Student Assistance Program (SAP) Manual

San Francisco Unified School District
Student Support Services Department

Revised August 2009
# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is a Student Assistance Program (SAP)?</td>
<td>3</td>
</tr>
<tr>
<td>SAP/SST: A Brief Comparison</td>
<td>4</td>
</tr>
<tr>
<td>How to Initiate a Student Assistance Program (SAP)</td>
<td>5-6</td>
</tr>
<tr>
<td>Request for Assistance (1.0) form</td>
<td>7</td>
</tr>
<tr>
<td>SAP Meeting Roles and Responsibilities</td>
<td>8</td>
</tr>
<tr>
<td>SAP Flowchart</td>
<td>9</td>
</tr>
<tr>
<td>SAP Interventions</td>
<td>10-11</td>
</tr>
<tr>
<td>SAP Follow-Up Practices</td>
<td>12</td>
</tr>
<tr>
<td>SAP Best Practices Checklist</td>
<td>13-14</td>
</tr>
<tr>
<td>What is Facilitation?</td>
<td>15</td>
</tr>
<tr>
<td>Facilitator Self-Assessment Checklist</td>
<td>16</td>
</tr>
<tr>
<td>Sample SAP Meeting Agenda #1</td>
<td>17</td>
</tr>
<tr>
<td>Sample SAP Meeting Agenda #2</td>
<td>18-19</td>
</tr>
<tr>
<td>Sample SAP Meeting Agenda #3</td>
<td>20</td>
</tr>
<tr>
<td>Sample SAP Action Plan</td>
<td>21</td>
</tr>
<tr>
<td>Sample SAP Case Management/Follow-up Form</td>
<td>22</td>
</tr>
<tr>
<td>Sample Parent/Teacher Conference Form</td>
<td>23</td>
</tr>
<tr>
<td>SFUSD Oath of Confidentiality</td>
<td>24</td>
</tr>
</tbody>
</table>
What is a Student Assistance Program (SAP)?

The Student Assistance Program (SAP) is a “learning support” umbrella structure that brings together all support service providers at a school site. The SAP provides early identification, assessment, referral, support, and service coordination for students experiencing academic, attendance, behavior/social, or health problems that impact school success. The SAP focuses on referred students, and coordinates respective programs and services to promote their academic success. In addition, the SAP provides a forum for school-wide issues to be identified and addressed.

**The SAP process includes:**

1) **Early Identification:** Students with academic, attendance, behavior/social, health issues are referred to the SAP team by school staff.

2) **Assessment:** SAP team gathers information regarding the student referred and identifies the student’s strengths and needs.

3) **Planning and Support:** SAP team identifies and links students with school and community based interventions and resources.

4) **Service Coordination:** Identified SAP team member follows a student’s progress with recommended interventions and resources.

5) **School-wide Assessment & Program Development:** Identifying, linking and developing resources—within and outside the school community—that reflect the broad issues/trends identified by the team to support student success (e.g. - support groups, mentoring, positive behavior support, structured before-school and recess activities).

**Who is on the SAP team?**

- Administrator/Principal
- Attendance Liaison
- Dean or Head Counselor
- Elementary or Middle School Advisors
- ExCEL After School Program Site Coordinator (ASP)
- Instructional Reform Facilitator
- Learning Support Professional (LSP) and/or Wellness Coordinator (WC)
- Outreach Coordinator
- Parent Liaison
- Representative of Community Based Organizations (CBOs) regularly on-site
- School Counselor
- School District Nurse (SDN)
- School Psychologist
- Site Nutrition Coordinator (SNC)
- Special Education Representative (e.g. Resource Specialist -RSP teacher)
- Others, as recommended by Team

**A SAP can address students who:**

- Exhibit behavioral/mental health issues
- Face significant illness or disability
- Have chronic attendance problems
- Have difficulty with academics
- Have family or peer issues
- Suffer from trauma associated with exposure to violence
- Use/abuse substances
- Are experiencing sexual health, sexual orientation, pregnancy issues
The Student Assistance Program (SAP) is a “learning support” umbrella structure that brings together all support service providers at a school site. The SAP develops and monitors programs and resources that enhance prevention and intervention efforts contributing to student success. The SAP focuses on referred students, and coordinates respective programs and services to promote their academic success. **At the elementary level the SAP may also be referred to as the Coordinated Services Team (CST) or Care Team.**

The Student Success Team (SST) is a problem solving and coordinating structure that assists individual students, families and teachers to seek positive solutions for maximizing student potential. The SST focuses in-depth on one student at a time, and invites the parent/caregiver and student to participate in finding solutions.

### SAP and SST: A Brief Comparison

<table>
<thead>
<tr>
<th>SAP</th>
<th>SST</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Who:</strong> Site administrators, learning support staff and “support service” providers (See <em>What is a Student Assistance Program (SAP)</em>? (pg. 2)</td>
<td><strong>Who:</strong> Parent/caregiver, student, teachers, administrator, counselor, service/support providers at school site, CBOs working with the student and family, special education representative, and SST Coordinator.</td>
</tr>
<tr>
<td><em>Meeting for staff only, no parents or students.</em></td>
<td><em>School psychologist is invited to assist as a consultant, if and when available.</em></td>
</tr>
</tbody>
</table>
| **Focus:** 1) *Multiple* students with: academic, behavior/social, attendance, and health/mental health concerns.  
2) Link students with site/community resources.  
3) *Develop and coordinate school-wide programs* reflective of students’ needs. | **Focus:** 1) *One* identified student: academic, attendance, behavior/social, and/or health/mental health concerns.  
2) Multidimensional action plan developed.  
3) Follow-up meeting involving all stakeholders to review the action plan. |
| **How:** 1) Students are ‘case managed’ by the team and followed by one team member to assist with access to resources and supports for positive progress.  
2) Develop and implement educational support programs based on identified needs. | **How:** 1) Team explores strategies to develop an intervention plan involving home, classroom, school, and community.  
2) Designated “case manager” helps to oversee implementation of the intervention plan/action items.  
3) Spec. Ed. Assessment may be considered an option, following documentation of interventions and student’s response to those interventions. |
| **When:** Weekly meetings of the team. | **When:** Scheduled meetings called by SST coordinator accommodating schedules of stakeholders. |
How to Initiate a Student Assistance Program (SAP)

1. Enlist support from the site administrator to implement an effective SAP
   - Commitment/leadership from the site administrator is the key to a successful SAP
   - Meet with the Principal or Assistant Principal to confirm support for developing an effective SAP. Provide administrator with background information about SAPs and the benefits of student support services
     Useful documents: What is a Student Assistance Program? (pg. 3)  
     SAP and SST: A Brief Comparison (pg. 4)  
     SAP Flow Chart (pg. 9)
   - Identify SAP team members, including who will serve as the SAP Coordinator/Facilitator. See SAP Meeting Roles and Responsibilities (pg. 8)
   - Identify a meeting space that is convenient, private, and available on a weekly basis
   - Agree on a referral process. Use the SAP Flowchart (pg. 9) as a guide

2. Raise staff awareness about SAPs / Get staff commitment
   - Introduce the SAP model to staff at faculty meetings, grade level meetings department meetings and/or other appropriate venues using the following suggested activities:
     a) Describe benefits to staff of having an SAP program, e.g. one-stop referral process; provision of services to students with severe needs, as well as those at mid-risk; support and follow-through that is coordinated
     b) Present a case from start to finish; use SAP Flow Chart (pg. 9)
     c) Review criteria for referral and the referral process, including introduction of the Request for Assistance (1.0) form (pg. 7)
   - Distribute a memo and/or flyer introducing the SAP to all staff
   - Identify allies on staff and utilize their support to engage others

3. Establish a regular meeting time and structure/agenda for SAP meetings
   - When scheduling meetings, consider days/times when most or all support staff are on site (e.g. School Counselor, Learning Support Professional, School District Nurse, School Psychologist, After School Program Site Coordinator, Parent Liaison, Attendance Liaison, etc.)
   - All team members commit to the regularly scheduled meetings and any roles/responsibilities assigned (e.g. coordinator/facilitator, time keeper, recorder, case manager). See SAP Meeting Roles and Responsibilities (pg. 8) for a clarification of roles.
How to Initiate a Student Assistance Program (SAP)

4. Collaborate with teachers at grade level planning meetings, during their prep time or other available times to help identify and refer students to the SAP. (At the elementary level, consider the benefits of a Classroom SST to systematically identify and refer students.)

5. Provide feedback to referral sources, monitor action plans and ensure ongoing evaluation of the effectiveness of the SAP meetings. Utilize the SAP Best Practices Check List (pg. 12-13)

6. Address school-wide trends, issues and concerns by developing school-based programs and linkages with community resources to meet students’ needs and improve their success at school.

   • Map current resources on site provided by school staff or through partnerships with community-based organizations (CBOs). See SFUSD approved CBO List at www.healthiersf.org.

   • Based on students’ needs and trends identified through the SAP process, develop programs to enhance school climate and improve student achievement (e.g. groups, mentoring, tutoring, positive behavior incentive program, create student involvement/leadership opportunities, etc.)
Request for Assistance (1.0)
San Francisco Unified School District

Referral To
- Student Assistance Program (SAP)
- Student Success Team (SST)

--CONFIDENTIAL: please do not leave out for others to read--

<table>
<thead>
<tr>
<th>Student: (Last, First)</th>
<th>Grade</th>
<th>Gender</th>
<th>DOB</th>
<th>Ethnicity</th>
<th>HO#</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent/Caregiver</td>
<td>Home Language</td>
<td>Telephone Number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name of person Making Request</td>
<td>Your Title</td>
<td>Classroom or Telephone Extension</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. Student's Strengths
- Able to problem solve
- Articulates feelings/needs
- Asks for help
- Attentive in class
- Cooperates with others
- Demonstrates sense of humor
- Enjoys math
- Enjoys reading
- Follows instructions
- Helpful to others
- Listens well
- Makes/maintains friendships
- Negotiates/compromises
- Participates in class
- Regular Attendance
- Other: ____________________________

2. Your Concerns about Student
- Please check and provide additional details:
  - Academic
  - Attendance
  - Emotional or Behavioral
  - Family/home
  - Physical Health/Medical
  - Other

3. Prior Interventions
- Behavioral interventions
- Classroom modifications
- Instructional modifications
- Met with student
- Offered tutoring/after-school program
- Spoken to/met with parent/caregiver
- Other: ____________________________

4. Student Profile Section (SAP/Counselor/SST Team to complete):

<table>
<thead>
<tr>
<th>STAR 9 (Two previous yrs): Year</th>
<th>Reading</th>
<th>Lang</th>
<th>Math</th>
<th>Support services student is currently receiving:</th>
</tr>
</thead>
<tbody>
<tr>
<td>After-School Prog</td>
<td>GATE</td>
<td>ELD/ELL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tutoring</td>
<td>Mentoring</td>
<td>Peer Resources</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IEP</td>
<td>504 Plan</td>
<td>Foster Youth Services (FYS)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mental Health</td>
<td>Physical Health</td>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Health
- Most recent Physical Exam: ____________________________
- Immunizations: Complete Incomplete: __________________
- Chronic health conditions? __________________

Screening
- Date | Status Pass/Fail | FU required |
- Vision | |
- Hearing | |

5. Date family notified re: referral to SST: _______ Results: _______

===Feedback to Referring Person===

Date Referral Processed | Primary Contact Person

Action Items Planned
1. ____________________________
2. ____________________________
3. ____________________________

DISTRIBUTION:
- ORIGINAL: SAP Binder
- COPIES: Primary Contact Person & Referral Source
Student Assistance Program (SAP) Meeting Roles and Responsibilities

All SAP team members are active contributors. In addition, the process defines special roles that some members of the team must fill to achieve the greatest positive outcome. Meeting roles may be assigned by the coordinator/facilitator, or team members may select to sign up for a particular role. It is important to ensure that during any meeting each team member’s role is clearly defined before the meeting begins and then maintained throughout that meeting.

Coordinator/Facilitator (Permanent position - designated administrator in collaboration with a student support services professional, e.g. LSP, WC, Counselor, SDN)

- Based on school issues and SAP referrals received, create a meeting agenda and distribute to all SAP team members at, or prior to, the meeting
- Bring SAP binder to meeting
- Ensure that meeting roles are filled (recorder, timekeeper, etc.)
- Begin the meeting, designate an amount of time for each agenda item, allow time for follow-up discussion, and facilitate the meeting
- Facilitate but do not dominate the discussion and help to elicit the most helpful contributions of the group and most important, keep a positive tone at the meeting
- Clarify action items, identify next steps, and ensure that a case manager is assigned to each student discussed
- Make sure all referral forms, meeting agendas and notes are filed in the SAP binder

Recorder/Note Taker (may rotate)

- Make sure to record day and time of the meeting and who attended
- Capture key information and clearly delineate all action items (what, who, and by when)
- Use a laptop and/or a standard meeting notes template to take notes
- Provide a copy of the SAP meeting notes to all SAP team members in a timely manner

Timekeeper (may rotate)

- Assist the Coordinator/Facilitator in starting the meeting on time
- Keep track of time allotted for specific topic discussions and remind the facilitator when discussion time is over
- Provide Coordinator/Facilitator with a five-minute warning toward the end of the meeting

Team Member

- An effective team member is a positive contributor to the work of the team. Members come prepared with information about the students discussed and school-wide issues/programs. Contributions that address difficult problem areas are positive, looking at constructive solutions, rather than characterizing, blaming or stereotyping. Interventions are linked to the students’ strengths and programs developed are linked to students’ needs.
Teacher/Staff Member/Parent is concerned about a student because of:
- academics
- attendance
- behavior/emotional issues
- health

consults with

Support Staff
- Counselor
- Dean
- LSP
- Nurse
- Parent Liaison
- School Psychologist
- Wellness Coordinator
- other

if student is a danger to them self or others (behaving unsafely)

DO NOT WAIT!
Go directly to administrator for appropriate actions and consequences.
Consult w/ the following as needed:
- Police
- Child Crisis
- Child Protective Services
- LSP/Wellness Coordinator
- School Counselor
- School District Nurse

Initial Interventions are Attempted
May Include:
- Student conference
- Parent conference
- Tutoring
- RTI
- Etc.

Teacher/Staff Member/Parent/Student
Fills out Request for Assistance Form 1.0
and gives to SAP Coordinator

SAP Coordinator Reviews and Prepares the Following:
(may delegate tasks to other SAP members as necessary)
- 1.0 Request for Assistance Form
- Attendance Record
- Cum Folder
- Grade Report/Report Card/Progress Reports
- SAP Meeting Agenda

Initial crisis resolved

SAP Team Meeting
- held weekly

Inform referring party of SAP Meeting and Action Plan

SART Meeting

SST Meeting

Follow-up
- Review action plan
- Review progress
- Brainstorm additional interventions

Responsibilites of SAP Team
- Review student history
- Brainstorm interventions, including referrals to school-based services, CBOs, etc.
- Develop Action Plan
- Appoint “Case Manager” or contact person to ensure action plan is implemented
- Set date for follow-up
- Analyze student trends/needs for program development
SAP Interventions: Student

- Conduct a more thorough assessment of the student (e.g. review cum folder, meet with teachers, observe student in class)
- Meet with the student. Get to know him/her.
- Refer student to an after-school program
- Initiate a counseling referral
- Place in a peer or adult mentoring program
- Have the student come up with his/her own academic and/or behavior goals
- Work with student on a behavior contract
- Provide the opportunity for frequent “check-ins”, perhaps by several adults
- Refer to an appropriate student support group
- Don’t wait for trouble to call home, call with good news about the student
- Request that RSP teacher work with students who are academically “at-risk” until further assessment can be done
- Refer for a SST

SAP Interventions: Parent

- Contact parent/caregiver – ask about family strengths and concerns regarding student
- Schedule a parent/teacher conference
  (See Sample Parent/Teacher Conference Form, pg. 22)
- Create a ‘parent space/room’ at the school
- Provide presentations that appeal to parents (e.g. workshops such as “How to talk to your kid so they will listen”, “How to help your child with homework”, “Helping your 6th grader adjust to middle school”, “Making the most of a parent-teacher conference”, etc.)

SAP Interventions: Classroom

- Explicitly teach and review classroom expectations, including transitions
- Provide reinforcement/feedback that is specific and unique to students
- Provide a 4 to 1 ratio of positive reinforcement to corrective action to promote expected classroom behavior
- Catch students being good
- Utilize a “peace table” or “chill-out” space
- Use a multi-sensory approach (e.g. using math manipulatives in addition to verbal and written instructions)
- Incorporate physical/movement activities into academic blocks to provide stress reduction/tension release
- Assign classroom responsibilities/class jobs that build confidence and self-esteem
- Physically arrange classroom consistent with level of structure needed
- Give students choice/options of activities/tasks to increase sense of control and engagement in the classroom
- Encourage team work to accommodate a variety of learning styles (e.g. a student who is a good note taker can provide them to targeted students)
- Enhance selection of high interest books for students
- Break down assignments into smaller sections

(Note: It is sometimes helpful for SAP team members to work one-on-one with teachers to support classroom changes necessary for improved student outcomes.)
Student Assistance Program (SAP) Interventions (continued)

SAP Interventions: School Wide

- Start a mentoring program
- Start a peer mediators/peer conflict managers program
- Increase meaningful involvement and participation in school activities, clubs, and events
- Develop a peer-tutoring program
- Enhance student and campus safety/security (e.g. conflict resolution programs)
- Help create commitment for a school-wide behavior system (e.g. Best Behavior, Caring School Community, Tribes, CHAMPs, IRISE, Omega)
- Give leadership opportunities to students (e.g. crossing guard, office monitoring, conflict resolution mediator)
- Establish a drop-in homework center
- Support transitions: home, school, and classroom, after-school, vacations
- Post school rules/norms in classrooms, halls, restrooms, cafeteria and yard
- Start a positive behavior incentive program (e.g. “caught being good” tickets)
- Provide opportunities for public recognition (e.g. attendance, positive behavior, “Golden Trash Can” award for cleanest room)
- Collaborate with After School Program to create a “seamless day”
- Start a Breakfast Club to reward attendance
- Promote health & nutrition education & activities

SAP Interventions: Community

- Invite CBO speakers to your SAP to describe programs and referral procedure
- Plan and host a health fair
- Invite your local police (e.g. School Resource Officer, SRO) or fire fighters to shoot hoops/play on the yard with students
- Collect information on resources and services in the community, including providing information on services that are no-cost, low-cost or based on a sliding scale to families and staff
- Connect with community centers and city Parks and Recreation facilities
- Implement business and community mentoring
- Establish a central location to place community resource information
- Enlist the resources of the faith community
- Enlist San Francisco School Volunteers
The interventions, actions and modifications discussed at a SAP meeting are only as good as the follow-up practices that ensure their implementation.

Steps for follow-up:

1) **Case Management**
   A case manager or “contact person” is assigned to each student discussed at the SAP. The case manager’s role is to ensure that the action plan items are implemented. Case manager tasks may include:
   - Meeting with the student and with the teacher regarding the action plan
   - Making phone calls and/or sending reminder notes to team members regarding action items
   - Contacting parents/caregivers regarding the action plan and to enlist their support
   - Setting up meetings on-site with service providers to help bridge the student/family with a particular program or agency

2) **Documentation**
   Action items, or “Action Plans”, are documented for each student and monitored by the SAP. Regardless of the specific method or form used, it is important to document action items/plans and follow-up measures. A SAP binder is a useful tool to maintain a consistent and organized record. Also, see sample SAP agendas, action plan and follow-up form on pages 16-21. The SAP binder should be kept in a confidential location, but known and available to team members.

3) **Feedback to the Referral Source**
   The case manager, or another designated person, provides the referral source with feedback in a timely manner after the initial SAP meeting. It is often beneficial to involve the referral source in some ownership of the plan, particularly classroom strategies, modifications and adaptations, especially if the person had not been involved in the actual SAP meeting that was held.

4) **Student/Family Participation**
   Working with students and parents/caregivers to commit to the plan and to undertake actions on their own behalf is an important part of the follow-up. The student and parent/caregiver have to feel that they have some control over their own goals and plans, and that school staff are their allies, rather than the ones who have all the control.

5) **Follow-Up Discussion**
   Every student discussed at the SAP is reviewed regularly. Many SAP coordinators find it helpful to include a follow-up section on the agenda. During follow-up discussion, the case manager/contact person updates the SAP on the status of the student’s action plan. Additional interventions may be initiated depending on the student’s progress, such as referral for a Student Success Team (SST) or Student Attendance Review Team (SART) meeting, or connection with other school site or community-based resources.
Student Assistance Program (SAP) Best Practices Checklist

Please rate each item using the following scale:
1 = poor  2 = fair/OK  3 = good  4 = excellent

Pre SAP Meeting
- There is a regular weekly meeting time
- A consistent location is established for the meeting
- There is a referral process in place that uses the Request for Referral 1.0
- Staff is aware of SAP purpose and there is “buy-in”
- Each SAP member is committed to providing follow-up activities
- Agendas are distributed at or prior to the meeting
- There is a designated SAP coordinator/facilitator
- Student referrals are elicited from multiple sources, including review of school-wide data:
  - Teachers/Staff
  - Transition Forms
  - DF/U Lists
  - Focal Students
  - SART List
  - Retention Lists
  - Students Lacking Mandated Health Screenings
  - Foster Youth Services (FYS) Census

During SAP Meeting
- At the beginning of the year, Oath of Confidentiality is signed by each member
- Team members are consistent in attending the entire meeting
  Please check those that attend:
  - Administrator
  - Attendance Liaison
  - CBO Representative(s)
  - Dean/Head Counselor
  - Elementary/Middle School Advisor
  - ExCEL ASP
  - Instruction Reform Facilitator
  - LSP or Wellness Coordinator
  - Outreach Coordinator
  - Parent Liaison
  - School Counselor
  - School District Nurse
  - School Psychologist
  - Site Nutrition Coordinator
  - Special Education Representative
  - Others: __________________
- Meetings start and end on time
- There is efficient use of meeting time (e.g. several students are discussed at each meeting, team member discussions remain “on topic”)
- There are designated staff who fulfill roles during the meeting (e.g. facilitator, note taker, timekeeper, etc.)
- Action items from previous meeting(s) are reviewed
- Members participate and share their respective knowledge
- Student information is available at the meeting (e.g. cum folder, attendance records)
- The team is able to solve problems and develop action plans for students
- All team members volunteer to, or are assigned to, follow-up on action items
- The team discusses program issues/needs of the site to identify service gaps and develop new programs (e.g. mentoring, tutoring)

Post SAP Meeting
- Meeting notes are distributed after the meeting
- All Request for Assistance 1.0 Forms, SAP Agendas, and meeting notes are kept by SAP Coordinator/Facilitator in a SAP binder
- Action items are monitored by the SAP coordinator/facilitator and designated case manager
- Action items are completed by assigned/designated team member
- Feedback is provided to the referral source in a timely manner
Student Assistance Program (SAP) 
Best Practices Checklist (continued)

What are the strengths of your SAP?
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________

What are some improvements that need to be made?
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________

For those schools without an SAP, please list the first steps that you think need to be taken in order to start a team. What will be some of the challenges? Who are other support staff that you need to engage in order to start an effective SAP?
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
What is Facilitation?

Facilitation is a way of providing leadership without taking the reins. Your job as a facilitator is to get others to assume responsibility and take the lead.

Core Practices of Facilitators:

- **Stay neutral on content**: Focus on the process. This doesn’t mean that you can’t offer suggestions; it just means that you shouldn’t impose your opinions on the topic to the group.

- **Listen Actively**: Look people in the eye, use positive body language, paraphrase.

- **Ask Questions**: Test assumptions, invite participation, and gather information.

- **Paraphrase to Clarify**: (“Are you saying”, “What I’m hearing you say is…”)

- **Synthesize Ideas**: Get people to comment on what others are saying and build on their thoughts.

- **Identify a Scribe**: Create a visual action plan/ ‘to do’ list to keep group on task.

- **Stay on Track**: Set a time line for the meeting and appoint a time keeper. Use a parking lot to record ideas that are important but not on topic. Label situations if they are sidetracks.

- **Give and Receive Feedback**: Call on people that seem to be disengaged from the process; ask members how they feel the meeting is going or if you are making progress; regularly evaluate the effectiveness of the meeting by eliciting feedback from group members.

- **Test Assumptions**: Bring assumptions out into the open, clarify them, and challenge them.

- **Collect Ideas**: Keep track of emerging ideas and final decisions. Notes should reflect what people actually said and not your interpretation of what was said (see Identify a Scribe).

- **Summarize Clearly**: Summarize to revive a discussion that has come to a halt or to end a discussion when things seem to be wrapping up.

- **Identify Next Steps**: Identify action items, who is responsible and when tasks are to be accomplished.

*Source: Facilitating With Ease, Ingrid Bens © 2000*
### Facilitator Self-Assessment Checklist

<table>
<thead>
<tr>
<th>Behaviors that Help</th>
<th>Behaviors that Hinder</th>
</tr>
</thead>
<tbody>
<tr>
<td>__ listens actively</td>
<td>__ oblivious to group needs</td>
</tr>
<tr>
<td>__ maintains eye contact</td>
<td>__ no follow-up on concerns</td>
</tr>
<tr>
<td>__ helps identify needs</td>
<td>__ poor listening</td>
</tr>
<tr>
<td>__ gets buy-in</td>
<td>__ strays into content</td>
</tr>
<tr>
<td>__ surfaces concerns</td>
<td>__ loses track of key ideas</td>
</tr>
<tr>
<td>__ defines issues</td>
<td>__ makes poor notes</td>
</tr>
<tr>
<td>__ brings everyone into the discussion</td>
<td>__ ignores conflicts</td>
</tr>
<tr>
<td>__ uses good body language and intonation</td>
<td>__ provides no alternatives for structuring the discussion</td>
</tr>
<tr>
<td>__ paraphrases continuously</td>
<td>__ gets defensive</td>
</tr>
<tr>
<td>__ provides feedback</td>
<td>__ puts down people</td>
</tr>
<tr>
<td>__ accepts and uses feedback</td>
<td>__ no paraphrasing</td>
</tr>
<tr>
<td>__ checks time and pace</td>
<td>__ lets a few people dominate</td>
</tr>
<tr>
<td>__ provides useful feedback</td>
<td>__ never asks &quot;How are we doing?&quot;</td>
</tr>
<tr>
<td>__ monitors and adjusts the process</td>
<td>__ tries to be the center of attention</td>
</tr>
<tr>
<td>__ asks relevant, probing questions</td>
<td>__ lets the group get sidetracked</td>
</tr>
<tr>
<td>__ keeps an open attitude</td>
<td>__ projects a poor image</td>
</tr>
<tr>
<td>__ stays neutral</td>
<td>__ uses negative or sarcastic tone</td>
</tr>
<tr>
<td>__ offers suggestions</td>
<td>__ talks too much</td>
</tr>
<tr>
<td>__ is optimistic and positive</td>
<td>__ doesn’t know when to stop</td>
</tr>
<tr>
<td>__ manages conflict well</td>
<td></td>
</tr>
<tr>
<td>__ takes a problem-solving approach</td>
<td></td>
</tr>
<tr>
<td>__ stays focused on process</td>
<td></td>
</tr>
<tr>
<td>__ ping-pongs ideas around</td>
<td></td>
</tr>
<tr>
<td>__ makes accurate notes that reflect the discussion</td>
<td></td>
</tr>
<tr>
<td>__ looks calm and pleasant</td>
<td></td>
</tr>
<tr>
<td>__ is flexible about changing the approach used</td>
<td></td>
</tr>
<tr>
<td>__ skillfully summarizes what is said</td>
<td></td>
</tr>
<tr>
<td>__ knows when to stop</td>
<td></td>
</tr>
</tbody>
</table>

**Additional Observations:**

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

*Source: Facilitating With Ease, Ingrid Bens © 2000*
Sample SAP Meeting Agenda #1

Date: ____ / ____ / ____    Attendees: ____________________________________________

NEW SAP REFERRALS:

<table>
<thead>
<tr>
<th>Student</th>
<th>Grade</th>
<th>Ref Teacher/ GL Counselor</th>
<th>Reason for Referral/Concerns</th>
<th>Contact Person</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Complete SAP Action Plan for each student (see Sample Action Plan, page 20)

FOLLOW-UP ON ACTIVE SAP STUDENTS:

<table>
<thead>
<tr>
<th>Student</th>
<th>Grade</th>
<th>Ref Teacher/ GL Counselor</th>
<th>Reason for Referral/Concerns</th>
<th>Updates &amp; Interventions</th>
<th>Contact Person</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Review SAP Action Plan for each student

SCHOOL-WIDE ISSUES & PROGRAMS:

<table>
<thead>
<tr>
<th>Issue or Program</th>
<th>Updates/Actions</th>
<th>Contact Person</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Next Meeting Date: ____________________

Adapted from John O’Connell High School
Sample content in italics.

Date: ________________  Team members present: ____________________________________________

1. School Attendance Review Team (SART)
   • Review identified students (see attendance log)
     ______________________  ______________________
     ______________________  ______________________
   • Student Advisor (logistics & incentives); Parent Liaison (follow-up)
   • Dog tags and certificates for Sep. 06 perfect attendance breakfast on 10/10/06

2. SST & IEP Meetings
   • 10/10 – 7:30 am ____________  3:00 pm ____________
   • 10/11 – 7:45 am ____________  3:00 pm ____________
   • 10/17 – 3:00 pm ____________  3:45 pm ____________
   • School psych. assessments: completed ____________; underway ____________

3. School-wide Wellness/Planning & Coordination of Programs
   • Mandarin Immersion
   • Mental Health Services & Student Intervention Team (SB1895 Program)
   • Omega Program (Group with Dr. Marshall will be on Tuesdays)
   • Mentor Program (mentor recruitment underway)
   • College Bound / Career Awareness Program (planning underway)
   • School-wide behavior (remind staff to use recognition slips to address common area behavior)
   • “Discipline Gap” – define the issue. Strategies: 1) AA mentors; 2) continue staff discussion; 3) address concerns for identified students; 4) 10/14 lecture by Hilliard

4. Parent Liaison Report
   • PTA
   • Parent Wellness/Education Speakers Series (parents to generate list of ideas)
   • E-script/fundraising (make this a PTA priority)

5. School District Nurse Report
   • Consider “Jump Rope for Heart Program”
   • Status of vision screening follow-up

6. ExCEL After School Program Report
   • Enrollment at: __________
   • “Lights On” October 12th
   • Behavior concerns: ______________________________________

(Case Management on next page)
7. Case Management

<table>
<thead>
<tr>
<th>Student</th>
<th>History</th>
<th>New info/updates</th>
</tr>
</thead>
<tbody>
<tr>
<td>A.C.</td>
<td>New kinder. IEP/ADHD with fetal alcohol/drug exposure and Hx of child abuse until age 3.</td>
<td>Has therapist at Westside Ajani; Afternoon para support; putting together behavior/support plan; IEP 10/11/06</td>
</tr>
<tr>
<td>J.T.</td>
<td>Family Mosaic. Has school-based therapist; meds given at school.</td>
<td>Recd. Dr. consent to provide meds on site. Contacted therapist and case manager about behavior/med. Rxn?</td>
</tr>
<tr>
<td>S.P.</td>
<td>Family moved to Oakland</td>
<td>Transferring to East Bay school, when?</td>
</tr>
<tr>
<td>D.R.</td>
<td>CPS case still active. Has new therapist.</td>
<td>Court date on 9/12. SST held. Behavior support plan 10/10/06</td>
</tr>
<tr>
<td>E.W.</td>
<td>Grief/loss issues. Therapy with intern last year.</td>
<td>Moved to Valencia Gardens; refer to YMCA therapist; need to f/u with mother for med. exam</td>
</tr>
<tr>
<td>D.W.</td>
<td>Grief/loss issues. Therapy with intern last year.</td>
<td>Moved to Valencia Gardens; referred to YMCA site-based therapist.</td>
</tr>
<tr>
<td>J.L.</td>
<td>Foster care. Has therapist. IEP.</td>
<td>Mentor and behavior plan this year</td>
</tr>
<tr>
<td>Z.S.</td>
<td>Emotional/behavioral issues.</td>
<td>Assigned to intern therapist; mentor program</td>
</tr>
<tr>
<td>A.S.</td>
<td>IEP; ADHD; retained 2nd gr.</td>
<td>Met with mother; completed consent for Intern/therapy</td>
</tr>
<tr>
<td>H.F.</td>
<td>Attendance/late arrival issues. Behavior concerns</td>
<td>LSP &amp; teacher have spoken with mother; YMCA therapy underway; SST 10/11/06</td>
</tr>
<tr>
<td>G. F.</td>
<td>Academic concerns, gets frustrated.</td>
<td>Scheduled SST 10/17/06</td>
</tr>
<tr>
<td>E.U.</td>
<td>Learning and attendance issues</td>
<td>Has glasses; testing underway</td>
</tr>
<tr>
<td>K.H.</td>
<td>Transfer from T.I. Medical and behavior issues</td>
<td>Referred to Intern; mentor program</td>
</tr>
<tr>
<td>D.M.</td>
<td>Behavior/emotional concerns</td>
<td>CPS here today; mother told teacher she would like help; started YMCA therapy; mother connected with Instituto by CPS</td>
</tr>
<tr>
<td>A.M.</td>
<td>Significant behavior concerns</td>
<td>On SST list</td>
</tr>
<tr>
<td>S.W.</td>
<td>Mo. Hx of substance abuse; attendance concerns</td>
<td>Home visits x2; attendance has improved; referred to Intern</td>
</tr>
</tbody>
</table>

Adapted from Starr King Elementary School
Sample SAP Meeting Agenda #3

Note: This sample agenda format allows the note-taker to incorporate member attendance, notes about students, new and previously referred, and discussion about school-wide issues. If notes are recorded electronically, the note-taker can sort by student’s last name, by grade, etc.

SAMPLE CONTENT IN ITALICS

Meeting Date: _1-7-07 COMPLETED_ (note “COMPLETED” when distributed to members as final copy)  
Chair: ____________________________

Team members: (names BOLD if present) ____________________________________________________________

Guests:  
Excused: (members who notified coordinator in advance, of absence)

<table>
<thead>
<tr>
<th>#</th>
<th>N or R</th>
<th>Student (Last, First)</th>
<th>Gr</th>
<th>Ref by</th>
<th>Acad</th>
<th>Attend</th>
<th>Beh/E</th>
<th>Health</th>
<th>Other</th>
<th>CP #1</th>
<th>CP #2</th>
<th>ASP</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>R</td>
<td>Smith</td>
<td>7</td>
<td></td>
<td>X</td>
<td>X (out class)</td>
<td>X</td>
<td>AB</td>
<td>3 Ds; 4 Fs; no Us; SST #1: Dec. 6, 06; case discussion at HAC on 1/4/07. Case conf 1/5/07 with Fam Mosaic.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>R</td>
<td>Ramirez</td>
<td>8</td>
<td></td>
<td>X</td>
<td>X</td>
<td>EF</td>
<td>3 Ds, 1 F; no Us. SST #1 10/11/06. Jones created Behav checklist that stu likes. SST #2 to be sched. Move to Smith?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>R</td>
<td>Chin</td>
<td>8</td>
<td></td>
<td>X</td>
<td>X</td>
<td>GH</td>
<td>OR</td>
<td>3 Ds, 1 F; 2 Us SST to be sched. Pending counselor w Beacon or Wellness Ctr</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td>R</td>
<td>Fierro</td>
<td>8</td>
<td></td>
<td>X</td>
<td>X</td>
<td>JK</td>
<td>6 Fs; 5 Us. Was suspended 1/3/07. To have Cslg Conf on 1/9/07 at 11:30 AM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td>R</td>
<td>Jackson</td>
<td>8</td>
<td></td>
<td>X</td>
<td>X</td>
<td>LM</td>
<td>ST</td>
<td>2 Ds, 4 Fs; 2 Us SST to be sched by Jones. In “Top Ten” list. Mom has knee disability.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Glossary:  
N = newly referred in school year; R = student was referred this year already; CP = contact person; ASP = after-school program

Agenda/ Minutes:

- We only have 101 days remaining this school year to make a difference for our students
- Grade level meetings: teachers would like to have admin presence at first half or last half of these meetings...
- Beacon: Starr announced that Vanessa xxxxx will be joining us as of Feb 07.
- PACT: needs parents to complete Intake forms for their CBO
- Admin update: Complete documentation of services for students receiving Care Team services by end of January
- Health update: Hearing/Vision follow-up being done with assistance from site support sub.
- Good news: xxx will return to full-time status at GRD starting Jan. 29.
- School will look at changing breakfast and elective schedules as of second semester. Mtg at 4:15 PM today for staff input.

Adapted from Gloria R. Davis Academy
## Sample SAP Action Plan

**Student’s Name:** ________________________________  **Date:** _________________

**Teacher/Referring Staff:** ________________________________  **Room:** ________________

**Case Manager/Contact Person:** ________________________________

### What?

<table>
<thead>
<tr>
<th>(Action items)</th>
<th>Who? (Person responsible, e.g. teacher, LSP, SDN, etc.)</th>
<th>When? (Date to initiate or complete action item)</th>
</tr>
</thead>
<tbody>
<tr>
<td>❑ Academic counseling</td>
<td></td>
<td></td>
</tr>
<tr>
<td>❑ After School Program</td>
<td></td>
<td></td>
</tr>
<tr>
<td>❑ Group (e.g. anger management, social skills, grief, etc)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>❑ Health review &amp; referrals</td>
<td></td>
<td></td>
</tr>
<tr>
<td>❑ Home visit</td>
<td></td>
<td></td>
</tr>
<tr>
<td>❑ Mentoring</td>
<td></td>
<td></td>
</tr>
<tr>
<td>❑ One-to-one counseling/check-ins</td>
<td></td>
<td></td>
</tr>
<tr>
<td>❑ Parent Teacher Conference (documented)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>❑ Progress Report (daily or weekly)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>❑ Tutoring</td>
<td></td>
<td></td>
</tr>
<tr>
<td>❑ Student Attendance Review Team (SART)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>❑ Student Success Team (SST)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>❑ Other: (further interventions based on student’s needs)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>❑ _________________________________</td>
<td></td>
<td></td>
</tr>
<tr>
<td>❑ _________________________________</td>
<td></td>
<td></td>
</tr>
<tr>
<td>❑ _________________________________</td>
<td></td>
<td></td>
</tr>
<tr>
<td>❑ _________________________________</td>
<td></td>
<td></td>
</tr>
<tr>
<td>❑ _________________________________</td>
<td></td>
<td></td>
</tr>
<tr>
<td>❑ _________________________________</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**☐ Copy to SAP Binder**  
**☐ Copy to Case Manager/Contact Person**  
**☐ Copy to Teacher / Referral Source**
**Sample SAP Case Management/Follow-up Form**

Note: This form is maintained by the SAP Coordinator to document and monitor student concerns, action plans and progress.

(Sample content in italics)

<table>
<thead>
<tr>
<th>Student Name (Grade/Teacher)</th>
<th>Initial SAP Date</th>
<th>Concerns</th>
<th>Interventions</th>
<th>Follow-up Date</th>
<th>Updates</th>
<th>Additional Interventions</th>
<th>Result</th>
</tr>
</thead>
</table>
| Jane Doe (6th/Jones)        | 09/05/06         | Behavior | • Schedule IEP addendum to include behavior goal – Ms. C  
• Classroom observation – Ms. B  
• Enroll in boys group- Mr. S | 09/26/06 | • Mom has signed consent for counseling w/ Mr. R  
• IEP scheduled for 9/29/06 to add behavior plan | Follow-up as needed |
| John Doe (6th/Dun)          | 09/05/06         | Behavior | • Family Mtg. w/ mom re: behavior - Mr. W  
• AB3632 eligible-is mom taking him? – Ms. C | 09/26/06 | • Ms. C met w/mom  
• Ms. C to conduct daily behavior checks and report to mom | Follow-up as needed |
| Jessica Doe (6th/Hop)       | 09/12/06         | Emotional Behavior | • Counseling and HV-Mr. S  
• Possibility of nocturnal asthma -Ms. B | 10/03/06 | • Currently seeing Mr. S for individual counseling  
• Continue w/ counseling  
• Monitor Behavior | Follow-up as needed |

Adapted from Willie L. Brown Jr. College Preparatory Academy
Sample Parent / Teacher Conference Form

Note: Parent/Teacher conferences may be used as an intervention prior to referral to the SAP or recommended as part of a SAP action plan. This sample form offers a guide through a documented conference discussion.

School Name: _______________________________________

Student: ___________________________ Grade: ______________

Parent/Caregiver: ___________________________ Language: __________

Parent Contact Information (telephone #): ___________________________

Teacher(s) participating in conference (name and subject taught):
1) ____________________________________________
2) ____________________________________________
3) ____________________________________________

Strengths?
☐ Asks for help
☐ Attends class every day
☐ Comes prepared with materials
☐ Comes to class on time
☐ Completes homework
☐ Does well on tests
☐ Gets along with other students
☐ Has positive attitude
☐ Is respectful towards adults
☐ Listens well
☐ Participates in class
☐ Solves problems
☐ Thinks creatively
☐ Other: ___________________________

Concerns?
Student needs to:
☐ Attend school every day
☐ Be on time to class
☐ Bring all materials
☐ Remain seated during class
☐ Complete class work
☐ Participate appropriately
☐ Communicate respectfully
☐ Help others as needed
☐ Be positive towards learning
☐ Pay attention, focus
☐ Complete homework
☐ Other: ___________________________

Ideas for parent/student?
☐ 8-10 hrs of sleep; alarm clock
☐ Attend After-School tutorials
☐ Check homework log daily
☐ Clean up backpack/locker
☐ Daily Progress Report
☐ Enroll in an after-school program
☐ Get health check-up & follow up
☐ Get phone #s of study buddies
☐ Healthy breakfast & lunch daily
☐ Obtain counseling: academic/social/emotional
☐ Obtain/meet with adult mentor
☐ Reward small improvements
☐ Student Attendance Review Team
☐ Student Success Team
☐ Weekly Progress Report
☐ Other: __________________________

Comments/Notes
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________

Signatures

Parent/Caregiver: ___________________________ Teacher(s): ___________________________

Student: ___________________________ Date: ___________________________

Adapted from Gloria R. Davis Academy
This document is designed for use by SAP/SST members to remind staff of their obligation to not share confidential information unless given written permission. Each member of a SAP/SST team should sign this Oath of Confidentiality before participating in confidential meetings regarding student(s).

Oath of Confidentiality

I, the undersigned, hereby agree not to divulge or share any information or records concerning any San Francisco Unified School District student, other youth, and/or family members of the greater San Francisco community, without the agreement that information shared in the course of my duties be confidential, and shall only be used for the purpose of developing and implementing services to promote the health and development or to reduce the health risks and problems of students in our schools.

I recognize that any improper discussion of, or release of information concerning a participant to any unauthorized person is forbidden. During the performance of my assigned duties, I will have access to confidential information required for student and family assessments, interventions, and service coordination.

I agree that all discussions, deliberations, records, and information generated and maintained in connection with these activities will not be disclosed to any unauthorized persons.

I agree to the above statement regarding confidentiality.

__________________________________________  _______________________________________
Print Name:                                 Signature:

__________________________________________  _________________________________
Department/School:                          Date: