



*adopt, adapt, invent...*

# *Guidelines for Selecting Alternatives*

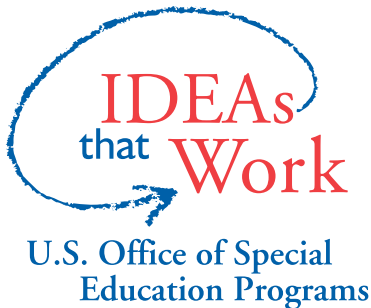
*to Overreliance on Paraprofessionals*

*Version 1.0*

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March 2003



_____ Name of School, City/Town, State		
_____ Name of Administrator Responsible for Plan		
_____	_____	_____
phone	fax	email

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[www.uvm.edu/~cdci/evolve/](http://www.uvm.edu/~cdci/evolve/)



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Thanks are extended to the school-based planing teams who assisted in field-testing this guide.

## General Directions & Tips

- This guide is meant to be used as a workbook. Please write in it (*we suggest pencil*), add to it, or change the wording. Feel free to adapt it in ways that make sense to your team. In other words, *make it your own!*
- Teams often find that it works best to *meet regularly* to get things accomplished. If there is too much time between meetings, things tend to get bogged down.
- Some teams have found it helpful to *get input from people* beyond their planning team. They have gathered peoples' perspectives in a variety of ways such as, talking to people directly, by email, or through questionnaires. Example questionnaires are available on line at [www.uvm.edu/~cdci/evolve/surveys.html](http://www.uvm.edu/~cdci/evolve/surveys.html)
- While each team member may have copies of this guide book to refer to, we suggest you *maintain a master version* of this guide book to record the activities and work of your team.
- At your meetings, *practice collaborative teamwork* principles by establishing an agenda and rotating roles (e.g., facilitator, recorder, time keeper), establishing interaction norms, and processing on the effectiveness of your interactions. *Record meeting minutes* that capture details beyond what is recorded in this booklet.
- It can also be helpful to *display information and ideas publicly* on large chart paper or on overhead transparencies made from the forms in this guide book. This can help focus the work of the group.
- In order for your screening and self-assessment to be reflective and honest, *teams need to be able to be self-critical without the fear* that the information they record for their planning purposes (and ultimately for school improvement) might inappropriately be used against them. Our experience with other schools suggests that often it is the healthiest and most advanced schools that are the most self-critical. Avoid the temptation of comparing the self-ratings of one school to another; such comparisons are of little value and potentially harmful.



## *Introduction to these Guidelines...*

These guidelines serve two primary purposes. First, the *screening* tool (Step 2) is designed to assist schools in determining if they are overreliant on paraprofessionals to educate students with disabilities within general education activities and whether they are utilizing them inappropriately. Secondly, if a school determines that it does have problems with overreliance or inappropriate utilization, these guidelines provide a series of additional steps to assist school-based teams. The remaining steps help schools *assess their situation to develop, implement, and evaluate plans* to support the education of students with disabilities. Options are based on adopting, adapting, or inventing alternatives to paraprofessional supports. Although these guidelines seem to focus on paraprofessional supports, they are actually much less about paraprofessionals and more about school, teacher, and special educator supports. These guidelines rely on paraprofessional supports as an indicator of the overall health of educational supports and as a doorway to examine these other issues and subsequently make improvements.

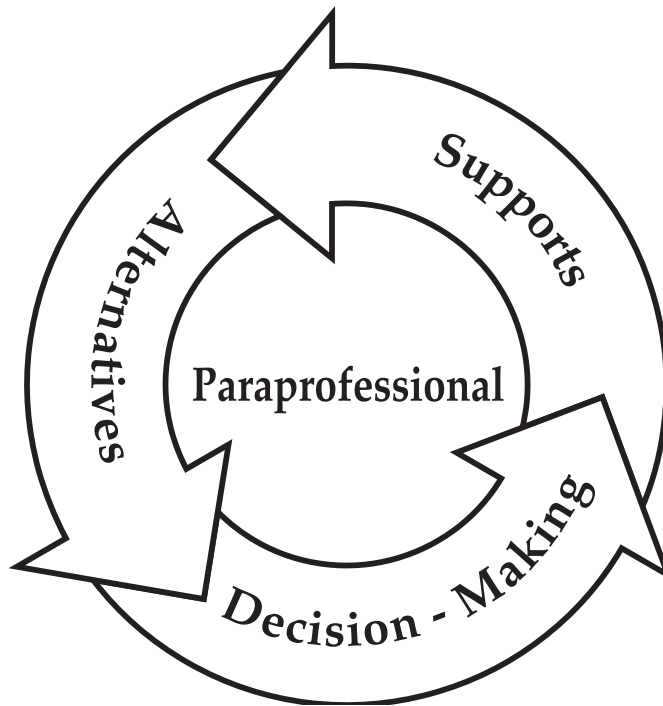
The rationale for pursuing alternatives, rather than merely strengthening existing paraprofessional supports (particularly those that are instructional), is grounded in the belief that students with disabilities need and deserve access to qualified teachers, special educators, and related services providers within the context of general education classes and other integrated environments (Brown et al. , 1999), as well as natural supports from peers. Although there will continue to be a valued role for paraprofessionals assisting in the provision of special education, the current state-of-the art, namely relying heavily on paraprofessionals to provide instruction to students with disabilities, represents a double-standard that likely would be considered unacceptable if applied to students without disabilities. Seemingly obvious solutions such as training paraprofessionals more extensively or compensating them better actually represent a conundrum. Table 1, on the next page, provides information from a brief article describing this puzzling aspect of service delivery. The entire article is available online at the Project EVOLVE web site, [www.uvm.edu/~cdci/evolve/conundrum.html](http://www.uvm.edu/~cdci/evolve/conundrum.html)

Table 1 The Paraprofessional Conundrum

Asked to Implement Teacher-Type Instructional Roles	Trained/Supported to Implement Teacher-Type Instructional Roles	Paid Commensurate with Teacher-Type Instructional Roles	<i>Result</i>
1. <b>YES</b> +	<b>YES</b> +	<b>NO</b> =	<b>Ambivalence</b> Paraprofessionals report feeling taken advantage of when asked to do teacher-type work for low pay.
2. <b>YES</b> +	<b>NO</b> +	<b>NO</b> =	<b>Inconsistent with the IDEA</b> IDEA requires training and supervision of paraprofessionals; without it the likelihood of inadequate instruction increases. <i>Ambivalence</i>
3. <b>NO</b> +	<b>NO</b> +	<b>NO</b> =	<b>Disrespect</b> Paraprofessionals feel disrespected if their abilities are not utilized, resulting in low morale and high turnover. <i>Inconsistent with the IDEA</i>
4. <b>NO</b> +	<b>YES</b> +	<b>NO</b> =	<b>Frustration</b> If paraprofessionals are trained (e.g., some are certified teachers), they report feeling frustrated if they are not expected to do higher-level tasks. <i>Ambivalence</i>
5. <b>YES</b> +	<b>YES/NO</b> +	<b>YES</b> =	<b>Ineffective Budgeting of Resources</b> Schools do not want to pay higher wages unless employees are engaging in higher-level roles.
6. <b>YES</b> +	<b>YES</b> +	<b>YES</b> =	<b>Questionable Personnel Use</b> Why hire paraprofessionals at, or near, teacher wages when schools could hire qualified professionals instead?

Pursuing alternatives is one of a trio of interrelated activities schools should consider in providing appropriate educational supports for students with disabilities. Although these guidelines focus on **alternatives**, it is important to be aware of the other two sets of activities, neither of which are addressed in these guidelines, but are elsewhere. First, schools might avoid becoming overreliant on paraprofessionals by engaging in careful **decision-making** about when paraprofessional supports are appropriate. There is not much literature on this topic (Giangreco, Broer & Edelman, 1999; Mueller & Murphy, 2001) and virtually no research . Secondly, schools should attend to the personnel training and supervision requirements for paraprofessionals included in the IDEA and other exemplary practices to provide appropriate **supports** for paraprofessionals who are, or will be, working with students who have disabilities. These supports include categories such as orientation, training, role clarification, acknowledgments/respect, and supervision. A substantial set of literature is available on these and related topics, including some (mostly descriptive) research. For recent summaries of the literature see, Giangreco, Edelman, Broer & Doyle (2001) or Giangreco & Doyle (2002). For continually updated citations and summaries visit the web site:

<http://www.uvm.edu/~cdci/parasupport/>  
and click on the link labeled "Chronological Listing"



The process and content embedded in these guidelines are a hybrid drawn from a variety of sources. The specific items in *Screening* (Step 2) and *Self-Assessment* (Step 5) are research-based, derived from a series of six interrelated research studies on paraprofessionals in inclusive schools (Giangreco, Broer & Edelman, 2001, 2002a, 2002b; Giangreco, Edelman & Broer, in press, 2001; Giangreco, Edelman, Luiselli & MacFarland, 1997). The overall planning tool is based on aspects of the sources listed below.

### ***PROCESS SOURCES***

- *Collaborative Teamwork* (e.g., diverse membership, face-to-face interactions, developing a shared framework, pursuing common goals, establishing a process for interactions)  
(Friend & Cook, 2002; Idol, Nevin & Paolucci-Whitcomb, 1993; Lee, 1999; Rainforth & York-Barr, 1997; Thousand & Villa, 2000)
- *Osborn-Parnes Creative Problem-Solving* (e.g., divergent-convergent process steps, deferring judgment, problem-clarification, fact-finding, use of idea-joggers to generate ideas, incubation times, action-planning)  
(Giangreco, Cloninger, Dennis & Edelman, 2002; Osborn, 1993; Parnes, 1988, 1992, 1997; Thousand, Villa & Nevin, 2002)
- *Critical Friend Support* (e.g., identifying a respected "outsider" to learn about the inside characteristics of the school, ask challenging questions, and offer feedback and ideas throughout the process)  
(Jorgensen, 1998; Olson, 1994, 1998)
- *Logic Models* (e.g., "Chains of Reasoning" used to evaluate the relationship between actions taken by the team and outcomes, ultimately for students)  
(McLaughlin & Jordan, 1999; Millar, Simeone & Carnevale, 2001)

### ***CONTENT SOURCES***

- *Review of Literature & Research on Inclusive Education & School Restructuring*  
(Hunt & Goetz, 1997; Lipsky & Gartner, 1997; McGregor & Volgelsberg, 1998; Villa & Thousand, 2000)
- *Review of Literature & Research on Paraprofessionals*  
(Giangreco, Edelman, Broer & Doyle, 2001; Giangreco & Doyle, 2002; Jones & Bender, 1993; Pickett, 1999; Pickett & Gerlach, 1997)

<b><i>Planning Steps &amp; Activities</i></b>		Dates & Times Scheduled	Date Completed
<i>Complete Steps 1-8 over a one to two month period; begin initial implementation as soon after as possible</i>	<b>BEFORE FIRST MEETING:</b> 1. Establish a planning team. ↪ <i>Homework: Members become familiar with Guide</i>		
	<b>FIRST MEETING</b> (approximately 2 hrs.) 2. <i>SCREENING</i> "Is our school overreliant on paraprofessionals or utilizing them inappropriately?" If "Yes," continue with the next steps.  3. Rank the four problem clusters to help establish the school's local focus.  4. Become knowledgeable about existing alternatives to current overreliance or inappropriate utilization of paraprofessionals. ↪ <i>Homework: Read about existing alternatives</i>		
	<b>SECOND MEETING</b> (approximately 2 hrs.) 5. Engage in self-assessment of the school's current practices. ↪ <i>Homework: Collect any missing information</i>		
	<b>THIRD MEETING</b> (approximately 2 hrs.) ↪ <i>Unfinished work: Complete Step 5 if needed</i> 6. Prioritize the areas of greatest need the team intends to work on first.  7. Consider possibilities to adopt, adapt or invent alternatives to address selected priorities.		
	<b>FOURTH MEETING</b> (approximately 3 hrs.) 8. Develop an Action Plan & Evaluation Plan. ↪ <i>Homework: Implement the plan and collect data</i>		
<i>After Step 8 time varies</i>	<b>FIFTH MEETING</b> (approximately 2 hrs.) 9. Review data and summarize the plan's impact. ↪ <i>Homework: Write a report of your findings</i>  10. Communicate activities, progress, and outcomes to the school community. ↪ <i>Homework: Make arrangements to share findings</i> ↪ <i>Homework: Adjust and cycle through the process</i>		



## 1. *Establish a planning team.*

Try to *maintain a workable team size* of approximately 8 people who can represent different groups. Invite people who have a variety of experiences working with various types of students. We suggest balancing the team's membership as listed below, but ultimately it's up to your school to decide.

In *selecting a Consumer or Student with a disability*, we suggest you consider local norms for age-appropriateness. For example, if your school serves younger students you might decide to invite a high school student or maybe one who graduated from your school. You might invite an adult with a disability.

You will notice that we suggest you *invite a "critical friend."* This refers to a skilled, knowledgeable person whose role it will be to provide a respected "outsider's" perspective and challenge conventional wisdom within the system. This person asks constructive questions and offers reflective feedback. This may be a voluntary or compensated role. This person should spend time getting to know the school, not just attend the team's meetings.

Also, be aware that because of the time commitment involved in this type of planning, you may have to *go the extra mile to keep members involved*. Consider supports for parents such as child care, meeting times, and transportation. Consider supports for school personnel such as release time, comp time, or compensation for hourly employees.

### *Our Planning Team Members*

<i>Constituency Represented</i>	<i>Name</i>
1. General Education Administrator	
2. Special Education Administrator	
3. Parent/Community Member	
4. General Education Teacher	
5. Special Education Teacher	
6. Paraprofessional	
7. Consumer/Student with a Disability	
8. "Critical Friend"	

## 2. SCREENING: *Is our school overreliant on paraprofessionals or utilizing them inappropriately?*

**Purpose:** This screening tool is designed to assist your team in determining whether your school is overreliant or inappropriately reliant on paraprofessionals.

**Directions:** For each of the 16 examples below, put a check in the box to the right of the statement that most closely reflects your team's perspective.

<i>You know there is a problem when...</i>	Happens Frequently/ Too Often	Happens Sometimes or for Some	Happens Never or Rarely
1. ... the numbers of paraprofessionals has increased, in part, because there is a general belief that one of <i>the primary ways</i> to support students with disabilities in general education classes is to assign a paraprofessional.			
2. ... students with disabilities spend most of their time in close proximity to paraprofessionals (e.g., excessively or unnecessarily).			
3. ... students with disabilities are physically separated within the classroom (e.g., back or side of room) to work with a paraprofessional.			
4. ... paraprofessionals or classroom teachers are unfamiliar with the IEP goals and other curriculum content for the students with disabilities in the classroom.			
5. ... students with disabilities receive their primary instruction from paraprofessionals, while special educators do paperwork and manage the activities of paraprofessionals.			
6. ... classroom teachers are minimally or superficially involved with students with disabilities who are placed in their classes.			
7. ... paraprofessionals make curricular or instructional decisions or make adaptations without teacher or special educator oversight.			
8. ... students with disabilities are highly and unnecessarily dependent on paraprofessionals.			

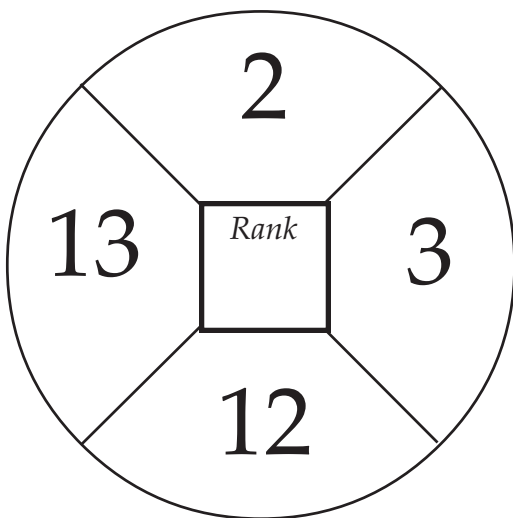
<i>You know there is a problem when...</i>	Happens Frequently / Too Often	Happens Sometimes or for Some	Happens Never or Rarely
9. ... paraprofessionals have more frequent communication and more developed working relationships with the parents of students with disabilities than teachers or special educators.			
10. ... the absence of a paraprofessional results in either : (a) a "lost day" at school for a student with a disability because others don't know what to do (e.g., instruction, personal care, behavior support) (b) the child staying home from school, or (c) the parent is asked to be the substitute paraprofessional.			
11. ... paraprofessionals operate with virtually unrestricted autonomy (e.g., during a teacher-led lesson a paraprofessional removes a student with a disability or changes the activity).			
12. ... students with disabilities spend time with paraprofessionals that typically would be spent with peers (e.g., lunch, playground, free time, hall passing) and/or think of paraprofessionals as their primary "friends" at school.			
13. ... students with disabilities communicate through their language or behavior that they find the support of a paraprofessional stigmatizing or otherwise unwanted.			
14. ... paraprofessionals provide academic support in subjects where they are under- or unskilled.			
15. ... teachers or special educators spend time doing clerical tasks while paraprofessionals are teaching lessons to students with disabilities.			
16. ... at progress reporting time, teachers or special educators rely on paraprofessionals because they know more about the students.			

**DECISION POINT:** Do our responses to the screening statements suggest that we should continue to pursue further planning and actions with the *Guide to Selecting Alternatives...*? The more items marked "Happens Sometimes" or "Happens Frequently" the greater the school's need. Circle **YES** or **NO** and proceed accordingly.

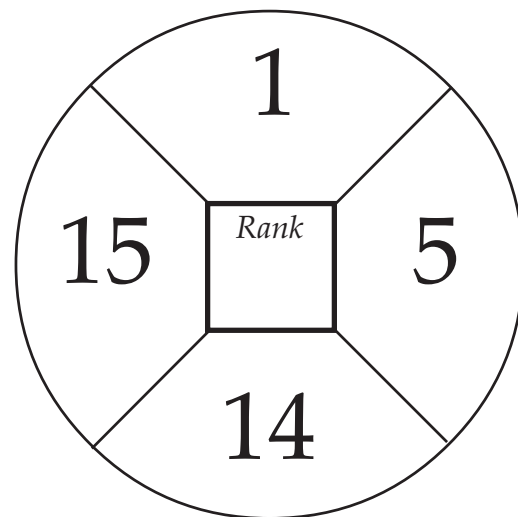
3. Rank the four problem clusters to help establish the school's local focus.

**Directions:** Using your team's responses to the 16 screening items, put **one circle** around each number corresponding with the response "Happens Sometimes..." and **two circles** around the each number corresponding with "Happens Frequently". Next, rank order the clusters (1-4) where #1 is the greatest need .

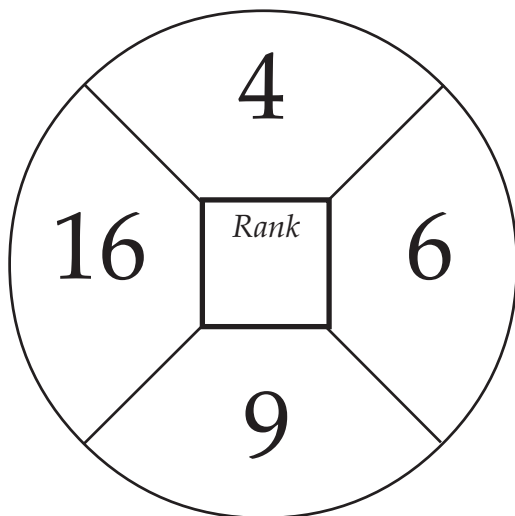
*Excessive Proximity or Isolation within the Classroom*



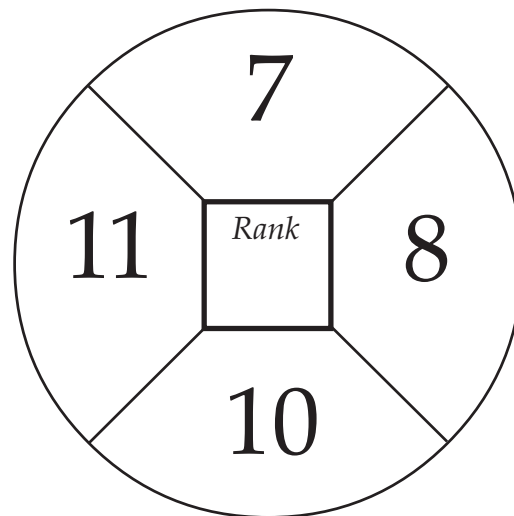
*Questionable Resource Allocation or Instructional Role Mismatches*



*Insufficient Special Educator and/or Teacher Ownership and Engagement*



*Dependence on Paraprofessionals or Inappropriate Autonomy*



4. *Become knowledgeable about existing alternatives to current overreliance or inappropriate utilization of paraprofessionals.*

**Directions:** Each team member should become familiar with existing alternatives by reading about them. More detailed information about the options listed below is described in a document available on the internet. This document is internet based so it can be updated as new information becomes available. You can access this document at <http://www.uvm.edu/~cdci/evolve/alternativeinfo.html>

### *Existing Alternatives ...*

- |   |  |
|---|--|
| <ol style="list-style-type: none"> <li>1. <i>Resource Reallocation: Trading Paraprofessionals for Teachers and Special Educators</i></li> <li>2. <i>Co-Teaching: Special Education &amp; General Education Teachers</i></li> <li>3. <i>Dual-Certified Teachers (General &amp; Special Education) is Classroom Teacher &amp; Case Manages Students with Disabilities</i></li> <li>4. <i>Building Capacity and Increasing Ownership of Teachers and Special Educators to Support Students with Disabilities</i></li> <li>5. <i>Reassigning Roles to Increase Professional Educator Time with Students with Disabilities (e.g., Paperwork Paraprofessional)</i></li> </ol> | <ol style="list-style-type: none"> <li>6. <i>Differentiated Teacher Roles: All Instructional Faculty are Certified Teachers with Varying Roles, Tasks, Time Involvement</i></li> <li>7. <i>Improving Working Conditions of Special Educators: (e.g., caseloads)</i></li> <li>8. <i>Improving Working Conditions of General Educators: (e.g., class size &amp; composition, support system)</i></li> <li>9. <i>Peer Support Strategies: Social/ Personal &amp; Academic Supports</i></li> <li>10. <i>Self-Determination: Involving students with disabilities in determining own supports</i></li> <li>11. <i>Information Sharing: Providing Parents, Teachers, etc. with Related Information (e.g., research on paraprofessionals, IDEA, inclusion)</i></li> <li>12. <i>Physical Placement &amp; Rearrangement: Full Access to and within Regular Class to Ensure Participation</i></li> </ol> |
|---|--|

5. Engage in self-assessment of the school's current practices.

**Directions:** When considering each of the following 20 statements:  
 Ask: "As a team, do we have enough information/knowledge to respond to the statement with confidence and consensus?" If "Yes," put a check mark in the box that most closely reflects the team's perspective. In the additional space provided, list important facts or perspectives upon which your response is based. If "No," make a plan to get the necessary information prior to the next meeting.

Check one box for each statement				
A.	Needs Major Work	Needs Some Work	OK for now	Doing Well
<b>School &amp; Classroom Environment &amp; Practices</b>				
1. Students with disabilities are educated in the school they would attend if they were not disabled.				
2. Students are placed in chronologically-age appropriate general education classes and the number of students with disabilities in those classes is naturally proportional (e.g., no more than 10 to 15% have disabilities).				
3. The school has a well functioning schoolwide support system to provide needed assistance to students with and without disabilities.				
4. Students with disabilities are physically situated within classrooms to facilitate their participation with classmates and instruction by the classroom teacher (e.g., not isolated in the back or side of the room).				
Important Related Facts or Perspectives				

<b>B.</b>	Check one box for each statement			
	Needs Major Work	Needs Some Work	OK for now	Doing Well
<b>Teacher Practices</b>				
5. Teachers in our school have positive attitudes about including students with a full range of disabilities as members of their classroom community.				
6. Teachers think it is their role to provide instruction for students with a full range of disabilities who are placed in their classrooms, rather than primarily serving as hosts.				
7. Teachers have the knowledge and skills to successfully differentiate instruction for mixed-ability groups that include students with and without disabilities, within the context of typical class activities.				
8. Teachers have working conditions (e.g., class size, class composition, materials, supports) that facilitate including and instructing students with a full range of disabilities in their classrooms.				
Important Related Facts or Perspectives				

C.	Check one box for each statement			
	Needs Major Work	Needs Some Work	OK for now	Doing Well
<b>Special Educator Practices</b>				
9. Special education teachers have working conditions (e.g., manageable caseload size, caseload composition, materials, manageable number of paraprofessionals to supervise) that facilitate individualized special education for students on their caseload.				
10. Special educators have the knowledge of the general education curriculum and standards and the skills to successfully individualize curriculum for students with disabilities.				
11. Special educators have the knowledge and skills to successfully differentiate instruction within the context of class activities for mixed-ability groups that include students with and without disabilities.				
Important Related Facts or Perspectives				



<b>D.</b>	Check one box for each statement			
	Needs Major Work	Needs Some Work	OK for now	Doing Well
<b>Teacher &amp; Special Educator Collaboration</b>				
12. Teachers and special educators schedule time to work with students who have disabilities and collaborate with each other by assigning paraprofessionals to noninstructional support tasks (e.g., clerical, attendance, lunch, playground supervision) and professionally planned and supported instruction (e.g., practice sessions).				
13. Teachers and special educators are familiar enough with all the students in the classroom, the curriculum, and instructional approaches, that the temporary exchange of primary roles can occur without major disruption to students with or without disabilities.				
14. Teachers and special educators are familiar enough with the various educational and support needs of the students with disabilities in the classroom that the temporary absence of a paraprofessional can occur without major disruption to students with or without disabilities.				
Important Related Facts or Perspectives				

E.	Check one box for each statement			
	Needs Major Work	Needs Some Work	OK for now	Doing Well
<b>Family Information and Participation</b>				
15. Families are well informed about how the school defines appropriate and potentially inappropriate roles of paraprofessionals.				
16. Families are well informed about the potential benefits and drawbacks of providing paraprofessional supports.				
17. Families are well informed about information the school considers to determine whether paraprofessional supports should be included in their child's IEP.				
18. Parents and students with disabilities (when appropriate) participate as team members in developing and implementing the IEP.				
Important Related Facts or Perspectives				

F.	Check one box for each statement			
	Needs Major Work	Needs Some Work	OK for now	Doing Well
<b>Students Participation and Reciprocal Support</b>				
19. Students with and without disabilities (when age-appropriate) are actively involved in making decisions about their own supports in schools.				
20. Classmates with and without disabilities have opportunities to provide natural supports to each other or cross-age peers.				
Important Related Facts or Perspectives				

6. *Prioritize the areas of greatest need the team intends to work on first.*

- Base priority selections on your team's self-assessment ratings from Step 5, other relevant facts, perspectives, and agreed upon criteria (e.g., importance, cost, simplicity, time to enact, number of people affected).
- Below, list a maximum of five items from the 20 items included in Step 5 that reflect your team's priorities. Feel free to reword the items in ways that make sense to your team.
- **CIRCLE** a subset of the ranked items that your team proposes to work on first. You can begin by working on any number of priorities. Since some priorities are more complex than others, select what you think you can reasonably accomplish in a specified time period (e.g., the school year).

*Our Team's Top 5 Priorities are:*

Rank      Item Number and Description (from Step 5)

#1

#2

#3

#4

#5

## 7. Consider possibilities to adopt, adapt or invent alternatives to address selected priorities.

Now your team is ready to consider possibilities using the *Brainstorming Worksheet*. Don't be too quick to come to a decision. Part of effective problem-solving is deferring judgment, generating quantity of ideas, and being open to new possibilities. Then, once you have considered many possibilities, it will be time to evaluate your ideas and converge on what actions you will take.

Given the range and complexity of priorities your team has identified, it is quite likely that no single alternative will be sufficient to address the needs. Therefore, be thinking about a *package of alternatives* you can pursue. The number of alternatives and their size is up to your school to decide.

As you start to consider which alternatives to put in your school's package, be thinking about *alternatives you can act on quickly* while you work on developing *others that will take longer* to put in place. To assist your team, we suggest you begin by considering whether any existing alternatives make sense in your situation, then moving on to considering adaptations of existing alternatives. Finally, if *adopting* or *adapting* doesn't meet the need, it's time for your team to get very creative and consider *inventing* something that works in your school.

**Directions:** For each ranked priority that your team circled in Step 6 (p. 18) use a *Brainstorming Worksheet* (see pp. 23-25) to consider possibilities and evaluate them.

### A. Start by Restating Each Identified Priority Using IWWMW...

IWWMW stands for "*In what ways might we...*" Problem-solving research suggests that idea-generation is facilitated when problems are restated in the affirmative and put into a question format. For example, rather than "*How can we avoid having students with disabilities isolated within the classroom?*" we could say, "*In what ways might we ensure that students with disabilities are physically situated within classrooms to facilitate their participation with classmates and instruction by the classroom teacher?*"

Each of the 20 items included in the *Self-Assessment* lists (Step 5) is stated in the affirmative. They represent the other side of the coin when compared to the problem statements in the *Screening* tool (Step 2). Step 7 starts by taking each of the priorities you selected in Step 6 and putting them in a question format starting with IWWMW. Sometimes the original wording will fit just right; at other times you will want to modify the language of the item to better focus on your vision for your school.

## ***B. Brainstorm Possibilities (Approach this task in three phases):***

- ***Consider Adopting an Existing Alternative (or set of alternatives)***

In other words, try to avoid reinventing the wheel. Use the information you read about in Step 4. Also, refer to the "Match Matrix" on page 22; it cross-references each of the 20 self-assessment items with two of the most obvious existing alternatives that can be considered to address the need. Although other boxes in the matrix could reasonably be marked, we offer a couple to getting the ball rolling. Your team may find that unmarked alternatives are appropriate.

- ***Consider Adapting Existing Alternatives***

Sometimes existing alternatives do not fit a school's need in their known forms -- that's when it is time to consider *adapting* existing alternatives, this means making adjustments so that it fits in your school. *Idea-joggers*, from creative problem-solving, can be used to play with ideas to adapt them, Idea-joggers prompt us to think about known facts and ideas in new ways. So take existing alternatives or related facts that you think hold promise and ask questions such as:

***What new variation might we generate if we took the original idea and...***

*made it bigger?*

*made it smaller?*

*rearranged it?*

*stretched it?*

*reversed it?*

*eliminated it?*

*twisted it?*

*looked at it from the inside out?*

*turned it upside down?*

- ***Invent New Ideas***

When adopting or adapting existing alternatives doesn't meet your school's need, it is time to consider inventing something new. At its heart, generating new ideas is about discovering new relationships between known facts. So refer to the relevant facts you collected during the *Self-Assessment* step of this process. Use the *Idea-Joggers* listed above along with the following strategies:

- Emphasize the generation of a quantity of ideas (to help get past the obvious)
- Defer judgment (don't judge ideas prematurely)
- Be open to seemingly wild or unconventional ideas
- Encourage hitchhiking on ideas
- Rely on relevant facts to help spur ideas
- Use metaphors and analogies to generate ideas
- Use *forced relationships* (looking for connections, similarities, associations, between seemingly unrelated objects or ideas)

### ***C. Determine Criteria***

Determine a set of criteria to help your team decide which of the brainstormed possibilities are most suitable for your situation.

*Example Criteria:*

- matches highly focus need area identified in Step 3
- doable
- cost
- time to enact
- number of faculty and staff affected
- number of students affected
- proposed impact on student learning
- consistency with the IDEA
- other criteria your team determines

### ***D. Evaluate Ideas Using Criteria***

**Evaluate a subset of your team's most promising ideas** based on the criteria you choose (see grid on Brainstorming Worksheet). You can use whatever scoring scheme makes sense to you (e.g., check marks; plus/minus; rating scale). If you want to you can weight certain criteria if you think they are more important than others. You need not evaluate every idea, just the most promising ones.

### ***E. Select the Ideas to Pursue***

Use your evaluation of the ideas to help you **select the ideas you will pursue**. Do not use the criteria as a "formula" to make the decision for you, but as a way to guide your evaluation and discussion about what you want to do. **Circle the most promising set of ideas.**

***Repeat the use of the Brainstorming Worksheet  
for each of the priorities you selected in Step 6***

### ***Incubation!!***

*There is purposely a break between this brainstorming activity (which occurs during the third team meeting) and Action-Planning (which occurs during the fourth meeting). This allows team members an opportunity to think about their ideas, away from the meeting process. This often leads to new connections that can help in planning.*

## *Matrix for Matching Existing Alternatives to Self-Assessed Priorities*

<i>Existing Alternatives (from Step 4)</i>	<i>Self-Assessment Items (from Step 5)</i>																			
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
1. <i>Resource Reallocation</i>	•							•			•									
2. <i>Co-Teaching</i>					•	•	•						•	•						
3. <i>Dual-Certified Teachers</i>					•	•				•	•									
4. <i>Building Capacity</i>			•		•	•	•			•	•	•	•	•						
5. <i>Reassigning Roles</i>												•								
6. <i>Differentiated Teacher Roles</i>								•												
7. <i>Improving Working Conditions of Special Educators</i>									•											
8. <i>Improving Working Conditions of General Educators</i>			•		•			•												
9. <i>Peer Support Strategies</i>																			•	•
10. <i>Self-Determination</i>															•	•	•	•	•	•
11. <i>Information Sharing</i>	•	•		•											•		•	•		
12. <i>Physical Placement &amp; Rearrangement</i>	•	•		•																

• = two of the most obvious connections between self-assessment priorities and existing alternatives



A. *In what ways might we*

# Brainstorming Worksheet

B. Brainstormed Possibilities

C. Determine Criteria

D. Evaluate Ideas Using Criteria

E. Select the Ideas to Pursue  
(indicate by circling)





## 8. *Develop an Action Plan and Evaluation Plan.*

**Directions and Information:** For each identified priority and corresponding brainstorming worksheet, complete one Action Plan & Evaluation Plan form. These forms may not provide sufficient room to record all the details you would like, so keep additional records. These forms are designed to present a summary of key points and clearly communicate your team's *Chain of Reasoning*. This starts with your selected actions, leads to proposed outputs of those actions, and ultimately to student outcomes. Here are suggested steps for completing the form:

**A. List the Priority Number (from Step 6) in the space provided.**

**B. Write the IWWMW question from the Brainstorming Worksheet.**

**C. In the column labeled "Actions/Ideas" expand on the ideas you selected during brainstorming:**

- List your team's idea(s) and plan in a way that makes sense to your team.
- Describe the logistics (e.g., What will be done, by whom, when?).
- Identify resources needed to implement your plan.

**D. In the column labeled "Proposed Outputs" expand your chain of reasoning by linking your selected actions to proposed outputs that reflect what those actions are intended to do to improve education for students with disabilities.**

- **Check the box(es)** that most appropriately match your team's intentions.
- For each checked box, **list the types of data** your team thinks would be important to collect to determine if your proposed intentions are being realized. Develop a data collection plan.

**E. In the column labeled "Student Outcomes" expand your chain of reasoning by linking your proposed outputs to anticipated student outcomes.**

- **Check the box(es)** that most appropriately match the student outcomes your team hopes to achieve through its actions.
- For each checked box, **list the types of data** your team thinks would be important to collect to determine if your proposed intentions are resulting in the anticipated student outcomes. Develop a data collection plan.

**F. Implement plans and record progress (use Implementation Notes pp. 31-33)**

### Example 1:

Let's imagine that in the **Actions/Ideas column** your team listed "*Resource Reallocation*" as one of its ideas. This was specifically described as reallocating funds currently designated for four paraprofessional positions to hire one special educator. A second action in the same column was to pursue "*Reassigning Roles*", specifically to establish a Paperwork Paraprofessional role designed to free up potential time for teachers and special educators. In the **Proposed Outputs column** your team might check the box, "*Increased teacher and special educator instructional contact time with students*," as a logical link in the chain of reasoning. In the space for data, the team might write, "*Measure increase in the amount of instructional contact time teachers and special educators have with students who have disabilities.*" In the **Student Outcomes column** your team might check the box, "*Academic Achievement*," and in the space for data might write, "*Test scores, grades, portfolio evidence, and progress on IEP goals*". This extends the chain of reasoning because the team hopes that the increase in instructional time leads to student achievement.

### Example 2:

Let's imagine that in the **Actions/Ideas column** your team listed "*Peer Support Strategies*" as one of its ideas and specified its components. This was selected because the team recognized that too many students with disabilities were receiving supports that could be provided more naturally by peers. In the **Proposed Outputs column** your team might check the box, "*More effective use of professional, paraprofessional and natural supports*," as a logical link in the chain of reasoning. In the space for data, the team might write, "*Record list of tasks/supports provided by peers that were previously provided by paraprofessionals such as hallway transitions, lunchtime support, bus arrival routine.*" In the **Student Outcomes column** your team might check the box, "*Increased frequency and quality of peer interactions*," and in the space for data might write, "*Measure increase in time spent with peers; observe and record quality of interactions; ask students about their perspectives.*" This extends the chain of reasoning because the team hopes that the increase in peer involvement leads to more time with peers and the development of positive relationships.

## Action Plan & Evaluation Plan

Selected ideas corresponding to priority # \_\_\_\_ (from Step 6):  
IWWMW:

### *Chain of Reasoning*

Actions / Ideas What? When? Who? Resources needed?	Proposed Outputs What will the actions do to improve education for students with disabilities?	Student Outcomes How will students with disabilities be positively affected by the proposed outputs?
	<input type="checkbox"/> Increased access to regular class placements, curriculum or activities Data: <input type="checkbox"/> Increased collaboration between regular and special education Data: <input type="checkbox"/> Increased teacher and special educator instructional contact time with students Data: <input type="checkbox"/> Increased ownership and capacity of teachers and special educators Data: <input type="checkbox"/> More informed families and / or greater participation in educational decisions Data: <input type="checkbox"/> More effective use of professional, paraprofessional, and natural supports Data: <input type="checkbox"/> Other: Data:	<input type="checkbox"/> Increased belonging, inclusion, and opportunities Data: <input type="checkbox"/> Academic achievement (e.g., general education curriculum, IEP goals) Data: <input type="checkbox"/> Improved social skills or behavior Data: <input type="checkbox"/> Increased frequency and quality of peer interactions Data: <input type="checkbox"/> Increased self-determination: Data: <input type="checkbox"/> Other: Data: <input type="checkbox"/> Other: Data: <input type="checkbox"/> Other: Data:

\*\* Use this form to summarize your plan and chain of reasoning. Attach additional detailed information as needed.

## Action Plan & Evaluation Plan

Selected ideas corresponding to priority # \_\_\_ (from Step 6):  
IWWMW:

### *Chain of Reasoning*

Actions / Ideas What? When? Who? Resources needed?	Proposed Outputs What will the actions do to improve education for students with disabilities?	Student Outcomes How will students with disabilities be positively affected by the proposed outputs?
	<input type="checkbox"/> Increased access to regular class placements, curriculum or activities Data: <input type="checkbox"/> Increased collaboration between regular and special education Data: <input type="checkbox"/> Increased teacher and special educator instructional contact time with students Data: <input type="checkbox"/> Increased ownership and capacity of teachers and special educators Data: <input type="checkbox"/> More informed families and / or greater participation in educational decisions Data: <input type="checkbox"/> More effective use of professional, paraprofessional, and natural supports Data: <input type="checkbox"/> Other: Data:	<input type="checkbox"/> Increased belonging, inclusion, and opportunities Data: <input type="checkbox"/> Academic achievement (e.g., general education curriculum, IEP goals) Data: <input type="checkbox"/> Improved social skills or behavior Data: <input type="checkbox"/> Increased frequency and quality of peer interactions Data: <input type="checkbox"/> Increased self-determination: Data: <input type="checkbox"/> Other: Data: <input type="checkbox"/> Other: Data: <input type="checkbox"/> Other: Data:

\*\* Use this form to summarize your plan and chain of reasoning. Attach additional detailed information as needed.

## Action Plan & Evaluation Plan

Selected ideas corresponding to priority # \_\_\_ (from Step 6):  
IWWMW:

### *Chain of Reasoning*

Actions / Ideas What? When? Who? Resources needed?	Proposed Outputs What will the actions do to improve education for students with disabilities?	Student Outcomes How will students with disabilities be positively affected by the proposed outputs?
	<input type="checkbox"/> Increased access to regular class placements, curriculum or activities Data: <input type="checkbox"/> Increased collaboration between regular and special education Data: <input type="checkbox"/> Increased teacher and special educator instructional contact time with students Data: <input type="checkbox"/> Increased ownership and capacity of teachers and special educators Data: <input type="checkbox"/> More informed families and / or greater participation in educational decisions Data: <input type="checkbox"/> More effective use of professional, paraprofessional, and natural supports Data: <input type="checkbox"/> Other: Data:	<input type="checkbox"/> Increased belonging, inclusion, and opportunities Data: <input type="checkbox"/> Academic achievement (e.g., general education curriculum, IEP goals) Data: <input type="checkbox"/> Improved social skills or behavior Data: <input type="checkbox"/> Increased frequency and quality of peer interactions Data: <input type="checkbox"/> Increased self-determination: Data: <input type="checkbox"/> Other: Data: <input type="checkbox"/> Other: Data: <input type="checkbox"/> Other: Data:

\*\* Use this form to summarize your plan and chain of reasoning. Attach additional detailed information as needed.



# *Implementation Notes*

(activities, adjustments, progress, etc.)

Dates	Notes

# *Implementation Notes*

(activities, adjustments, progress, etc.)

Dates	Notes

# *Implementation Notes*

(activities, adjustments, progress, etc.)

Dates	Notes

## 9. *Review data and summarize the plan's impact.*

***Directions and Information:*** Analyze and discuss the implications of the data your school has collected. Prepare notes for a summary report. Consider using the following headings to guide the development of your discussion and report. You are encouraged to prepare this report in a manner that is suitable for practical uses in your organization (e.g., to submit to the Superintendent or School Board).

Throughout your reporting try to maintain a focus on two overarching questions:

- *In what ways are the lives of students with disabilities better off as a result of the actions our team implemented based on this process?*
- *How can we clearly communicate the chain of reasoning that connects this action planning with student outcomes?*

***Suggested Headings*** (edit these or create your own):

***A. Why Our School Needed Alternatives to Paraprofessional Supports***

- *Findings from Screening and other relevant contextual information*

***B. How Our School Approached the Challenge***

- *Used Guidelines for Selecting Alternatives...*

***C. The "Actions/Ideas" We Decided to Implement***

- *Sufficient detail for a person who was not involved to understand*

***D. The "Chain of Reasoning" We Used and the Data We Collected***

- *Actions to Proposed Outputs to Student Outcomes*

***E. Our Successes in Implementing Our Plans and the Barriers we Faced***

***F. Findings***

- *Did our chain of reasoning play out the way we had anticipated?*
- *Did our actions lead to changes in our work and in student outcomes?*
- *Were there any unanticipated outcomes (for faculty or students)?*

***F. Implications and Next Steps***

- *What are the programmatic, fiscal, and personnel implications?*
- *Where do we intend to go from here?*

*10. Communicate activities, progress, and outcomes to the school community.*

Suggested "To Do's"

1. Once you have completed your report (Step 9), decide if its contents need to be put into different formats for different audiences (e.g., a slide show for a board presentation, a one-page highlights summary).
2. Share the findings with your local school community and other appropriate groups. As a planning team, decide what audiences the information will be disseminated to, the corresponding format, and timelines.
3. Cycle through the planning process to continue ongoing school improvement. Review team membership and make needed changes. Return to your team's previously identified priorities and self-assessment to begin the process of selecting new challenges to pursue.

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*adopt, adapt, invent...*