - **Persons Responsible** = The names of the persons who will be responsible for each action step and the names of the persons who will monitor achievement.
 - **Completion Dates** = The specific date by which each action step will be completed.

TASKS	ACTION STEPS	PERSONS RESPONSIBLE	COMPLETION DATES

STEP 4: *Develop Plans for Action, continued*

TASKS	ACTION STEPS	PERSONS RESPONSIBLE	COMPLETION DATES

STEP 5: OBTAIN SUPPORT FOR THE I&RS PROGRAM

1. List all of the persons or groups in the school and the community who:
 - Must approve your activities;
 - Should be informed of the I&RS program; and
 - Can provide short-term and long-term help and support.

2. Complete the details in the columns below for each person or group.

NAMES & POSITIONS OF PERSONS OR GROUPS	WAYS TO OBTAIN THEIR HELP & SUPPORT	PERSONS RESPONSIBLE	COMPLETION DATES

STEP 6: BARRIERS TO I&RS TEAM SUCCESS

1. List the primary barriers that exist, concerns that you have or problems that you foresee in accomplishing each task that is listed in Step 1 and Step 2, or any other obstacles that you anticipate.
2. Generate strategies for preventing, managing or resolving the problems, barriers, concerns or obstacles.

PROBLEMS, BARRIERS, CONCERNS OR OBSTACLES	STRATEGIES

STEP 7: OTHER SUPPORT & RESOURCES

1. List other types of support or resources that your team will need to successfully develop the I&RS program. Consider both short- and long-term program needs.
2. Identify strategies to plan for or obtain the support or resources.

OTHER SUPPORT OR RESOURCES	STRATEGIES