



# Training in Instructional Consultation, Assessment and Teaming

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ICAT® Resources, LLC would like to thank you for your interest in Instructional Consultation Teams. This packet provides information about the IC Team model and the professional development services that are required for successful adoption and implementation of IC Teams. It is intended as a reference document used as part of an awareness session delivered by an ICAT Certified Trainer.

## IC Team Process

Instructional Consultation Teams represent a way for schools to organize and deliver services to support students and teachers. By restructuring and refocusing resources, students achieve academic and behavioral success within the general education environment; teachers assume the primary role of planning and accounting for student performance, and schools allocate resources through accountable decision-making procedures.

IC Teams (Rosenfield, & Gravois, 1996), is theoretically grounded in, and serves as a delivery system of, instructional consultation (Rosenfield, 1987; 2002) and instructional assessment (Gravois & Gickling, 2008). The model is based upon the premise that quality instruction matched to a student's assessed entry skills, increases student success, reduces behavioral difficulties, and avoids the need for special education evaluation and placement.

**IC Team Goal**

Enhance/ Improve/ Increase Student and Staff Performance

**Objectives**

- Develop a systematic support network within each building, including a trained IC Team Facilitator and a trained Instructional Consultation Team
- Enhance teachers' skills in and application of best practices of instructional assessment and delivery
- Develop school-wide norms of collaboration and problem-solving
- Utilize data for classroom and school decisions

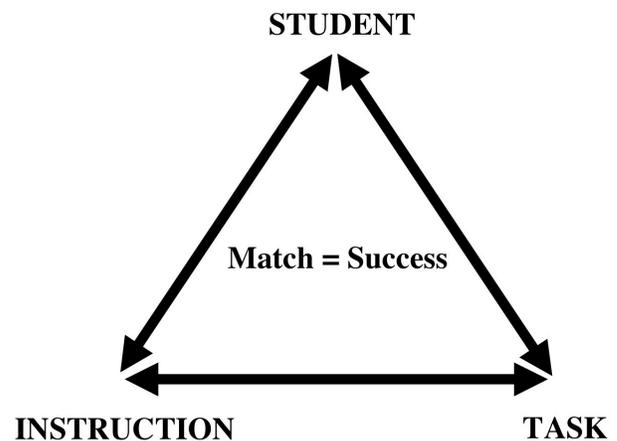
## Assumptions of IC Teams

There are two basic views of students who struggle as learners. The first, and a more traditional view, is that the struggling student has some internal deficit (i.e., disability) that prevents them from learning. This view results in efforts to distinguish the student as either being disabled or not disabled.

A second view, and that held by IC Teams, is that student-learning difficulties are a result of a mismatch between the student's entry skills and the instructional environment. This view promotes efforts to work with classroom teachers to assess student's entry skills and then find the appropriate match of instructional and curricula practices, first in the classroom and then if necessary with other supports being strategically offered and monitored.

The differences in these assumptions are not trivial. The assumptions about how students learn dictate how professional time is spent, and how resources are used within a school. Further, it is not easy to change an individual's assumptions about struggling students. Therefore, it is important to be explicit about the assumptions of IC Teams so that staff members can engage in dialogue about their views and beliefs, in an effort to promote deeper changes in practices. The basic assumptions of IC Teams are:

- All students learn
- Early intervention is preferable to waiting for failure
- The critical arena for intervention is the student-teacher relationship within the general education classroom
- The instructional match and setting is the focus of problem solving
- A problem-solving community is the foundation for professional and student learning
- Teachers, as professionals, are entitled to consult and collaborate
- Change is a process, not an event.



## IC Team Case Management

Teachers request assistance of the IC Team when they have a professional need for support and/or when student achievement is not meeting expectations. A trained team member (case manager) and the teacher engage in a systematic problem-solving process in which decisions are determined by the collection of specific student data. The IC Team case manager and teacher are guided by the critical assumptions of IC Teams as they progress through the problem-solving stages. These stages include:

- **Contracting.** Contracting sets the ground rules for collaboration between teacher and case manager and assures a commitment to work through the structured problem-solving process.

- **Problem Identification and Analysis.** The case manager and teacher collaborate in order to define the presenting concern so that it can be observed and measured within the classroom. Variables that influence student learning are assessed and analyzed with specific attention placed on ensuring the student is working in instructionally appropriate material within the classroom. Data is collected, baselines are established and specific, measurable goals are set.
- **Strategy Design.** The case manager, teacher and IC Team specifically plan researched-based strategies that will be used within the classroom setting by the teacher targeting the goals established. A concerted effort is made to develop strategies that can be maximized with multiple students or the entire class.
- **Strategy Implementation.** Since most difficulties in achieving goals are related to poor implementation of strategies, the case manager and teacher assess and assure that the strategy has been implemented with integrity within the classroom.
- **Strategy Evaluation.** The teacher and case manager assess, chart and analyze student data to determine progress toward established goals. If progress is not documented, problem solving continues. The case manager and teacher may review alternative strategies, re-visit the problem identification stage to ensure that the problem has been defined correctly, and bring the concern to the full team for further support and assistance.
- **Closure:** The case is considered complete when the student reaches the established goals *and* the classroom teacher is comfortable in continuing the strategy without assistance within their class. Closure of cases reflects the end of the collaborative relationship between the teacher and case manager until the teacher requests further assistance

## Staffing, Roles, and Functions

### IC Team Facilitator:

A half-time staff allocation (.5 FTE) is required to serve as the IC Team Facilitator for each school building. The developers recognize the sacrifice that schools and districts must make to allocate (or re-allocate) such significant level of resource. However, the IC Team Facilitator becomes the cornerstone for effective

implementation of IC Teams and effective use of resources in the building.

This individual receives advanced training and coaching in the instructional consultation and instructional assessment processes and then becomes the internal capacity to build and maintain the teams as a support system for students and teachers.

Specifically, the IC Team Facilitator:

- Helps initiate the IC Team process into the school
- Provides support to students by supporting classroom teachers
- Supports the on-going training and development of the IC Team
- Facilitates professional development for staff members

### Principal:

Without doubt, the Principal is critical to success with IC Teams. The Principal remains the instructional leader of the school and the legitimate authority to organize and direct resources within the building. While the Principal is not expected to train or lead the team (that's the IC Team Facilitator's Role) the principal is an active participant on the team. As a team member, the Principal develops the skills of instructional consultation and assessment and serves as a case manager. Specifically, the Principal:

- Participates in IC Team professional development
- Serves as a Case Manager for teachers who request assistance.
- Establishes a vision for objectively reviewing and aligning curriculum and instructional practices.
- Maintains Program Integrity

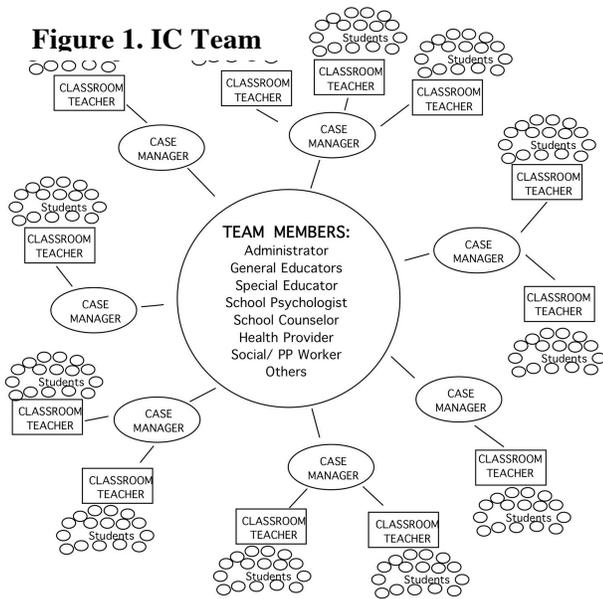
### IC Team:

The IC Team (Figure 1) is comprised of school-based resources, each receiving extensive training in the critical skills of instructional consultation and assessment. Team membership includes the Principal, IC Team Facilitator, resource specialists and general educators. General educators comprise a majority of the team membership.

The function of the IC Team is to:

- Provide Systematic Support to Teachers Utilizing an Instructional Consultation Case Management Model
- Provide an venue for on-going team member skill development
- Assist in aligning school resources for student and teacher support.

**Figure 1. IC Team**



**Training “Buddy”:**

Since the IC Team Facilitator begins their professional development in advance of the team, a staff-member from the school is designated to be a partner during this training phase. Having a “co-pilot” during this initial phase represents a support to the IC Team Facilitator (i.e., someone with whom to practice) and ultimately a lead team member. The Buddy:

- Participates in key Phase 1 training with Facilitator.
- Co-Facilitates team development and functioning
- Models case management and collaborative support
- Actively participates on the team

**Critical IC Team Skills**

Each team member, in order to achieve the goals of IC Teams, and to better confront existing assumptions about struggling students requires comfort and confidence in three primary skill areas:

- **Building Professional Relationships**  
Each team member enhances their effectiveness at using reflective and collaborative communication skills to develop and maintain professional, working relationships with teachers who have requested assistance.
- **Systematic Problem Solving**  
Each team member enhances their effectiveness at engaging in systematic problem solving that is data-driven and goal focused. The heart of IC Teams is the capacity of each team member to structure and guide the work between them and the teacher to maximize efficiency and effectiveness. Data collection and

analysis represent two sub-skills that each team member masters as part of their training in IC Teams.

- **Instructional and Behavioral Assessment**

Each team member enhances their effectiveness at using Instructional Assessment (IA; Gravois & Gickling, 2008) to assist teachers in identifying student’s entry skills. A firm grasp of student entry performance (i.e. prior knowledge) becomes the foundation of creating the instructional match within the classroom. In addition, strategic use of Behavioral Assessment supports those students that require behavioral strategies to achieve success within the classroom.

**IC Team Program Benefits and Research**

The developers and independent researchers have investigated the benefits of the IC Team model. The core components of IC Teams are derived from empirical studies and additional specific research has been conducted on the implementation and effectiveness of IC Teams as a comprehensive program of support.

After 20 years of positive findings, the United States Department of Education’s Institute of Educational Sciences (IES) awarded the University of Maryland a 4-year, \$1.8 million grant, to conduct an experimental study of the effectiveness of IC Teams on student and teacher performance. The study investigates the impact of IC Teams in 17 randomly selected schools compared with 17 randomly selected control schools in Prince William, VA.

To date, the following program benefits have been documented:

- Improves academic and behavioral achievement for students within the general education classroom (IDEA/NCLB) (Gravois & Rosenfield, 2002; Levinsohn, 2000; Ray, 2005; Silva, 2007)
- Provides a data-based academic intervention for at-risk students (IDEA/NCLB)
- Improves teachers skills in assessment and instructional strategies (Costas, Rosenfield & Gravois, 2003; Vu, et al., 2008)
- Maximizes resource utilization through coordinated and goal directed service delivery
- Recaptures resources by reducing inappropriate referrals (Gravois & Rosenfield, 2006)
- Reduces over identification and overrepresentation in special education (Gravois & Rosenfield, 2006; Silva, 2007)

## ICAT Phases and Objectives

The implementation of IC Teams occurs in three phases. First, the IC Team Facilitator is trained (Phase 1), then the IC Team is trained (Phase 2) and then the Facilitator, Team and Principal support the integration of the IC Team into existing school structures (Phase 3). Each phase of implementation strategically targets identified participants and has defined objectives (see Appendix A).

Phases should not be confused with “years”. As depicted in Figure 2, phases of implementation often overlap within the same year. Instead of measuring implementation by time involved, progress is instead measured by achievement of the stated objectives.

### ICAT Professional Development: Phase 1

Professional development of IC Teams is delivered through the ICAT Professional Development Process over a **two-year** period. The development plan is designed to provide the IC Team Facilitator and IC Team the necessary skills and knowledge to achieve high implementation. See Appendix B for a sample Phase 1 Training and Technical Support Calendar.

ICAT Phase 1 is focused primarily on developing the IC Team Facilitator’s skills and knowledge, prior to the full team training. The Principal and Training Buddy actively participate during this phase of training. This phase of professional development includes the following components:

#### I. ICAT Introductory Session (3 Days):

**Audience:** Principal/ IC Team Facilitator/ Training Buddy

A Level 6: ICAT Approved Trainer provides a three-day overview of IC Team components, skills and concepts along with an overview of the empirically based

principles and practices included within the IC Team process.

#### II. ICAT Coaching in Application

**Audience:** IC Team Facilitator

Each Facilitator is assigned an approved Level 3: ICAT On-line Coach following the introductory session. Facilitators return to school, secure a consultation case, audiotape and receive feedback from an individual coach via internet/ e-mail.

#### III. ICAT Skill Acquisition Sessions

**Audience:** Principal/ IC Team Facilitator/ Training Buddy

Skill sessions are scheduled once per month (on average) and are for two days. These sessions are held on-site in project schools. IC Team Facilitators, Principals and Buddies from various schools “converge” and meet in one project school. At each session, an ICAT Leader demonstrates skills with teachers and students, then additional students and teachers are used so that all participants have a chance to practice and receive feedback. Finally, participants are provided practice assignments that they complete upon return to their schools.

There are a total of seven skill acquisition sessions led by an Approved Level 5: ICAT Skill Session Leader. Sessions include:

##### Session 1:

Contracting, Problem Identification; Instructional Assessment in Reading and beginning use of the Student Documentation Form (SDF)

##### Session 2:

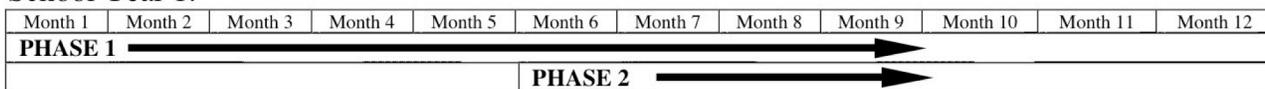
Problem Identification; Instructional Assessment in Reading, Reading Strategies; Use of the SDF.

##### Session 3:

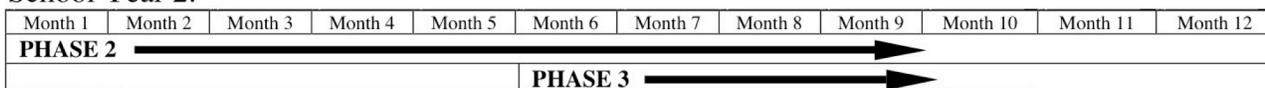
Instructional Assessment in Reading, Small Group Reading Strategies; Problem-Solving Process; Intervention Design & Evaluation; Use of SDF.

**Figure 2**

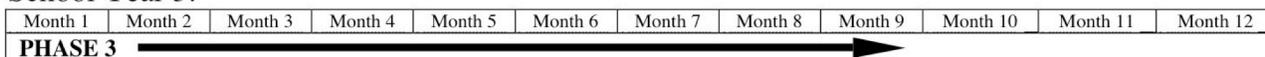
School Year 1:



School Year 2:



School Year 3:



**IC Team Facilitator Training:**

Understanding Professional Development; Facilitating Change in Schools; Planning, delivering and evaluating professional development; Organizational and Administrative Consultation

**Session 4:**

Team Facilitation; Writing Concerns; Instructional Assessment in Writing; Use of SDF.

**Session 5:**

Math Concerns; Instructional Assessment in Math; Use of SDF.

**Session 6:**

Behavioral Concerns; Functional Behavioral Assessment; Use of SDF.

**Session 7:**

Class wide Strategy/Assessment Applications

**IV. ICAT Technical Support****Audience:** IC Team Facilitator

In addition to the Skill Acquisition Sessions, and On-line Coaching there are a strategic number of technical support days in which participants receive additional feedback on their skill practice. One day of technical support is provided once per month (approximately), following a skill acquisition session. The technical support is offered to IC Team Facilitators, in smaller groups to assure individualized feedback. Each session is planned and led by an Approved Level 4: ICAT Technical Support Provider.

**ICAT Professional Development:  
Phase 2**

ICAT Phase 2 is focused upon developing the IC Team Members' skills and knowledge to function as Case Managers. It is the skill and knowledge that each Case Manager develops that allows effective support to teachers and students within the school.

However, team members require a period of professional development to effectively learn and apply the critical instructional consultation and assessment skills. The following Phase 2 activities are designed to support IC Team Members' skill development:

**I. ICAT Introductory Session (3 Days):**

**Audience:** IC Team Members (including Facilitator, Buddy and Principal)

A Level 6: ICAT Approved Trainer provides a three-day overview of IC Team components, skills and concepts along with an overview of the empirically based principles and practices included within the IC Team process.

**II. IC Team Weekly Team Meetings/ Training:**

**Audience:** IC Team Members (including Facilitator, Buddy and Principal)

The IC Team Facilitator plans and conducts weekly team meetings following the team's introductory session. An individualized "*IC Team Training and Implementation*" plan is developed for each school. The IC Team Facilitator, working in collaboration with the Principal and Buddy assesses team members' needs, plans and conducts the teams' professional development. Throughout, the IC Team Facilitator demonstrates, practices, provides feedbacks and supports team members as they develop the necessary skills to become Case Managers.

**III. ICAT Technical Support**

**Audience:** IC Team Facilitator

A limited number of strategic technical support days is provided to offer continued support to IC Team Facilitators develop their skills as team facilitators and to apply the IC Team process to class and school wide concerns. Each session is planned and led by an Approved Level 4: ICAT Technical Support Provider.

**ICAT Professional Development:  
Phase 3**

ICAT Phase 3 is focused upon assisting the school; the Principal, the IC Team Facilitator and IC Team members align and organize resources to sustain the IC Team process as the primary support to teachers and students. An approved ICAT Trainer provides initial leadership and guidance during Phase 3. However, the goal is for schools and districts to develop an on-going support network that can assure continued integrity of the process, as well as support continued development of relevant and critical skills.

**I. ICAT Networking**

**Audience:** IC Team Facilitator/ Principal

ICAT Networking represents a structured format for trained IC Team Facilitators and Principals of IC Team schools to strategically plan for the continued functioning of the IC Team. Networking serves as a venue to maintain integrity of the process across districts and buildings and allows IC Team Facilitators to continue their own skill development.

Initially, an Approved ICAT Trainer provides leadership by assessing participants needs, setting an agenda and providing direct training. However, as time progresses, participants assume a greater role in leading and maintaining the Networking structure.

## Implementing IC Teams

### Step 1: Make an Informed Decision

Initiation is the process leading up to the decision to proceed with a particular innovation. Emphasis in initiation of IC Teams is given to what Fullan (2007) refers to as the “three R’s:” relevance, readiness and resources.

#### Relevance

Relevance refers to the actions used to clarify and assess system needs in relation to the innovation being considered or proposed. Related to IC Teams, the following actions are recommended.

- *Self-Assessment.* Schools considering IC Teams should define and specify the outcomes they wish to achieve and then compare, contrast and assess how and in what ways does the adoption of IC Teams “fit” their intended outcomes.
- *Review publications.* Published resources can be accessed through libraries providing descriptions and information about IC Teams, training, research and implementation.
- *Attend awareness sessions.* Approved IC Team Trainers<sup>1</sup> and professionals from districts implementing IC Teams frequently present and are invited speakers at various professional conferences and associations. *These types of presentations are not considered skill development activities, and should not be confused with the decision to adopt or implement IC Teams.*

#### Readiness

Readiness refers to the actions taken to assess the capacity for change at the individual and organizational level. Readiness actions for IC Teams can include:

- *Conduct a Book Study.* The text *Instructional Consultation Teams: Collaborating for Change* (Rosenfield and Gravois, 1996) provides a comprehensive description of the model.
- *Contact those who are Implementing IC Teams.* ICAT Resources maintains a list of individuals and schools that have initiated and implemented IC Teams, and are willing to be contacted.
- *Contracted Readiness Training:* Prior to committing resources to the full implementation of the IC Team process, some districts elect to contract for strategic readiness training for a selected number of participants. Such readiness training may include Phase 1 activities.
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<sup>1</sup> Approved IC Team Trainers have received certification by ICAT Resources based upon demonstration of skills at seven specific levels of functioning.

#### Resources

Schools and districts must assess the commitment of resources, **both financial and personnel**, to carry out the implementation.

Several resource considerations that must be addressed prior to committing to implementing the IC Team model:

- *Commitment to Readiness.* Without adequate understanding of the IC Team model, there is very little chance of success in training and implementation.
- *Commitment of District Superintendent and Administration.* IC Teams requires a two-year commitment for implementation. The district superintendent, curriculum director, instructional director, special education director and participating Principals must all be informed and committed to the work involved.
- *Commitment to Allocate Personnel.* Personnel need to be identified to be the IC Team Facilitator. This position requires **a minimum of half-time allocation to each project school.** Many districts dedicate a full-time person to the IC Team Facilitator role.
- *Commitment to Provide Financial Support.* District will need to pay for the consulting and associated training costs to develop and deliver the two-year training and technical support of the IC Team model.
- *Commitment to Participating in Comprehensive Professional Development.* The IC Team Facilitator, the Principal of the school and another school-based staff member are required to attend training sessions, practice and apply skills and receive feedback. The IC Team Facilitator is expected to participate in approximately 26 days of training during the first year in addition to applying skills and knowledge within their assigned school.
- *Commitment to Program Evaluation.* Part of the IC Team program is a commitment to evaluate the program’s implementation and outcomes. Each school and district must commit to collecting required program evaluation and commit to on-going program evaluation beyond the initial training.

## Step 2: Make the Commitment

### District Commitments

- Identify designated number of schools to participate over a two-year period
- *Allocate personnel for IC Team Facilitator (minimum 1/2 time per school) to support the development and implementation of the team*
- Written commitment from superintendent and designated district contact
- Thoughtful selection of key personnel to receive advanced training as IC Team Facilitators
- Resources dedicated for:
  - External professional development (trainers and consultants)
  - Stipends/ Workshop wages for release and training of team members.
  - Travel costs for on-site training located at project schools (as appropriate)
- Commitment to participate in all IC Team Evaluation activities
- 3-5 year project commitment to resources for teaming and to assure continuity in school administration supportive of IC Team model.
- Negotiation of "hold harmless" for improved service delivery within IC Team project schools

### School/ Principal Commitment:

- Written commitment from principal
- Principal as active participant in training, team meetings and case management
- Team participation in designated training
- Representative team
- Weekly team meetings
- Classroom teachers as active team members
- Participation in IC Team evaluation activities
- 3-5 year school/ principal commitment

## Step 3: Commit to Share the Costs

Quality professional development has a cost. However, poor professional development has an even higher cost in the form of wasted time and money. Few districts have the capacity to support the comprehensive ICAT Professional Development Sequence described—*when working in isolation*.

However, when districts collaborate and join resources, the comprehensive professional development plan is affordable and can be adopted with integrity. ICAT Resources encourages multiple school buildings and districts to create an IC Team

Consortium. Such consortia require the registration of a Cohort of schools (minimum of 10 schools, and a maximum of 12), to commit to the two-year training sequence.

### IC Team Consortium

Districts within an IC Team Consortium commit to share training and technical support experiences. This requires districts' commitment to:

- working together for at least two years,
- a **single** yearlong training calendar (see for example Appendix B),
- travel to one another's' schools and training sites, and
- support each other in developing a shared set of skills and knowledge.

## Budget Considerations:

There are several budget considerations. Some are time-limited, designed to support professional development while others are long-term and require restructuring and re-allocation of resources.

### Personnel Considerations:

**Impact:** Ongoing, requires restructuring of resources  
1. On-site IC Team Facilitator (1/2 time per school)

#### Options:

- *Directly fund position*
- *Re-allocate existing resource position (i.e. Title I, reading specialist, mentor teacher, psychologist, special educator, etc.)*

### Professional Development Considerations:

**Impact:** Two years; decreases in 2nd year

1. Workshop wages/ stipends for team members to be trained (*only team members requiring release/ stipend*)

#### Options:

- *Special education funds for disproportionality/ early intervention*
- *Funding for at-risk/ low achieving populations*
- *Funding for targeted poverty/ No Child Left Behind*
- *Professional development funds*
- *Comprehensive Title I*

## 2. ICAT Professional Development

Year 1 ICAT Training costs include:

- 25-28 on-site training and technical support dates (includes cost of trainer, travel, lodging, etc.)
- Cost to provide semester of on-line coaching experience (*university credit may be available*)

Year 2 ICAT Training costs include:

- 8-10 on-site training and technical support dates (includes cost of trainer, travel, lodging, etc.)
- Cost for ICAT Tools, program evaluation and management system

## Supplies/ Material Considerations:

**Impact:** Cost per participant (est. \$40.00 per participant)

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## Appendix A: Phases and Objectives of IC Teams

**Phase 1:**  
 Development of IC Team Facilitator Skills in Instructional Assessment and Instructional Consultation and Identification of Potential Team Members

**TIMEFRAME:** Approximately 12 months

<b>Participant(s):</b>	<b>Phase 1 Objective:</b>	<b>Activities:</b>	<b>Indicator:</b>
IC Facilitator	Will develop and apply skills in Instructional Consultation case management and collaboration with classroom teacher	<ul style="list-style-type: none"> <li>• Solicit teacher for training case</li> <li>• Audiotape consultation sessions</li> <li>• Receive feedback via on-line coach</li> </ul>	Completion of structured on-line coaching experience with positive feedback via approved ICAT Coach and/or High implementation of collaboration as evidenced by LOI Scale.
IC Facilitator	Will develop and apply skills in instructional assessment with individual students	<ul style="list-style-type: none"> <li>• Attend on-site sessions</li> <li>• Practice and receive feedback</li> <li>• Complete assignments</li> </ul>	Accurate implementation of instructional assessment within instructional matched conditions via feedback of trainers
IC Facilitator & Principal	Will orient school and district staff to the IC Team program, components, roles and purpose	<ul style="list-style-type: none"> <li>• Schedule staff presentations</li> <li>• Generate newsletters, memos etc.</li> <li>• Provide demonstrations</li> </ul>	Staff members are <b>aware</b> of the IC Team program, goals and purpose
IC Facilitator & Principal	Will periodically share progress and celebrations of IC Team program with school and district staff	<ul style="list-style-type: none"> <li>• Schedule staff presentations</li> <li>• Generate newsletters, memos etc.</li> <li>• Provide demonstrations</li> </ul>	Staff members are <b>aware</b> of the IC Team program, goals and purpose
IC Facilitator	Will develop familiarity with instructional strategies and apply selected strategies with individual students & small groups of students	<ul style="list-style-type: none"> <li>• Attend on-site sessions</li> <li>• Practice and receive feedback</li> <li>• Complete assignments</li> </ul>	High implementation of instructional strategies following IA's under instructionally matched conditions via feedback of trainers.
IC Facilitator	Will demonstrate instructional assessment and strategies with staff, team members and students	<ul style="list-style-type: none"> <li>• Schedule and provide demonstration for staff</li> </ul>	Percent of staff members observing instructional assessment/strategies
IC Facilitator and Principal	Will identify and select potential team members to be trained in the IC & IA process	<ul style="list-style-type: none"> <li>• Scheduled meeting with Principal and Facilitator to generate team membership</li> </ul>	List of team members, consistent with IC Team membership requirements, submitted 2 months prior to scheduled team training

<b>Participant(s):</b>	<b>Phase 1 Objective:</b>	<b>Activities:</b>	<b>Indicator:</b>
IC Facilitator	Will demonstrate application of applying IC with writing, behavior, math cases	<ul style="list-style-type: none"> <li>• Attend on-site sessions</li> <li>• Schedule practice of IA with content specific cases</li> </ul>	<ul style="list-style-type: none"> <li>• High implementation of skill via feedback from trainer</li> <li>• Completion of scheduled demonstration</li> </ul>
IC Facilitator	Will plan and deliver 2-3 professional development activities with school staff centered on instructional assessment techniques and strategies	<ul style="list-style-type: none"> <li>• Schedule and demonstrate instructional assessment and strategies with school staff</li> </ul>	<ul style="list-style-type: none"> <li>• Completion of 2-3 scheduled demonstrations</li> </ul>
IC Facilitator	Will develop and apply skills in documenting student progress utilizing the IC Student Documentation Form (SDF).	<ul style="list-style-type: none"> <li>• Participate in on-line coaching</li> <li>• Attend on-site sessions</li> <li>• Complete case-related SDFs</li> </ul>	<ul style="list-style-type: none"> <li>• Completed SDF for online coaching case</li> <li>• High levels of accuracy of SDF completion as measured by SDF Review Form</li> </ul>
IC Facilitator	Will develop skills in team facilitation	<ul style="list-style-type: none"> <li>• Attend IC Team Facilitator Training</li> </ul>	<ul style="list-style-type: none"> <li>• Developed draft schedule of training</li> <li>• Developed 2-3 training plans for team meetings</li> <li>• Model/ demonstrate skills within the IC Team training for team members</li> </ul>
IC Facilitator and Principal	Will establish IC Team meeting times for upcoming year	<ul style="list-style-type: none"> <li>• Scheduled meeting with Principal and Facilitator to place IC Team meeting on master calendar</li> </ul>	<ul style="list-style-type: none"> <li>• IC Team meeting appears on schools' master calendar (no later than March for subsequent year)</li> </ul>

### **ICAT Resources Training & Technical Support Activities:**

- Overview training for IC Team Facilitators, Principal and key staff
- On-line coaching for facilitator in application of IC and IA within case
- Scheduled on-site skill acquisition training and network sessions to develop Facilitators' skills (reading, writing, math, behavior, class wide)
- Follow-up on-site Technical Support for IC Team Facilitator to practice and apply skills
- IC Team Facilitation training for IC Team Facilitator

**Phase 2:**  
 Development and Implementation of the IC Team in  
 Instructional Assessment and Instructional Consultation

**TIMEFRAME:** Begins middle of first year and overlaps with ending objectives of Phase 1.  
 Phase 2 is accomplished in approximately one school year.

<b>Participant(s):</b>	<b>Phase 2 Objectives:</b>	<b>Activities:</b>	<b>Indicator:</b>
IC Facilitator	Will demonstrate application of class wide instructional assessment techniques and practices	<ul style="list-style-type: none"> <li>• Attend on-site sessions</li> <li>• Schedule practice of class wide application in teachers' class</li> </ul>	<ul style="list-style-type: none"> <li>• High implementation of skill via feedback from trainer</li> <li>• Completion of scheduled demonstration</li> </ul>
IC Facilitator & Team	Fully implement the collaborative teaming model including: <ul style="list-style-type: none"> <li>• Plan and conduct regular team meetings</li> <li>• Follow a structured team agenda</li> </ul>	<ul style="list-style-type: none"> <li>• Weekly scheduled team meetings</li> <li>• Follow structured team agenda</li> <li>• Facilitator develops and delivers training as appropriate within team meeting</li> </ul>	<ul style="list-style-type: none"> <li>• Weekly team agendas</li> <li>• High degree of program implementation as measured by the IC Team Level of Implementation Scale</li> <li>• Up-to-date Systems Tracking Form</li> </ul>
IC Facilitator & Team	Increase staff and teachers comfort and use of the IC Team process	<ul style="list-style-type: none"> <li>• Take and conduct effective IC Cases</li> </ul>	<ul style="list-style-type: none"> <li>• Percent of teachers who request and receive assistance</li> <li>• High degree of program implementation as measured by the IC Team Level of Implementation Scale</li> </ul>
IC Facilitator, Team & Principal	Will periodically update school and district staff of progress and celebrations	<ul style="list-style-type: none"> <li>• Schedule staff presentations</li> <li>• Generate newsletters, memos etc.</li> <li>• Provide demonstrations</li> </ul>	<ul style="list-style-type: none"> <li>• Staff members increase <b>understanding</b> of the IC Team program, goals and purpose</li> </ul>
Team members	Will develop and apply skills in instructional assessment with individual students	<ul style="list-style-type: none"> <li>• Attend team trainings conducted by IC Facilitator</li> <li>• Practice skills and receive feedback</li> <li>• Complete assignments</li> </ul>	Accurate implementation of instructional assessment under instructionally matched conditions via feedback from trainers.
IC Team Members	Will apply the Instructional Assessment and Instructional Consultation processes as part of their case management	<ul style="list-style-type: none"> <li>• Solicit a training case and apply IC and instructional assessment within case</li> </ul>	<ul style="list-style-type: none"> <li>• High degree of program implementation as measured by the IC Team Level of Implementation Scale</li> </ul>

<b>Participant(s):</b>	<b>Phase 2 Objectives:</b>	<b>Activities:</b>	<b>Indicator:</b>
IC Team Members	Will take and manage an IC case	<ul style="list-style-type: none"> <li>• Solicit a training case and apply IC and instructional assessment within case</li> </ul>	<ul style="list-style-type: none"> <li>• Progress on Systems Tracking Form</li> <li>• Percent of team members with cases that reach Intervention Implementation/ Evaluation stage</li> </ul>
IC Facilitator, Team Members & Principal	Ensure and increase teachers' involvement in the instructional assessment and consultation process.	<ul style="list-style-type: none"> <li>• Conduct instructional assessment with teacher present</li> <li>• Apply IC skills within cases</li> </ul>	<ul style="list-style-type: none"> <li>• High degree of program implementation as measured by the IC Team Level of Implementation Scale</li> </ul>
IC Team Members	Will develop and apply skills in documenting student progress utilizing the IC SDF form.	<ul style="list-style-type: none"> <li>• Complete practice case with coaching from IC Facilitator</li> <li>• Attend on-site sessions</li> <li>• Complete case-related SDFs</li> </ul>	<ul style="list-style-type: none"> <li>• Completed SDF for practice case</li> <li>• High levels of accuracy of SDF completion as measured by SDF Review Form</li> </ul>

### **ICAT Resources Training & Technical Support Activities:**

- Introductory session for IC Teams
- Development of training and implementation plan for each school
- Development of Team Schedule of Training & Implementation
- Scheduled on-site skill acquisition training and network sessions to develop Facilitators' skills
- Follow-up, on-site Technical Support Sessions for IC Team Facilitator & Team to practice and apply skills
- Program evaluation support through school registration with ICAT Tools.

**Phase 3:**  
Continued Implementation and Institutionalization of IC Team Program

**TIMEFRAME :** Begins in Year 2 and overlaps with Phase 2 Objectives.

<b>Participant(s):</b>	<b>Phase 3 Objectives:</b>	<b>Activities:</b>	<b>Indicator:</b>
IC Facilitator, Team Members and Principal	Establish an evaluation plan, including: <ul style="list-style-type: none"> <li>• data on patterns of requests for assistance (by grade, type of concern, etc.)</li> <li>• data on case attainment of goals</li> <li>• data on teacher/ staff satisfaction with the IC Team program assessment of staff needs</li> </ul>	<ul style="list-style-type: none"> <li>• Organize and complete IC Team data collection</li> <li>• Complete data collection within timeframe specified</li> </ul>	<ul style="list-style-type: none"> <li>• Data collected, organized and submitted by due date(s)</li> </ul>
IC Facilitator & Team Members	Establish annual team goals based upon evaluation results	<ul style="list-style-type: none"> <li>• Meet and review end-of -year IC Team program data</li> <li>• Write annual goals</li> </ul>	<ul style="list-style-type: none"> <li>• Written team goals</li> </ul>
IC Facilitator, Principal, & Team Members	Establish goals and plans for aligning existing structures and resources (i.e. PST/SST/EMT process aligned with IC Team).	<ul style="list-style-type: none"> <li>• Assess staff use and participation with IC Team</li> <li>• Consult with relevant district/ state administrators to align mandated functions</li> <li>• Inform and involve staff in alignment of IC Team with existing resources</li> </ul>	<ul style="list-style-type: none"> <li>• Staff members can articulate alignment of IC Team with existing school structures and resources</li> <li>• Written description of IC Team as part of school plan</li> </ul>
IC Facilitator, Principal, & Team Members	Recruit and train new team members	<ul style="list-style-type: none"> <li>• Solicit and recruit new team members</li> <li>• Submit team members' names to attend scheduled Introductory Training</li> </ul>	<ul style="list-style-type: none"> <li>• Documentation of activities to recruit new team members</li> <li>• Submit names of new team members to attend Introductory training 2 months prior to training</li> </ul>
IC Facilitator & Team	Achieve high use of staff and teachers use of the IC Team process	<ul style="list-style-type: none"> <li>• Take and conduct effective IC Cases</li> </ul>	<ul style="list-style-type: none"> <li>• 67% or greater of teachers request and receive assistance</li> <li>• High degree of program implementation as measured by the IC Team Level of Implementation Scale</li> </ul>

<b>Participant(s):</b>	<b>Phase 3 Objectives:</b>	<b>Activities:</b>	<b>Indicator:</b>
IC Facilitator & Team Members	Develop and implement a plan to integrate new members into team functioning	<ul style="list-style-type: none"> <li>• Plan as part of weekly team meetings to support new team members</li> <li>• “Buddy System” to support new team members</li> <li>• Organize new members first case as a “training case”</li> </ul>	<ul style="list-style-type: none"> <li>• Team training plans are differentiated to accommodate new team members’ entry-level skills</li> <li>• Percent of new team members who successfully take and manage a case</li> </ul>
IC Facilitator	Increase in-class demonstration of instructional strategies	<ul style="list-style-type: none"> <li>• Schedule and demonstrate strategies using the “I Do, We Do, You Do” model</li> </ul>	<ul style="list-style-type: none"> <li>• Percent of staff members who participate in the 3-D process</li> </ul>
IC Facilitator	Increase professional development for staff targeting identified student and teacher needs.	<ul style="list-style-type: none"> <li>• Conduct needs assessments of teachers</li> <li>• Review IC case data to determine needs of staff</li> <li>• Coordinate/ plan, and when appropriate, conduct professional development</li> </ul>	<ul style="list-style-type: none"> <li>• Results of needs assessments</li> <li>• Professional Development Plans that integrate Levels of Impact (awareness, understanding, skill and application)</li> </ul>
IC Facilitator	Increase dissemination of IC Team practices and outcomes to staff, district administrators and policymakers.	<ul style="list-style-type: none"> <li>• Summarize and organize end-of-year evaluation data</li> <li>• Schedule meeting with Principal to determine which district administrators to share information with</li> <li>• Follow district policies for dissemination data</li> </ul>	<ul style="list-style-type: none"> <li>• Agendas from district meetings with IC Team as topic</li> <li>• Summaries of presentations to district administration</li> </ul>

### **ICAT Resources Training & Technical Support Activities:**

- Consultation with District and Selected lead IC Facilitators (available)
- As appropriate, scheduled training and networking sessions to develop IC Team Facilitators’ & Team members’ skills (available)
- Individualized support of individuals developing evidence for Approved IC Team Trainer (additional agreements required).
- Program evaluation support through school registration with ICAT Tools.

**Appendix B: Sample Year 1 (Phase 1 & 2) Training and Technical Support Schedule**

DATE	LOCATION	TOPIC	Materials/ Info to Bring	Participants
				COHORT 1 (# Schools)
Summer 3-4 Days	Central Training Location	Introductory IC Team Training	IC Team Introductory Manual	Principal IC Team Facilitator Team “Buddy” District Liaison
<i>Semester following Introductory Session</i>	<i>N/A</i>	On-line Coaching of Facilitators begins	<i>IC Team Facilitator * Coaches are assigned to facilitators following Introductory Session. Weekly application and coaching is required</i>	
September 2 days	In schools with access to students and teachers	Session I: A Instructional Assessment in Reading B. Problem solving Process: Contracting (Practice Assignment)	Case material/ Students Available for Practice	Principal (day 1) IC Team Facilitator Team “Buddy”
<i>Sept./ Oct 1 day</i>	<i>Scheduled by district/ schools (clustered)</i>	On-site/ Individualized Support	<i>All case materials</i>	<i>IC Team Facilitator Buddy (invited)</i>
October 2 days	In schools with access to students and teachers	Session 2: A. Instructional Assessment in Reading B. Reading/Strategies C. Problem Solving Process: Problem Identification D. SDF (Introduction) (Practice Assignment)	All manuals/ case materials Students Available for Practice	Principal (day 1) IC Team Facilitator Team “Buddy”
<i>Oct/Nov 1 day</i>	<i>Scheduled by district/ schools (clustered)</i>	On-site/ Individualized Support	<i>All case materials</i>	<i>IC Team Facilitator Buddy (invited)</i>
December 2 Days	In schools with access to students and teachers	Session 3: A. Student Documentation Form B. Case reviews/ Problem Solving C. Small group strategies D. Problem Solving Process: Intervention Design & Evaluation (Practice Assignment)	All manuals/ case materials Students Available for Practice	Principal (day 1) IC Team Facilitator Team “Buddy”
<i>Dec/Jan 1 day</i>	<i>Scheduled by district/ schools (clustered)</i>	On-site/ Individualized Support	<i>All case materials</i>	<i>IC Team Facilitator</i>

DATE	LOCATION	TOPIC	Materials/ Info to Bring	Participants
				COHORT 1 (# Schools)
				<i>Buddy (invited)</i>
January 2 days	Central Training Location	IC Team Facilitator Training		IC Team Facilitator Buddy (invited) Principal (invited)
January/ February 3 days	Central Training Location	Introductory IC Team Training		Principal IC Team Facilitator Team Members
February 2 days	In schools with access to students and teachers	Session 4: A. Team Facilitation B. Problem Solving Process: Writing Concerns C. Writing Assessment D. Student Documentation Form (Practice Assignment)	All manuals/ Case Materials/ Students available for practice	Principal (day 1) IC Team Facilitator Team “Buddy”
<i>Feb/ March 1 day</i>	<i>Scheduled by district/ schools (clustered)</i>	On-site/ Individualized Support	<i>All case materials</i>	<i>IC Team Facilitator Buddy (invited)</i>
March 2 days	In schools with access to students and teachers	Session 5: A Case Reviews B. Problem Solving Process: Math Concerns C. Math Assessment D. SDF (Practice Assignment)	All Case Materials	Principal (day 1) IC Team Facilitator Team “Buddy”
<i>March/April 1 day</i>	<i>Scheduled by district/ schools (clustered)</i>	On-site/ Individualized Support	<i>All case materials</i>	<i>IC Team Facilitator Buddy (invited)</i>
April 2 days	In schools with access to students and teachers	Session 6: A Case Reviews B. Problem Solving Process: Behavioral Concerns C. Behavioral Assessment D. SDF (Practice Assignment)	Manual and Student Math Samples/ case materials	Principal (day 1) IC Team Facilitator Team “Buddy”
May 1 day	Central Training Location	Network/ Evaluation completion/ End of Year Planning	all materials/ Tracking	Principal IC Team Facilitator Team “Buddy” District Liaison