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Participatory Decision Making

The Inclusion Facilitator's Role as a Collaborative Team Leader

Cheryl M. Jorgensen

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Table 4.1. Competencies reflected in the collaborative team leader role

Assessment of the student and the learning environment

Identifies opportunities for learning and communication in a variety of inclusive environments, including general education classrooms, typical school routines and activities, extracurricular activities, the community, and the home

Assesses students' learning and communication styles, strengths, and needs using a variety of authentic assessment strategies such as criterion-based assessments, ecological inventories, futures planning assessments, and other classroom or typical activity-based strategies

Assesses factors that affect learning and communication, such as the physical and sensory environments, the curriculum, instructional methods, and classmates' and teachers' attitudes

Design of educational programs and supports

Collaborates with others to develop students' educational programs that reflect individualized goals based on the content of the general education curriculum, including 1) subject matter knowledge, 2) literacy, 3) social skills, 4) career skills, 5) community service learning, 6) skills for independent living, and 7) general learning habits and behaviors

Designs and coordinates individualized natural and specialized supports in the classroom, school, and community in the areas of curriculum, instruction, communication, assistive technology, and medical and related services

Supports graduation planning that leads to students' participation in a variety of typical adult roles and inclusive environments such as postsecondary education, work, and community living

Promotes the use of a variety of augmentative communication symbols, modes, aids, and techniques (e.g., letters, words, graphic language symbols, sign/gesture symbols, posture and gaze, communication boards and books, electronic and nonelectronic communication devices) that support students' active participation, learning, and communication in the general education curriculum, during typical school routines, and in the community

Understands the unique nature of communication by students who use augmentative and alternative communication and uses advanced assessment and problem-solving skills to enhance their interactions with others

Demonstrates awareness of appropriate seating, positioning, personal care, eating, and mobility principles, strategies, and equipment and collaborates with others to provide these supports to students

Collaborates with others to secure funding for augmentative communication and other learning aids and assures their optimal functioning through regular maintenance and service

Social relationships

Identifies barriers (e.g., attitudes, educational practices, communication supports, transportation) to the development of students' social relationships and develops strategies for avoiding and/or overcoming them

Facilitates interactions between students with disabilities and their age-appropriate classmates in order to develop, maintain, and enhance social and communicative relationships

Identifies opportunities and facilitates support for students' participation in typical extra- and co-curricular activities, based on students' interests and desires

Positive approaches to behavioral support

Understands the complex interrelationships among behavior, communication, and sensory and movement differences

Conducts comprehensive functional behavior assessments

Designs positive approaches to challenging behavior and supports teams to implement individualized student support plans

Evaluation of learning and communication outcomes

Develops meaningful documentation procedures to evaluate students' learning and communication skills and provides this information for general education and alternate assessment purposes

Evaluates educational programs in order to improve team collaboration, enhance the effectiveness of supports, and maximize student achievement

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sion facilitators respect their colleagues' current understandings, validate their concerns and consider themselves to be fellow learners rather than experts who have *all* the answers.

When acting as a team leader, an inclusion facilitator's job is to help teams work effectively to design and implement practices that lead to quality inclusion and positive learning outcomes for students with significant disabilities. An inclusion facilitator believes in and models the values of inclusive education, has the skills to work with people who oftentimes hold very different sets of beliefs and experiences, and is knowledgeable about current and emerging practices that are effective in inclusive settings. An inclusion facilitator has strong leadership skills but understands that shared leadership and participatory decision making will be most effective over the long term.

DEFINITION, RATIONALE, AND CHARACTERISTICS OF COLLABORATIVE TEAMS

A *collaborative team* is a group of people who 1) coordinate their work to achieve at least one common goal, 2) hold a belief system that all members of the team have unique and needed expertise, 3) demonstrate parity by alternatively engaging in the dual roles of teacher and learner, 4) distribute leadership functions, and 5) employ a collaborative teaming process (Thousand & Villa, 2000). It is the most effective way for teachers and other professionals to work together to support the inclusion of students with significant disabilities. Collaborative teams empower the people closest to a student to make decisions that affect the student, family, and team members. Such teams are based on the maxim that "two heads are better than one" and the idea that student outcomes will be better when people representing diverse viewpoints and skills work together. Service delivery and supports to students are more efficient when everyone buys into decisions and is held accountable for tasks and outcomes.

Effective collaborative teams that work well together have the following characteristics: 1) the team is composed of people with the right constellation of skills related to each student's needs; 2) team members have the optimal level of skill in their profession; 3) team members have high-quality interpersonal and communication skills; 4) team members use effective structures and processes when they meet, such as a standardized agenda, distributed leadership, problem-solving strategies, consensus-building techniques, accountability structures, and conflict-resolution tools; and 5) the team periodically assesses its own effectiveness in relation to how well students are learning (Thousand & Villa, 2000).

Collaborative teams are not simply a group of people who sign the same individualized education program (IEP) once a year. They are complex social units that go through many phases of development, including stages of forming, functioning, formulating, and fermenting (Thousand & Villa, 2000). Teams in the *forming* stage are engaged in the initial trust building and role clarification needed to establish a collaborative team. Healthy teams then move into a second phase called *functioning,* in which members develop the communication and leadership skills that help manage and organize team activities so that tasks are completed and relationships are maintained. The third stage of team development, *formulating,* occurs when team members develop the skills needed to stimulate creative problem solving and decision making and to create deeper comprehension of unfamiliar information. The last stage of team development, *fermenting,* occurs when team members develop the skills needed to manage controversy and conflict, search for more information, and become reflective practitioners.

Table 4.2 depicts the activities that are characteristic of each stage of team development. The inclusion facilitator provides opportunities for teams to develop the skills that compose each level of team performance and helps teams be mindful of their own strengths and needs for improvement.

THE INCLUSION FACILITATOR'S ROLE AS A COLLABORATIVE TEAM LEADER

The inclusion facilitator is responsible for helping teams reach their optimal potential through advocating and modeling effective practices, facilitating decision making, coaching and mentoring other team members, and continuously promoting the team's professional development. The inclusion facilitator should assess each of his or her teams to answer the following questions:

Table 4.2. Activities associated with different stages of team development

Stage	Activities
Forming	Establish group norms. Share background and philosophies. Socialize. Do "getting to know you" exercises. Read about collaborative teaming, and set team learning goals. Adopt meeting agenda and minutes format. Distribute leadership functions and roles.
Functioning	Run meetings efficiently within time limits. Read about collaborative teaming and problem-solving strategies. Complete peer–peer observations. Celebrate together. Attend workshops with other team members.
Formulating	Go to workshops on creative problem solving and teaming. Engage a consultant to do individualized training with teams. Seek feedback on personal communication skills. Evaluate team effectiveness, and develop a plan for improvement. Celebrate together.
Fermenting	Conduct miniseminars for team members in one's area of expertise. Seek training in conflict resolution. Celebrate together. Try new ways to work together. Mediate difficulties through an outside consultant or critical friend. Evaluate effectiveness and plan for improvement.

- Who are the members of this student's team? How are their roles and responsibilities articulated with respect to this student's educational program?
- What are the individual team members' professional skills relative to this student's needs?
- How well does this team work together to plan, implement, and evaluate the student's educational programs? How well do team members solve challenging problems? How do they deal with conflict or discord within the team?
- In what areas do team members need additional professional development relative to meeting this student's needs?
- What professional development does the whole team need in order to improve its work?
- What resources does this team need in order to provide the supports that the student needs?

- How does the team evaluate its own effectiveness relative to student performance (e.g., if the student performs poorly, have the right supports been offered)?

An inclusion facilitator engages in several information-gathering processes to answer these questions. First, he or she asks questions about team collaboration, roles, and the need for professional development as part of a team member interview (see the team member interview questions provided in Table 6.1 of Chapter 6). Second, with input from each team member, the inclusion facilitator develops a list of each person's role and responsibilities. Third and last, the inclusion facilitator observes team members as they work with students or with each other to identify the members' use of promising practices in instruction and collaborative teaming.

When the team's current skills are compared with the promising practices in collaborative teaming, both strengths and needs for improvement will be evident. The remainder of the chapter describes strategies and tools for supporting teams with respect to 1) role clarification, 2) team meeting structures and processes, 3) participatory decision making and problem solving, and 4) conflict resolution.

Role Clarification

General and special education staff who are members of a collaborative team share a number of common roles and responsibilities relative to a student's successful inclusion, including 1) creating a classroom environment in which all students are valued members and participate fully, 2) monitoring and evaluating student learning, 3) creating instructional and assessment materials, 4) developing and implementing student IEPs, 5) delivering student supports, 6) providing individualized instruction, 7) attending team meetings, and 8) engaging in continuous professional development to improve skills related to high-quality inclusive education.

In addition to these common responsibilities, team members have certain specialized roles (see Table 4.3 for a description of the specialized collaborative team roles of general education teachers, special education teachers, paraprofessionals, related-services providers, and administrators). An inclusion facilitator should consider all of these variables in making the decisions necessary to support a collaborative team. Finally, an inclusion facilitator should draft a

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Table 4.3 Specialized roles within collaborative teams

General education teacher
Develops the structure of the class, including general education curriculum, discipline policy, physical layout, and materials
Plans major units of study
Plans daily lessons, activities, tests, assignments, and projects
Develops and implements instruction for all students in the class
Co-supervises paraprofessionals in the classroom
Assigns grades
Special education teacher
Provides modified materials for students with extraordinary learning needs (e.g., books on different reading levels, models, videos or audiobooks, modified tests, assistive technology)
Co-supervises paraprofessionals
Coordinates writing of individualized education programs (IEPs)
Coordinates comprehensive evaluations
Communicates with parents of students with disabilities
Co-teaches in the classroom during whole-class instruction
Provides small-group and one-to-one instruction
Paraprofessional
Follows classroom policies that are developed by the general education teacher
Carries out instructional plans and modifications developed by the team
Provides support in a way that promotes students' independence, interaction with other students, and overall membership in the classroom
Teaches the whole class, small groups, or individuals under the supervision of the classroom teacher
Facilitates direct conversation and interaction between students with and without disabilities
Prepares instructional materials under the direction of the classroom or special education teacher
Participates in team meetings
Related-services provider
Provides support to students with disabilities to enable them to participate in the general education curriculum
Writes goals and objectives that are directly related to learning and membership in the general education classroom
Participates in team meetings
Provides in-class support to enable students to better participate and learn in the general education classroom
Trains other staff to implement related-services goals to promote carryover and generalization
Works with small groups of students with and without disabilities
Uses a block-scheduling format to facilitate in-class service delivery

team role matrix that depicts each team member's role, modify it based on members' feedback, and then use the final matrix as a referent when there is confusion regarding any person's role on a particular student's team.

Team Meeting Structures and Processes

Effective meetings are those in which the right people are present, the meetings' purposes are clear, important information is shared, new ideas are discussed, problems are solved, and accountability to tasks and outcomes is monitored. Effective and efficient collaborative teams use a number of structures and processes for managing their meetings, including 1) being clear about the purpose of a meeting, 2) using a standardized agenda format, 3) distributing leadership roles among team members, and 4) using accountability structures for tasks and outcomes.

Meeting Purposes An efficient team meeting starts with the right people being present for the purpose at hand. Some teams designate three different types of meetings with different members attending each. IEP meetings are formal legal gatherings that require the attendance of all team members, including the student (if middle-school age or older), parents or guardians, general and special education administrators, classroom teachers, special education teachers, related-services providers, and paraprofessionals. Case management meetings are often defined as meetings to discuss services, staff assignments, financial issues, or other administrative tasks and are attended by the inclusion facilitator, case manager, and/or special education teacher. Some schools designate different staff to fulfill the roles of case manager and special education teacher. In others, the same person fulfills both functions.

At instructional planning meetings, teams discuss upcoming lessons, instruction and assessment, materials and assistive technology, other student supports, and the roles of each team member within particular lessons or activities. The classroom teacher, inclusion facilitator, case manager and/or special education teacher, and paraprofessional typically attend these meetings. Related-services staff can attend these meetings on a periodic basis, particularly to discuss augmentative and alternative communication or any other assistive technology supports necessary for students to gain access to the general classroom environment and curriculum. No matter what the purpose, team meetings should be considered as sacred planning time to be interrupted only by true emergencies.

Standardized Agenda A standardized team meeting agenda, which may be customized to suit each team's purposes and style, is provided in Appendix C. Regardless of the agenda format that is

used, time needs to be carefully managed. Careful notes are taken for record keeping, communication, and accountability purposes, and to-do tasks are reviewed regularly.

Distributed Leadership Roles Even though an inclusion facilitator is the designated or assumed collaborative team leader, there is research to suggest that distributing leadership roles periodically improves effectiveness and efficiency and builds the skills of all team members (Thousand & Villa, 2000). The roles that are typically rotated include facilitator, recorder, and timekeeper.

Accountability Structures for Tasks and Outcomes Without an accountability structure, it is likely that many good ideas may never be implemented because of people's busy schedules and multiple responsibilities. Every team meeting should end with a review of the to-do list items, identifying the task to be completed, the name of a single individual who is responsible for making sure the task is completed, and a date by which the task will be completed. One of the easiest and most effective ways to assure that items on the to-do list are accomplished is for the inclusion facilitator to ask, "So, Cheryl, when will you be able to begin that task?" and for the team member to enter into a datebook a specific day and time when the task will be started as well as a notation of when it must be completed.

Participatory Decision Making and Problem Solving

To be effective, an inclusion facilitator must understand collaborative teaming processes, including how groups function and how different facilitation strategies can be used in the right situations. An inclusion facilitator must also be able to teach other team members the value of learning and using systematic collaborative teaming processes. Although there are many teaming and group work models, participatory decision making is a model that is particularly responsive to the characteristics and challenges of education teams and school culture (Kaner, 1996).

Participatory decision making, under the guidance of a skilled facilitator, has probably been used for thousands of years by native Americans and Alaskans and peoples in the Middle East, Far East, and Africa! Beginning in the 1960s, groups of people who were united for social changes (e.g., civil and women's rights, environmentalism) adopted participatory decision-making values and began

to hone specific techniques and strategies for planning community and organizational change. Kaner (1996) characterized participatory decision making by four principles:

1. Full participation by everyone in the group
2. Commitment to building a shared framework of understanding
3. Work toward inclusive solutions
4. Shared responsibility for implementation

Today, varieties of participatory decision making are used by large, for-profit corporations to tap into the intellectual talents and energies of all their employees, as well as by local neighborhoods that want to improve their quality of life through health, education, environmental, safety, cultural, or housing initiatives. The school reform movement began to apply some of the lessons about change learned from the broader community and the business world by incorporating the work of Garmston and Wellman (1999), Kaner (1996), and Senge, Cambron-McCabe, Lucas, Smith, Dutton and Kleiner (2000) into their continuous improvement and professional development activities.

When schools use the principles of participatory decision making, every committee or team member participates, not just a vocal few. Members draw each other out with supportive questions such as "Is this what you mean?" and refrain from talking behind each other's backs. A problem is not considered solved until everyone who will be affected by the solution understands the reasoning behind the solution. Participatory decision making takes more time than conventional group decision making, but the hours of time originally spent are saved later by avoiding the misunderstandings, false assumptions, and hard feelings that often occur when a team is working at cross purposes (Kaner, 1996).

According to Kaner, in contrast to decision making by conventional groups and means,

> [Participatory] decision-making remains the best hope for solving difficult problems. There is no substitute for the wisdom that results from a successful integration of divergent points of view. Successful group decision-making requires a group to take advantage of the full range of experience and skills that reside in its membership. This means encouraging people to speak up. It means inviting difference, not fearing it. It means struggling to understand one another, especially in the face of the pressures and contradictions that typically drive group members to shut down. In short, it means operating from participatory values. (1996, p. xiii)

When inclusion facilitators model and teach these participatory values and use the tools associated with group decision making, more sustainable agreements are made, people enjoy working with one another, and, ultimately, students benefit from the improved productivity of their education teams.

Participatory Decision-Making Fundamentals for Inclusion Facilitators The role of any facilitator is to support everyone to do his or her best thinking. If a school team has a talented, dedicated, and outspoken occupational therapist and a talented, dedicated, and quiet speech-language pathologist who never voices her opinion, that team may not operate to its greatest potential. If the task assigned to IEP teams was to simply share information, then a skilled facilitator might not be needed. If students with significant disabilities had educational issues that were easy to figure out, then teamwork would not be as essential.

Instead, the IEP team members have a challenging task in front of them. They must seek to understand how a student learns when he or she cannot communicate well. They must decide what is most important to teach him or her from among hundreds of possible general education and individualized learning goals. The team must reconcile the varied philosophies and histories of its team members and develop a sustainable agreement about how best to teach and support the student. It must continually integrate new information from research and practice into its working repertoire and engage people outside the team to actively support its work. Even the most congenial team members who have known each other and worked together for years often need someone to help them through these challenges.

To promote effective group functioning, Kaner (1996) suggested that facilitators need a set of fundamental and advanced skills related to building sustainable agreements. Fundamental facilitation skills include

- Listening
- Facilitating open discussions
- Using alternatives to open discussion
- Using chart-writing techniques
- Brainstorming
- Managing long lists
- Dealing with difficult dynamics
- Designing realistic agendas

Although each of these skills is important and will be used by inclusion facilitators in many different group situations, two merit more in-depth discussion: facilitating open discussion and dealing with difficult dynamics. These skills are then used to help teams reach sustainable agreements.

Facilitating Open Discussion Facilitating open discussion is much more involved than simply posing a question or suggesting a topic and then waiting for everyone to weigh in on it. The facilitator's role is to monitor the speakers, ensure full participation, focus the discussion on topics of most interest, and decide when it would be helpful to switch to a different and more effective way of addressing a topic or issue (e.g., working in smaller groups or using a problem-solving technique; Kaner, 1996). Open discussion in team meetings is important because members often bring issues to the table that call for different perspectives.

When the goal of open discussion is for every team member to understand each other's viewpoint, a facilitator has several tools at his or her disposal. The first commonly used strategy is *stacking,* in which a facilitator explicitly determines the order in which people will speak by saying, "Debra, you go first, then Leigh, and then Jeff." This technique is particularly effective when one team member dominates the conversation by commenting after every other person speaks. This stacking technique communicates, "Everyone will have a turn, but people do have to wait a while before speaking again."

Another technique, called *using the clock,* encourages participation by everyone within a limited period of time. To employ this technique, the facilitator may say, "We have 10 minutes for everyone to weigh in on this issue, and then we'll need to move on to our next topic."

When a team is discussing complex issues such a student's challenging behavior, other techniques known as *calling for themes* and *reframing* can help the group begin to make sense of many streams of thought and prepare to do more convergent thinking. The facilitator might say, "Everyone has shared an anecdote about Philip's behavior from the classroom, the cafeteria, the playground, and the bus. What themes do you hear coming up again and again?" After listening to a few suggested themes, the facilitator might then reframe the conversation by saying, "Now that we have all shared our stories and talked about our theories about why Philip is having such a tough time with transitions, let's go back to our original three questions: What does Philip seem to be communicating? Which of our supports seem to be working well? and What other

messages might we put on his communication device to enable him to communicate more effectively in those situations?"

Dealing with Difficult Dynamics It may be more helpful for inclusion facilitators to view troublesome meetings as representing difficult dynamics rather than involving difficult people (Kaner, 1996). When one person on a team becomes viewed as being difficult, polarization occurs and the inclusion facilitator spends time and energy trying to figure out how to silence that person rather than thinking about how the team could work more effectively.

When difficult dynamics arise, it is almost always a result of the team not having established norms for communication and meeting processes. The three most typical difficult situations would include those in which 1) one individual dominates the discussion, 2) one individual becomes strident in his or her views and is not willing to compromise a position, or 3) one of more people are lax about following through on assignments. All of these situations can be addressed through improved initial agreements about how the team will communicate in meetings, how agendas will be developed and followed, and how decisions will be made.

Even when agreements and norms have been reached, teams may encounter problems on occasion. For example, one person might dominate a particular conversation. An effective facilitation technique in this situation is for the facilitator to invite participation from others who are not talking instead of merely asking that person to stop speaking or announcing that his or her time is up. Likewise, when two people in a group are carrying on a lengthy back-and-forth debate, the facilitator's most effective intervention is to invite others to weigh in on that same issue. If one group member becomes strident about a point of view or issue—refusing to give up his or her advocacy stance—the facilitator's job is to ensure that the person feels heard by each member of the group and to ask the group to step back from the situation and review its previously agreed-on rules for making decisions (Kaner, 1996).

How to Reach Sustainable Agreements Inclusion facilitators need to know how to coach and support diverse team members to build sustainable agreements. Kaner (1996) suggested that facilitators need five skills to reach this goal, which include the ability to

1. Gather diverse points of view
2. Build a shared framework of understanding

3. Develop inclusive solutions
4. Strive toward unanimity
5. Reach closure

Gather Diverse Points of View During the first stages of group decision making, open discussion is often an effective means of drawing out all of the members' viewpoints. This stage of divergent thinking is necessary and avoids moving too quickly or thoughtlessly into a solution that might not be fully supported by all team members. Once a problem has been well described, members' individual viewpoints shared, and possible solutions generated, however, one of two things generally happens. In the rare instance in which everyone agrees with one possible solution, the team then moves to planning the action steps associated with that solution. Although this scenario describes the ideal, it is much more likely that differences of opinion will surface and the group will struggle a bit toward unanimity and closure. This is the situation in which an inclusion facilitator's help is most needed.

Build a Shared Framework of Understanding As a collaborative team leader, an inclusion facilitator's job during this period of struggle and confusion is to help team members create a shared context that leads to greater understanding and to strengthen interpersonal relationships on the team. For example, if one team member thinks that a student needs to go outside the general education class to receive instruction because the student is too distracted in the classroom and another team member has seen the student working productively in the classroom, then these individuals need to experience and understand the context within which these opinions were formed and are being held. The inclusion facilitator has several tools at his or her disposal to promote shared context. One way to share another person's context is to role-play being that person. Kaner (1996) called this the *If I Were You* activity. In this activity, the inclusion facilitator suggests a starter sentence, such as "If I were you, I would think that a legitimate reason for pulling a student out of class is . . ." or "If I were you, I would think that the most important rationale for inclusion is . . ." Taking turns, each person in the group looks to a colleague and completes the starter sentence. After the first person finishes the sentence, the person being addressed either agrees with, clarifies, expands, or corrects the statement. This process continues with the whole team. At the end

of the activity, the facilitator asks questions that continue to promote shared understanding, such as "How do our perceptions of one another's viewpoints influence our work together?" and "How might we avoid reading one another incorrectly?"

Develop Inclusive Solutions After team members have a shared understanding of the issues and perspectives of other team members, the inclusion facilitator coaches the team to focus on needs instead of positions or solutions. This strategy is central to mediation and conflict resolution and can be very helpful when an argument seems to be going around in circles (Fisher & Ury, 1983). In this situation, one team member may say, "John really needs to leave the classroom when he begins to make noise," to which another member may respond, "We need to support John to stay in the classroom." The facilitator should coach these individuals to list their needs pertaining to this situation. Once the individuals articulate needs such as 1) a learning environment in which students can concentrate well enough to do their work, 2) a classroom in which every child feels welcome, 3) a means for John to communicate his needs more effectively, and 4) a way for a particular classroom teacher to signal that she needs more help during a stressful time, then the inclusion facilitator can help the group design a solution that meets this broad range of needs (Kaner, 1996).

Strive Toward Unanimity After team members have explored an issue and are sure that they understand one another's points of view, the inclusion facilitator's job is to support them to explore possible solutions and develop a sustainable solution to the problem. When those solutions are elusive, teams need to think "outside of the box" and come up with creative solutions that meet most people's needs. Kaner (1996, p. 187) listed several "out-of-the-box" solutions that should be explored by inclusion facilitators when teams get stuck. These include

- Creating more interdependence between the alternatives (e.g., you cut and I choose)
- Shifting from solutions to needs
- Questioning ideas that have been labeled impossible
- Dividing a problem into independent parts and solving each separately
- Searching for resources from unusual sources

- Finding out how others have solved a similar problem
- Challenging fixed assumptions about the ways things have always been done
- Negotiating for more time

One strategy that has been very useful in the inclusive education field is examining case studies to learn how others have developed novel solutions to similar problems. Although the particular solutions developed by others may not offer the exact prescription needed for a school, an inclusion facilitator can coach team members to analyze how others have creatively reframed their problem or designed creative solutions. When team members take a break from thinking about their own dilemma to read about and discuss successful solutions found by others, their own creativity may be primed for returning to their problem with a fresh perspective (Kaner, 1996).

Once a proposed solution is on the table, many teams do not have explicit rules for deciding whether they will adopt the solution or idea. Kaner suggested that groups use a gradient of agreement scale for testing group support for a proposal. Table 4.4 describes the six points on this scale and what they mean. The degree of support for a proposed solution or idea determines whether the inclusion facilitator supports the group to keep wrestling with the issue until greater agreement is reached. The need for enthusiastic support is affected by many factors, including whether the stakes are so high that the consequence of failure would be dangerous, the reversibility of a decision, the number of people who will be affected by the decision, and the dedication required of group members to implement the decision (Nutt, 1992). For example, if a proposal about the color of the tablecloth for the holiday party does not have strong support, the consequences may be minor if an unpopular decision is implemented. In contrast, if a pro-

Table 4.4. Levels of agreement among team members

1. I can say an unqualified yes to the accuracy of this information.
2. I find the summary of the information acceptable.
3. I can live with the summary of this information, but I'm not enthusiastic about it.
4. I do not fully agree with the summary of this information and need to register my view about it. I do not, however, choose to block the process. I am willing to support the team's acceptance of this information because I trust the wisdom of the group.
5. I do not agree with the summary of this information and cannot support moving forward until greater agreement is reached.
6. I feel that we have no clear sense of unity in the group. We need to do more work before consensus can be reached.

Source: Kaner (1996).

posal about restructuring job descriptions does not have strong support but is implemented, the consequences might be disastrous.

Reach Closure Finally, productive group decision making ends when five steps have been completed:

1. The discussion has ended.
2. The proposal has been stated.
3. Team members have been polled.
4. The group's decision-making rule has been used to reach a final decision.
5. The action plan that has been developed specifies responsibilities and timelines for implementing the decision.

The final decision can be made by a particular level of agreement, by a majority vote, by a person in charge, or even by a flip of a coin! The group must acknowledge how the final decision will be made. In some cases the group itself can set its own decision rule and in other cases someone higher up on the organizational hierarchy may make the decision by fiat.

Conflict Resolution

Few teams operate smoothly without occasional conflict, and manageable conflict within teams can lead to new learning and growth. When conflict gets in the way of providing a quality education to a student or destroys personal relationships, however, intervention is necessary. Team dynamics that can be disruptive include 1) entrenched communication habits such as interrupting, bullying, or monopolizing; 2) the development of team subgroups that sabotage team decisions; and 3) conflicts that go unresolved.

Effective Communication Skills An inclusion facilitator needs to support his or her teams to set group norms for communication, model effective communication, and coach individuals who have difficulty learning and using the skills. Table 4.5 depicts skills and tasks that assist effective communication. An inclusion facilitator can create opportunities for team members to use and practice the skills described in Table 4.5 by such means as 1) promoting self-reflection through diaries or journals, 2) using outside observers to give feedback, 3) creating audio- or videotapes that can be reviewed, 4) setting individual behavioral goals, and 5) rotating group roles frequently.

Table 4.5. Communication skills and task functions

Communication skills
Paraphrasing
Describing others' behaviors
Listening actively and reflectively
Using inviting body language
Checking impressions
Maintaining eye contact
Criticizing ideas, not people
Never interrupting
Respecting others' contributions
Task functions
Initiating
Seeking opinions
Clarifying
Summarizing
Reaching a consensus

When individual team members persist in using ineffective or disruptive communication methods, an inclusion facilitator has some choices about how to handle the situation. He or she can simply ignore a particular behavior and hope that it will diminish if it does not get the desired reaction. Alternatively, the inclusion facilitator can use humor to deflect the ineffective or inappropriate communication; can speak with the individual in private and coach him or her into improved communication; or, as a last resort, can ask an administrator to mediate with the team.

Principled Negotiation Conflict resolution is a participatory problem-solving process in which the goal is *both/and solutions* rather than *either/or solutions* (Fisher & Ury, 1983). When there are differences of opinion on a team, two or more people may enter into negotiation with one another to advocate for their own point of view. *Negotiation* is back-and-forth communication designed to reach an agreement when two sides have some interests that are shared and others that are opposed. Although negotiation takes place every day, it is not easy to do well. Standard strategies for negotiation often leave people dissatisfied, worn out, or alienated—and frequently all three.

Table 4.6 depicts a fairly common stalemate that occurs when one person on a team wants a student included and the other disagrees. In this scenario, the special educator is arguing for inclusion, the classroom teacher is resistant, and neither side is really listen-

Table 4.6. Sample inclusion debate

Inclusion facilitator says...	Classroom teacher says...
We'd like Jason to be fully included in your fifth-grade class all day long.	I can't imagine how he could benefit from the fifth-grade curriculum.
He needs to feel a sense of belonging. We can figure out how he can participate in all of your lessons and what his priority learning objectives are.	There might be some times of the day, like when we have buddy reading, when he could come in for a little while.
I think we need to be careful about partial inclusion. What message does that give students about the value of students with differences?	I'm not so concerned about the messages that we give kids but rather what it is that they learn. I just can't see how he could benefit when I can't even understand what he says.
There are many benefits to Jason being in your class. A sense of belonging, learning to interact with classmates in an appropriate way, opportunities for Jason to practice his communication skills in real-life situations, and so forth.	Wouldn't he just be better off working on the kinds of skills he'll need once he gets to be an adult, like getting dressed in the morning, cooking, doing his laundry, and so forth?

ing to the other. From all outward appearances, they have no common interests; the chances for them to come to some mutually agreeable decision or plan seem remote. The scenario represents the most common form of negotiation: *positional bargaining.* This type of negotiation is generally ineffective because it fails to meet the three criteria of effective negotiation:

1. The process should produce a wise agreement if agreement is possible.
2. The process should be efficient in terms of time and effort.
3. The process and outcome should improve or at least not damage the relationship between the parties.

As more attention is paid to each party's position, less attention is devoted to meeting each person's underlying concern. Under these circumstances, agreement becomes less likely. Any agreement reached under these circumstances may reflect a mechanical splitting of the difference between the final positions rather than a solution carefully crafted to meet the legitimate interests of the parties.

This kind of negotiation takes a lot of time and actually creates incentives that stall settlement. People start at extreme positions, hoping that frustration or boredom will bring the other party closer to their bottom-line position. Ultimately, this type of negotiation becomes a contest of will. Anger and resentment build up. The chance for an agreeable settlement is small.

The alternative to positional bargaining is principled negotiation. *Principled negotiation* calls on teams to decide issues on their merits rather than through a haggling process focused on what each side says it will and will not do. It suggests that teams 1) separate the people from the problem; 2) focus on interests, not positions; 3) generate a variety of possibilities before deciding what to do; and 4) base the final solution on some objective standard. The steps in principled negotiation are described next.

Understand the People Involved An effective inclusion facilitator understands that all parties to a negotiation are people first. This means that they have emotions, deeply held values, experiences, and interests that may conflict with their desire or ability to come to an agreement. Most negotiators have two interests: the substance and the relationship. Because most negotiations take place within an ongoing relationship, it is important to carry on each negotiation in a way that will help rather than hinder future relations and future negotiations.

If the primary problem between the negotiators is their relationship, then the skilled inclusion facilitator will deal directly with the people problem and not naively think that the disagreement is simply about the substance of the issue. In a situation in which the problem is mostly about the individuals' relationship, their feelings may be more important than what is said. The inclusion facilitator should acknowledge the individuals' feelings, allow them to let off steam, and refuse to overreact to emotional outbursts.

Reconcile Interests, Not Positions By the time people are in a negotiation, they may have clearly stated their positions but perhaps not so clearly stated their interests. In the example depicted in Table 4.6, for example, the inclusion facilitator's interest may be for the student with disabilities to feel a sense of belonging with his classmates. The classroom teacher's primary interest may be knowing the academic goals of the student in her classroom and her responsibility to help the student achieve those goals. An effective inclusion facilitator should ask about each person's interests and gently guide team members to separate their interests from their positions.

Brainstorm Options for Mutual Gain People involved in a dispute usually feel that they already know the right answer, yet a key to arriving at a mutually satisfying solution is the ability to generate and consider many possible solutions. Here is where the leadership and experience of the inclusion facilitator can help by con-

Table 4.7. Possible criteria for measuring the impact of a negotiated solution to a conflict about inclusive education

Student's performance on assessment tests, reading tests, and observational measures
Student's acquisition of skills and knowledge
Student's increased time spent with kids without disabilities
Student's increased ability to follow classroom routines and rules
Student's improved health
Student's increased participation in class
Efficiency of time, space, staff, and effort
Cost–benefit ratio
Nondiscrimination or equal treatment
Following the requirements of federal, state, or local laws, policies, or regulations
Following a generally accepted moral standard
Following or supporting a school's mission statement
Following precedent
Following tradition
Following a practice supported by the professional research
Following professional standards
Following what a court would decide

vincing the opposing sides to separate brainstorming from decision making and persuading them to use techniques that expand the options under consideration. Team members may need strong leadership from the inclusion facilitator to move beyond their individual interests to make a list of common or shared interests.

When the parties are ready to articulate their proposed solutions, the role of an inclusion facilitator is to suggest that agreements other than "all or none" scenarios are possible. For example, each party may get some of his or her interests met in a particular solution. Alternatively, the parties might try a particular solution for a predetermined period of time, gather data on its impact, and return to the table to reconsider the original decision.

Determine Objective Criteria The last step in the principled negotiation process is for the parties to establish objective criteria by which the final decision will be evaluated. They might choose from among the criteria depicted in Table 4.7.

CONCLUSION

Milton Olson wrote a short parable called "A Lesson from the Geese" that speaks to the power of teams in making a difference:

> As each bird flaps its wings, it creates an uplift for the bird following. By flying in a "V" formation, the whole flock adds 71% flying range than if each bird flew alone. Lesson: People who share a common direction and sense of community can get where they are going quicker and easier because they are traveling on the thrust of one another. (1988)

Olson's parable is a powerful reminder that as a team leader, an inclusion facilitator has not only personal professional knowledge and resources to draw on but also the knowledge and resources of his or her teammates.

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5

Facilitating Student Relationships

Fostering Class Membership and Social Connections

Cheryl M. Jorgensen

Once the strong collaborative teams discussed in Chapter 4 are in place, an inclusion facilitator can turn his or her attention to helping the teams plan, implement, and evaluate high-quality, inclusive educational programs for students with disabilities. Many special education textbooks and curriculum guides recommend that the first step is to conduct a comprehensive assessment of students' current levels of performance, incorporating information from past evaluations. This book proposes a very different place to start, suggesting instead that the first step should be to enhance students' social relationships within the classroom, school, and community. Unless students are included and have friends, the best individualized education programs in the world will not lead to desired quality-of-life outcomes for the students.

Social relationships contribute to a good quality of life for students with disabilities in many ways. Having friends confirms a person's sense of belonging and is a necessary foundation for the achievement of self-actualization (Maslow, 1954). People with disabilities who do not have friends are lonely, isolated, and less likely to be a part of the community. To imagine that people with disabilities could have a full life surrounded only by professionals is to categorize people with disabilities as "others" rather than to understand their common humanity. We need only plot our own circle of friends

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to realize how empty our lives would be if we only interacted with our dentist, our doctor, our plumber, and our boss! For school-age students in particular, membership in a social group defines whether children are accepted or marginalized.

In her study of American high school students, Chang found that

> An individual's social status was often determined on the basis of clique affiliation, types and degrees of involvement in activities, appearance, and academic performance. . . . [P]opular cliques included . . . athletes, brains, pretty faces, and good bodies, who tended to be "high" class. Those classified as "unpopular" included smokers, [the tough kids], and special education students, who were often regarded as "low" class people. (1984, p. 169)

Supporting students to develop social relationships forces educators to go to the heart of the meaning of inclusion. Carol Tashie, a former project director with the Institute on Disability at the University of New Hampshire, used to say that a person could distinguish between a noninclusive school and an inclusive one when students with disabilities were "with" their classmates, not simply "in" a regular class (C. Tashie, personal communication).

ESSENTIAL CONSIDERATIONS FOR FRIENDSHIP

The best way to support a student's development of a wide circle of social relationships is not to announce on the first day of school, "Jamie needs friends. Who wants to volunteer?" Instead, the important thing is to ensure that the essential considerations for friendship development are solidly in place.

Martin, Jorgensen, and Klein (1998) defined seven essential conditions for friendship: 1) fully including students in a heterogeneous general education class, 2) providing students with a means to communicate all of the time, 3) providing support in a way that encourages interdependence and independence, 4) involving students in problem solving to remove barriers to social relationships, 5) giving students access to age-appropriate materials and activities, 6) forging a partnership between home and school to facilitate friendships and participation in social activities, and 7) addressing the climate of the whole school with respect to diversity. A possible eighth essential prerequisite for encouraging students with disabilities to make friendships is to treat all students as if they are competent. Unless these eight conditions are met, the facilitation of social relationships will not be addressed or will take on a low priority within the team, and

there is a real risk that the relationships between students with and without disabilities will be based on benevolence rather than equity (Kunc, 1992). Each of these conditions makes a unique contribution to a student's membership; if each is not present, the chance that friendships will develop is significantly decreased.

Fully Including Students in a Heterogeneous General Education Class

Imagine that you work for the Acme Widget Company. There are 100 employees in your building, located on four floors of the company's headquarters. You, however, are not assigned to marketing widgets but rather to marketing gizmos. Your boss tells you that marketing gizmos is an honorable profession and that you are a valued employee.

When the marketing team meets on Monday morning to talk about the latest widget advertising campaigns, you are in your basement office thinking about how to get people to buy your gizmos. When you come up to the employee lounge for a coffee break, everyone is talking about the new widget marketing strategy, but you cannot really contribute because you were not part of that discussion. They have a laugh over a mistake that the team leader made when giving her report, and you laugh along just so that you will not stand out. When you strike up a conversation with a co-worker about the latest gizmo you are working on, she looks at you blankly, says, "Good job, Henry. Sounds like you are really going to town on those gizmos," but then turns to another colleague and continues the widget discussion.

At lunchtime, you go through the line to get your meal and look around for someone to sit with. The widget teams are scattered throughout the lunchroom, and you join the nearest table. During lunch, the talk is of people's home lives, families, romances, and the baseball game that the widget team went to last weekend. You jump into the conversation to share a story about the softball game in which you played as a member of the Special Gizmo Softball League, but because the widget makers were not at the game, your vivid description of the great catch you made falls flat.

At the company's annual banquet, the president shows slides of the company profits that have soared because of the hard work of the widget teams. Toward the end of the evening, you are called up to the podium and receive an award for most-improved gizmo marketer. The audience applauds, but somehow the praise is hollow.

This not-so-funny scenario parallels what happens to students with disabilities when they are only partially included in the mainstream of general education, working on different goals, pursuing different leisure activities, and not sharing in the hidden curriculum that provides students with the opportunity to learn what it really takes to become a regular kid in the school (Apple, 1979). Because students do not feel part of the class and have fewer common learning and social experiences with their classmates, they are outsiders for all intents and purposes.

Conversely, when students with disabilities are full-time members of general education classes and typical school social activities, they have a common set of experiences on which to base not only conversations but also relationships. The role of the inclusion facilitator is to teach others that students' social relationships are as valuable as their learning of math or history (Strully & Strully, 1996).

Jeff Strully (2003) illustrated how the importance of social relationships grows with each passing year when he shared his worries as a parent of a young adult with significant disabilities:

> *I'm 55 years old now, and Shawntell is 31. When I wake up in the middle of the night, wondering what will happen to Shawn when I am no longer here, I don't say to myself, "If only I had taught Shawn to tie her shoes. If only she had learned to read or balance her checkbook." I worry, "What if Shawn is lonely? What if she has to live in a group home with a bunch of strangers? What if she no longer sees the friends she has made who live all over the U.S.?" Then I realize what I need to spend my energy on . . . helping Shawn become fully a part of her community and building a network of friends and acquaintances who will be there even when I am gone.*

Providing Students with a Means to Communicate All of the Time

When students with disabilities have a means to communicate, they are more likely to gain a wide variety of social relationships that last over time. Although Mark's story does not have a happy ending, it is an excellent illustration of this reality. Mark was a high school student with significant disabilities who had been in self-contained classrooms throughout his school career. After attending a conference on inclusive education, his team worked hard to include him in

the mainstream of the general education classroom, but without a means to communicate, his participation was limited to tasks such as setting up the science equipment, doing ready-made art projects, listening during lectures and small-group discussions, and being an observer most of the time. After the team introduced facilitated communication to him, he soon began communicating about the subject matter being taught, social topics, and his feelings.

One of Mark's friends related the change that he saw in Mark once he began communicating in a more conventional way. He said, "This year I have finally noticed a huge change in Mark's personality. He has become a lot calmer and a lot easier to talk to. Some of the best times of my life are . . . just talking to him one on one."

With Mark's expanding communication, his behavior improved radically. He stopped hurting himself and scratching others. He began participating more in his classes. He even went on a 5-day trip with several other boys and teachers to present at a national conference on inclusive education. At the conference hotel, the boys stayed up late ordering room service and watching forbidden movies on the pay-per-view channel.

Unfortunately, Mark's emergence as a communicator did not last. During the mid-1990s, some researchers in the fields of special education and augmentative communication challenged the authenticity of facilitated communication (Biklen & Cardinal, 1997). Administrators in local school districts were put in a very difficult position. On one hand, they knew that many of their students had experienced success with it; in Mark's case, for example, the improvements in his learning, behavior, and social connections were dramatic. On the other hand, they were worried about the possible legal ramifications of using an educational method that did not have the sanction of the professional organizations that licensed or certified their staff. A decision was made to explore other augmentative communication methods (that did not work out so well in Mark's situation) instead of providing Mark with the level of physical support he had been receiving. After Mark's behavior worsened, rules were put into place that kept him away from close contact with other students. Not surprisingly, his social relationships suffered.

The purpose of telling Mark's story is not to blame Mark's school, for it could have faced serious legal and even financial problems if the school's administrators had chosen to go against the recommendations of respected professional organizations. The story is meant instead to illustrate how important communication is to students with disabilities.

Providing Support in a Way that Encourages Interdependence and Independence

Although most students with significant disabilities require specialized support from an adult at some point throughout their day, a commitment to relying first on natural supports brings students together. Martin et al. (1998) provided numerous examples of effective natural peer and adult supports for 10 different types of activities, including transitions, teacher-directed lessons, cooperative group activities, individual seatwork, personal hygiene routines, and extracurricular activities.

An inclusion facilitator must be vigilant about the balance between specialized and natural supports. An inclusion facilitator can assess the natural opportunities for student interactions throughout the day and then work with a student's team to plan for capitalizing on those opportunities. Sometimes, all that needs to be done is to instruct the paraprofessional to back away from the student to offer him or her the chance to do the activity independently or to make room for another student to assist.

Criteria for using natural supports in a way that is respectful of all students include 1) honor the students' preferences about the nature of the support, 2) ensure that students with disabilities have opportunities for relating to other students outside of formal peer–support relationships, 3) arrange for students with disabilities to have opportunities to provide support to students without disabilities, and 4) judge the success of inclusion not only by academic gains but also by an increase in the number of friends in the students' lives.

Involving Students in Problem Solving to Remove Barriers to Social Relationships

When students themselves are empowered and supported to address the barriers to friendship that exist for students with significant disabilities, they are more likely to own the solutions that they develop than if the ideas come from adults. There are two different ways that inclusion facilitators can promote this essential consideration for friendship. First, an inclusion facilitator can identify existing groups or organizations in the school that focus on connecting students and breaking down barriers to belonging.

For example, the inclusion facilitator who supported one student, Philip, spoke to the advisor of Philip's high school Key Club

and found out that club members spent much of their weekly meeting time talking about issues of race, gender, sexual orientation, class, war, and peace in addition to discussing the group's community service activities. The inclusion facilitator encouraged Philip to join the club, and after several meetings in which the inclusion facilitator stayed to provide support, the club advisor confided that the other students had asked that Philip be allowed to attend meetings alone. During the years that Philip was a member, the club continued its volunteer activities but expanded its role in the school to include advocating for social justice issues. The club sponsored presentations by activists on a variety of topics, and Philip developed long-term friendships with several of the other club members.

The other tool that has been used to intentionally facilitate social relationships is the establishment of a "circle of friends" specifically around the student with significant disabilities (Forest, Pearpoint, & O'Brien, 1996). A *circle* is a group of people who are invited to get to know a student who is not yet connected in a meaningful way. The invitation that is extended is not, "Would you please become friends with Katherine?" but rather, "Would you like to join a group of people who are going to meet with Katherine to figure out how to get her more connected to this school?"

Marsha Forest described her own journey with her friend Judith Snow as an example of what can happen when people come together to help someone in need (Perske & Perske, 1990). Judith was a well-respected disability advocate from Canada who traveled all over the world to talk about what it would take for communities to welcome all their citizens. Through her own story, Judith delivered a powerful message about accepting all people's gifts and talents, rejecting the notion that people with disabilities are broken and need to be fixed. Ironically, Judith herself lived in a nursing home for seniors and other people with disabilities. She rarely got out in the community to socialize except when she was being paid as an expert in inclusive community living! She struggled every day to receive dignified care, and her health was in a precarious state several times because of misdiagnoses or mistreatment of a variety of health-related problems.

Under Marsha's guidance, Judith's friends came together to form a circle around her that literally saved her life. In the beginning, members of the circle took over Judith's around-the-clock care, nursing her back to physical and psychological health. Then, they worked with Judith to plan for her to leave the nursing home and live instead in the community. The group demonstrated that

people who have been marginalized sometimes need others to create an intentional community around them.

This notion of a circle of support or friendship can be applied to school-age students, too. Donny was a 9-year-old boy with significant learning, physical, and behavioral disabilities. When he returned from a segregated facility to a fourth-grade class in his neighborhood school, a group of children were invited to become part of "Donny's team." Donny's team met at his house every Thursday after school to sit around and talk, snack, and play computer games together. Donny's inclusion facilitator, Sue, provided support to the kids as they tackled issues such as Donny's difficulty in participating in physical education class and his loneliness on weekends.

During one of these meetings, Sue asked the kids to talk about what they thought was standing in the way of Donny being just a regular kid in their school. Not surprisingly, none of the kids talked about Donny's disabilities. They did point out, however, that because Donny rode the special education bus, he arrived later than his whole class, he had a hard time settling into the classroom routine because he did not hear morning announcements, and he missed a 15-minute free time period at the end of the day because his bus came early. When Sue told the kids that the people who decided which bus Donny should ride were the special education director and the head of the bus company, they wrote letters to both people asking that Donny be allowed to ride a regular bus. Sue followed up to schedule a meeting with the decision makers to address this issue. When five classmates from Donny's team turned up at the meeting to discuss what supports Donny would need in order to make the switch, the attitudes of the special education director and head of the bus company softened, and they worked out a solution that addressed Donny's situation.

The role of the inclusion facilitator in facilitating a circle of support is to 1) work with the student and his or her family to issue the initial invitation to other students; 2) support the group's organizational needs such as transportation, parent permissions, and an accessible meeting location; 3) overcome any barriers that stand in the way of the student's inclusion and development of social relationships; and 4) help the group confront attitudes that stand in the way of friendship, such as peer pressure, prejudice, benevolence, and pity.

Whether the students are 3, 10, or 21 years old, the presence of an adult facilitator increases the chances that the group will stay together. An adult facilitator can also help the group to form bonds that go well beyond the students' initial motivations of wanting to help someone they perceive as less fortunate than themselves.

Giving Students Access to Age-Appropriate Materials and Activities

Susan was a student in a self-contained program run by a regional collaborative located in a local school. Although Susan was 16 years old, she came to school wearing pigtails, ankle socks, and a sweatshirt embroidered with Minnie Mouse. The only means Susan had of demonstrating choice and control over her environment was to push a one-button switch that played "The Wheels on the Bus Go Round and Round." Is it any wonder that teachers and students alike spoke to Susan as if she were a toddler? Their voice inflections raised when they spoke to her—some even tickled her—and everyone was very resistant to including Susan in typical age-appropriate classes and social activities.

Although this description sounds like a caricature, it is all too typical of students with significant disabilities who have attended segregated schools or who have not been around typical students. In Susan's case, the inclusion facilitator, Marty, met with Susan's mom, Marla, and shared with her some of the comments that Susan's classmates were making about her clothes and accessories. Marla was very invested in Susan's successful inclusion and invited a group of girls to her house over the weekend to help redecorate Susan's room.

The Disney posters on the walls were replaced with those of the latest boy band. The Fisher-Price tape recorder was given to Goodwill, and a new boom box blasted the boy band's current number-one hit. Although Marla did not have an unlimited budget, she did ask the girls if they would be willing to go on a shopping trip with Susan to help her pick out a couple of new outfits for school. Marla purchased several bottles of brightly colored nail polish, and the girls gave each other manicures.

Beneath the surface of this seemingly innocent activity was a strong message about belonging and membership. The girls who visited Susan were not saying that they were intolerant of Susan as a person but rather that they were welcoming her into their circle that was defined in part by similar clothes and interests.

Forging a Partnership Between Home and School to Facilitate Friendships and Participation in Social Activities

The inclusion facilitator is the link between the student's family and the school community. Although this responsibility does not supersede the general education teacher's role, the inclusion facilitator

must take an active role in working with families in order to promote the participation of students with disabilities in school-sponsored extracurricular activities and social events. Furthermore, the inclusion facilitator can provide support to families to carry over school-based friendships at home. Some families of students with disabilities do not create the same opportunities at home for friendships to develop. Some families have never invited classmates to their home, helped their child call a friend on the telephone, or hosted a sleepover. Because students with significant disabilities may need assistance to extend invitations to sleepovers or birthday parties, families may need to be more directive with their children who have disabilities than with their other children who are more able to manage their own social lives.

Many parents report that when their children are young, it feels natural for them to call other parents to extend invitations to a festive event. But once typical children begin to take over those responsibilities when they are around 8 or 9 years old, families are reluctant to maintain their involvement in the negotiations that go along with friendships. An inclusion facilitator can support families during this transition by providing assistance in the form of 1) sending home a list of classmates (with their parents' permission), 2) delivering written invitations to particular classmates, 3) providing some assistance at home to help support a child's social behavior, and 4) facilitating circle discussions that solicit students' ideas for solving any barriers to friendship.

Other team members may have valuable supports to offer as well, such as 1) the speech-language pathologist might program a student's augmentative communication device with social vocabulary and messages, 2) the occupational or physical therapist might visit a student's home to make suggestions for adaptations to games or backyard play equipment, or 3) the paraprofessional may have a particular talent such as arts and crafts or playing computer games and may be willing to spend an afternoon at a student's house when other classmates are there.

Addressing the Climate of the Whole School with Respect to Diversity

Traditional disability awareness days—in which students try to read with thick glasses or spin around in borrowed wheelchairs—have frequently made people more than a little uncomfortable. Viewing disability as a different kind of diversity does not necessarily promote creating a school culture in which all differences are celebrated. For-

tunately, there are a myriad of ways that respect for diversity can be taught at school. First, the school staff ought to reflect racial, cultural, linguistic, gender, and sexual orientation diversities. Because most paraprofessionals who work with students with significant disabilities are women, for example, hiring men for this role demonstrates that they, too, are capable of carrying out nurturing and supportive roles. Second, schools that truly value diversity embed social justice and diversity issues within the curriculum. Particularly at the high school level, there are many opportunities within the curriculum to do this (Fisher, Sax, & Jorgensen, 1998). Table 5.1 depicts a sample of diversity themes and opportunities that exist within the curriculum. Third, schools can establish rituals and celebrations that honor diversity, such as Black History Month, Cinco de Mayo, and Kwanzaa.

Table 5.1. Embedding diversity topics into the curriculum

Issue	Literature	History topics	Science topics
Racial diversity	*Black Like Me* (Griffin, 1961) *The Autobiography of Malcolm X* (X, 1966) *The Color Purple: A Novel* (Walker, 1982)	Civil War Civil Rights Movement Racial profiling	Heredity IQ testing Human performance research
Cultural diversity	*A Tree Grows in Brooklyn* (Smith, 1943) *'Tis: A Memoir* (McCourt, 1999) *The Spirit Catches You and You Fall Down: A Hmong Child, Her American Doctors, and the Collision of Two Cultures* (Fadiman, 1997) *Reading Lolita in Tehran: A Memoir in Books* (Nafisi, 2003)	Immigration policies USA PATRIOT Act of 2001 (PL 107-56) Native American history	Attitudes toward the medical aspects of disability felt or expressed by different cultural groups
Disability	*Of Mice and Men* (Steinbeck, 1937) *To Kill a Mockingbird* (Lee, 1960) *Don't Worry, He Won't Get Far on Foot: The Autobiography of a Dangerous Man* (Callahan, 1989) *No Pity* (Shapiro, 1993) *The Curious Incident of the Dog in the Night-time* (Haddon, 2003)	History of deinstitutionalization Americans with Disabilities Act of 1990 (PL 101-336) Self-advocacy movement	Cloning Prenatal testing Cochlear implants Limb lengthening surgery

Treating Students as If They Are Competent

The last essential condition for friendship is for staff to treat all students as if they are competent. This means engaging students in regular conversations about gifts and talents, the social meaning of disability, and the kinds of prejudice that can get in the way of students respecting one another for their differences as well as for their similarities. When students with disabilities are talked about in their presence as if they are not even there (i.e., staff members commenting about personal hygiene issues in front of other students or directing comments such as "Didn't Antonio do a great job on his birdhouse?" to others rather than to Antonio himself), a message is communicated that the students are unable to speak for themselves and perhaps are unaware that others are talking about them. When staff members use exaggerated praise or demand standards of behavior that are not typically required of other similar-age students (i.e., prompting a high school student, "Can you say 'good morning' to the principal, Antonio?"), a lack of respect for a student's identity and self-determination is communicated. In contrast, when teachers make the least dangerous assumption about students' abilities and treat all students as if they understand, this behavior is modeled by classmates and creates an opening for students to approach one another on a more equal footing. Finally, the use of such derogatory terms such as *retarded* or *low functioning* are antithetical to the notion that all students are competent. They should never be used to refer to a student with disabilities—or to anyone else!

CONCLUSION

Inclusion facilitators are in the position to enhance students' social relationships within the classroom, school, and community. They should not take this job lightly. Students will only be able to achieve desired quality-of-life outcomes when they are included and have friends.

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6

Reconsidering Assessment in Inclusive Education

Identifying Capacities and Challenges within Students, Teams, and Schools

Cheryl M. Jorgensen

Assessment of students, classrooms, teams, and school environments provides a foundation to develop students' inclusive educational programs and requires that an inclusion facilitator use skills related to the role of instructional team leader discussed in Chapter 4. For many inclusion facilitators, the current types and purposes of assessment have changed since they began working. Consider Tom's story.

Tom's Story

Tom O'Reilly is an elementary inclusion facilitator in a small school district in New Hampshire, where he has worked for the last 14 years. His undergraduate background is in communication disorders, and he has a master's degree in special education. Although his original training prepared him to teach students with significant disabilities who were in self-contained classrooms, his role has evolved over the years to that of a true inclusion facilitator. Today there are eight children with significant disabilities on his caseload—two at the preschool level and six in the district's two elementary schools. All are full-time members of general education classes.

When Tom first started teaching, his understanding of assessment was that it was done primarily for three reasons: to establish a student's eligibility for special education, to assign a disability label to a student, and to

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measure a student's current level of performance across many functional categories. When Tom ran a self-contained classroom, he conducted adaptive behavior assessments. The district's psychologist administered IQ tests; the speech-language pathologist did language and communication testing; the occupational therapist measured performance in tasks related to eating, sitting, and using writing instruments; the physical therapist measured gross motor skills such as range of motion, walking, strength, and coordination; and vision and hearing consultants evaluated students' sensory systems. Most of the assessments were done right in the classroom's kitchen, the gross motor area, the bathroom, and at work tables.

The assessment reports usually described what a student could and could not do and determined a level of functioning based on typical children's development. A small number of educational program priorities were identified and written as annual goals for the individualized education program (IEP). There were goals for cognition, gross and fine motor skills, leisure, behavior, and communication. Short-term objectives leading to the achievement of these goals were written in behavioral terms, with measurable criteria as evaluation benchmarks.

Today, the educational landscape is much different. Although Tom must still coordinate assessments for the purpose of determining eligibility for special education and for assigning a disability label, the whole assessment has a much different function relative to inclusive education.

INCLUSIVE ASSESSMENT

There are three main purposes of inclusive assessment: 1) to determine students' skills in academic, social, emotional, and functional skill domains; 2) to determine the constellation of supports and accommodations that students need in order to be successful learners within the general education curriculum; and 3) to determine what support and resources teams need in order to teach these students well. At major transitions in students' educational careers, inclusion facilitators lead teams to conduct comprehensive assessments of students, their education teams, their classrooms, and the broader school environment. These major transitions occur when students first enter public school, when they move to a new building, when they make the transition from self-contained to inclusive environments, as they move into the transition to adulthood (age 18–21), and as they prepare for graduation and leaving the public education system. At the beginning of every new school year, some of the assessments might be repeated or updated. Several kinds of assessment questions and tools used by inclusion facilitators are presented next.

Assessing Students

The purpose of student assessment is to explore a student's history, personality, learning style, strengths, and needs. Perhaps the most important caveat regarding initial student assessment is that educators must not draw conclusions about the student's current skills or potential for learning unless that student has an accurate and reliable means of communication (McSheehan, Sonnenmeier, & Jorgensen, 2002). With respect to this usage, *accuracy* means that a student's communication attempts reflect just what the student intends to communicate, and *reliability* means that a student's communication is consistent over time and is interpreted in the same way by different listeners or communication partners.

For many students with significant disabilities, the application of this rule means that teams will need to withhold judgment about students' capabilities for long periods of time—perhaps years—while many different communication methods and supports are explored. During these periods of exploration and uncertainty, inclusion facilitators must be careful to avoid the use of phrases such as "We know for sure . . ." or "This student will never . . ." because such predictions are often based on scanty or inconclusive evidence (Donnellan, 2000).

Questions that will be answered as a result of an initial student-focused assessment include

- Who is this student? What is his or her history? What are the student's dreams and goals? What are the hopes of his or her parents or guardians? What are the student's likes, dislikes, preferences, and learning style?
- What is this student's educational history? What goals have been focused on in past IEPs? What supports has the student received in the past?
- What does this student know, and what can he or she do? What does the student struggle with? What methods have been used to evaluate the student's learning?
- How does this student communicate, move, and react to the surrounding world with his or her senses?
- What is a typical day like in the life of this student at school and at home?
- What are priorities for learning this year? What supports might be explored to support this student's learning?

The inclusion facilitator coordinates several information-gathering processes that will help the team develop answers to these questions.

MAPS and PATH Beginning in the early 1970s, some people in human services began to use person-centered planning processes as a foundation to develop inclusive lives in the community for people with disabilities. This practice was expanded to school-age students beginning in the early 1980s by pioneers such as Marsha Forest, Jack Pearpoint, and John O'Brien (see Forest, Pearpoint, & O'Brien, 1996). The purpose of MAPS (making action plans) and PATH (planning alternative tomorrows with hope) is for all of the people who care about a student to come together to think about dreams and wishes, to recognize the student's unique gifts and struggles, to describe an ideal day in the student's life, and to make specific action plans regarding the supports that need to be in place to make the dreams a reality. A MAP or a PATH is not an IEP, but information from a MAP or a PATH can inform the development of a student's educational plan and related supports. It is the role of an inclusion facilitator to work with the student's family and other team members to conduct a MAP or a PATH planning session.

Cara's Story

Cara was a sixth-grade student whose family and team were experiencing uncertainty about what would be the best educational program for her as she moved on to middle school. Some people on the team felt that Cara would be better served in a specialized school for students with significant disabilities, and others felt that Cara belonged in her local middle school where she would learn valuable academic and life lessons by being around her classmates who did not have disabilities.

The school district's inclusion facilitator met with Cara's parents, and together they designed the agenda for a MAP meeting that would be attended by Cara, her sister, her parents, several friends of her parents, a couple of classmates, the school principal, and members of her IEP team. The inclusion facilitator knew that it was essential to have a variety of people in Cara's life attend this meeting, not just those who knew her in school. The minutes for Cara's MAP meeting are available on-line at http://www.brookespublishing.com/inclusionfacilitator.

At the conclusion of Cara's MAP meeting, the whole group came to the consensus that what Cara needed to meet her vision for the future was best met living at home with her family; going to her local middle school; and receiving supports in the areas of literacy, augmentative communi-

cation, and a positive behavioral support plan. The action plan specified that Cara's team needed to meet on a weekly basis during the school year to plan upcoming lessons and discuss the adaptations that would be necessary in order for Cara to participate and learn. Cara's team also decided that it needed the expertise of a statewide augmentative and alternative communication (AAC) consultant to help it design a more effective communication system for her. Finally, the group decided that Cara needed to have someone take a more active role in facilitating her social relationships, so her paraprofessional volunteered to work with Cara's mom on this important task.

For some students and their families, using the PATH process is more appropriate for supporting major transitions (e.g., from preschool to elementary school, from a segregated environment back into a neighborhood school, from school to adult life; Forest et al., 1996). PATH is a person-centered planning process that helps an individual and his or her family articulate a long-term vision for the person's life and then work backward to design a year's worth of action plans that will help the person make the upcoming transition.

Review of Records A student assessment also involves a review of the student's records. The inclusion facilitator reviews the student's records to discover the student's educational history, goals from past IEPs, the kinds of support services that the student has had in the past, results of comprehensive evaluations, and most important, consistencies and inconsistencies in information or interventions across service providers. He or she then summarizes the salient points from the review of records and presents them to the team for its consideration as it develops the student's IEP, determines the need for additional assessments, and explores how its members might work effectively together to support the student's inclusion. The following summary statements and recommendations emerged from a review of 13-year-old Alicia's records. (The inclusion facilitator's personal notes are written in italics.)

1. The report of Alicia's IQ score was accompanied by a strong caution not to take this number as an indicator of Alicia's full learning potential. It also cautioned that the results of her IQ test were undoubtedly influenced by Alicia's communication difficulties and attention. *It might be prudent to repeat this cautionary warning on Alicia's IEP so that future teachers can put Alicia's label of mental retardation into perspective.*

2. The psychoeducational evaluation did not generate any suggestions for instruction based on Alicia's learning style, strengths, and challenges. *It might be useful to ask the psychologist who did the evaluation to make some instructional suggestions that relate to each of the findings of her evaluation.*
3. The Child Development Clinic evaluation completed in 2000 recommended that the team explore the use of assistive technology to help Alicia with reading and writing, yet this has not yet been done. *A first step toward addressing this recommendation might be to ask the district's technology consultant to load the software onto Alicia's computer and for her team to engage in a trial of that software to enhance Alicia's reading and writing instruction and performance.*
4. The occupational therapist's report suggested that Alicia was not a candidate for direct services at this time. *It might be helpful to have the occupational therapist do a functional assessment of the demands of Alicia's classes at the beginning of every semester and then present the team with a plan for how Alicia's consultative services might be delivered to other members of the team with regard to adaptations or modifications of the environment.*

Interviews The inclusion facilitator is the one member of a student's school team who sees the student in all environments, is positioned to facilitate communication among team members, and has the broad perspective required to see the big picture of the student's educational program. At the beginning of every school year, the inclusion facilitator seeks information from all people who will be part of the student's team and shares information with these team members about the student's educational goals and necessary supports. When students are in elementary school, most members of their team might be consistent from year to year, with only the classroom teacher changing. At the middle school level, students are likely to have a whole new team of general education teachers every year, but the related-services providers would probably be the same throughout middle school. In high school, there may be new subject area teachers every quarter or semester. Parents are also key participants in the interview process (and the interview should be conducted in the student's home if desired by the parents), as are the building principal and relevant special education administrators (either at the building or at the district levels).

The purpose of conducting formal interviews with team members shortly before or just as the school year starts is to discover 1) what they think they know about the student and the accuracy of that information; 2) their understanding of the goals of the student who is in their class, in their building, or on their caseload; 3) their past experiences with students with significant disabilities; 4) their understanding of their role on the team; 5) the level of expectations they hold for the student; and 6) any concerns they have about the student's learning, behavior, or health. Jamie's inclusion facilitator conducted formal interviews at the beginning of the school year.

Jamie's Story

Jamie was an elementary school student with significant disabilities who was making the transition to a regional middle school. The school's inclusion facilitator developed a set of interview questions to ask all team members. Some people who had just met Jamie recently were unable to answer some questions, but even these people's uninformed impressions were important to know. The inclusion facilitator assured each team member that his or her responses would be held in confidence but told everyone that a summary of the interview themes would be presented to the team for consideration at the first team meeting of the year. The interview questions are depicted in Table 6.1, and a summary of interviews concerning Jamie is available on-line at http://www.brookespublishing.com/inclusionfacilitator.

Day in the Life Observation A "day in the life" observation is done early in the school year to experience the school day from a student's perspective, to increase understanding of the factors that influence the student's educational experiences, and to provide some information about how the student's program aligns with promising educational practices. (Guidelines for completing this observation are presented in Appendix D.) The inclusion facilitator gathers the results of the student assessment into a report containing 1) MAPS or PATH notes, 2) a review of student records, 3) a synthesis of team member interviews, and 4) a "day in the life" observation.

Assessing the Classroom

Prior to planning a student's instructional programs and supports, the inclusion facilitator coordinates a comprehensive assessment of the classroom or classrooms in which the student will be a member. This assessment should answer the following questions:

Table 6.1. Team member interview questions

Mission and philosophy questions
What is the school's mission statement?
How are decisions made about the direction of school policy and practice?
How does the mission statement apply to students with the most significant disabilities?
Is there a school policy about inclusion of students with the most significant disabilities?
What changes have you witnessed over the years with respect to how students with significant disabilities are educated?
How did those changes occur?
What information, beliefs, or other factors affect your opinion about appropriate educational programs for students with significant disabilities?
Faculty questions
How do you think the faculty feels about students with significant disabilities being in general education classes?
Do you think the faculty members feel competent to teach students with significant disabilities in their general education classes?
What professional development is available for faculty members on this topic?
Do you think there is enough time for the faculty to work collaboratively to plan, implement, and evaluate instruction for students with significant disabilities who are in general education classes?

- Is the classroom physically accessible? What are the sensory characteristics of the classroom? Lighting? Noise? Smell?
- How are the learning areas of the classroom arranged? Students' desks? Work tables? Teacher's desk? Board? Lab tables and equipment? Bookcases?
- What instructional groupings does the teacher use? Whole class? Small group? Student pairs? One-to-one direct instruction?
- What social and instructional routines are used? Choral reading? Attendance? Pledge of Allegiance? Snack time? Lecture and notetaking? Seatwork? Writing on the board? Handing in homework? Discussion and dialogue? Cooperative groups? Warm-ups? Gathering equipment and materials? Cleaning up at the end of class?
- What instructional materials does the teacher use? Books? Workbooks? Worksheets? Computer? Manipulatives? Overhead projector? Tools?

- What are the behavioral expectations and consequences in the classroom?
- How is diversity addressed in the classroom?

The inclusion facilitator answers these questions by observing in the classroom; reviewing documents such as curriculum standards, instructional materials, and classroom rules; and talking with the classroom teacher. He or she then writes a classroom profile based on these sources of information.

Assessing the School Environment

Assessment of the school environment provides essential information to the team relative to the kind of education and advocacy that might be needed to ensure that students with significant disabilities have access to the same learning environments and opportunities as students without disabilities. The inclusion facilitator's role as a schoolwide leader and advocate is thoroughly addressed in Chapter 7, but the inclusion facilitator must also promote an understanding of school culture by members of individual students' teams. The questions that need to be answered as part of the student-related assessment of the school environment include

- What is the school's mission statement? How is diversity addressed within the school's mission? Where does special education fit relative to general education?
- What are the governance structures within the school? When policies or structures need to be modified to promote access or learning for students with significant disabilities, how are those changes made?
- What professional development opportunities and resources are available for staff?
- What role do families and the community play in the school?
- Is the school safe?

To gather this information, the inclusion facilitator reviews school documents and conducts administrative interviews. Public documents are reviewed, such as the school's mission statement, handbook, yearly improvement and professional development plans, and discipline policies and local curriculum manuals. Administrative interviews (e.g., using the questions presented in Table

6.1) reveal the building leaders' attitudes about students with disabilities as well as their leadership styles.

Asssessing the Team's Capacity to Implement Best Practices

Following this comprehensive assessment of the student, classroom, and school, the inclusion facilitator then suggests to the team the issues that surfaced as needing work in order for the whole team to work most effectively to support the student's education. These issues might include 1) reaching consensus about the student's pursuit of general education curriculum content and the role that functional skills instruction should have in the student's educational program, 2) expanding the student's communication system, 3) gaining clarity about team member roles and responsibilities, 4) using more effective collaborative teaming processes and structures, 5) improving assessment of student learning by examining samples of student work on a regular basis, 6) providing intentional facilitation of social relationships, and 7) exploring what resources will be available to support the student when he or she leaves school and beginning to plan for that eventuality. From among a list of possible team priorities for improvement, members are asked to rank these issues according to their importance, and the issues that receive the highest rank become the priorities for the team's work over the course of the academic year.

DEVELOPING STANDARDS-BASED INDIVIDUALIZED EDUCATION PROGRAMS

In the 1970s, the educational programs of students with significant disabilities focused on their acquisition of developmental milestones similar to those of students without disabilities. Students were grouped together with classmates who were at a similar developmental level, and classrooms sometimes had students ranging in age from 3 to 21. Students worked on prerequisite skills such as stacking, matching, object permanence, color identification, and cause and effect, and a significant portion of their school day was spent in various therapy activities or personal care routines (Calculator & Jorgensen, 1994). IEPs during that era were similar to Jill's, which is depicted in Figure 6.1. Students leaving school in the early 1970s went on to day habilitation programs, or, if they were "higher functioning," sheltered workshops.

Then, in the late 1970s, Brown, Branson, Hamre-Nietupski, Pumpian, Certo, and Gruenewald (1979) postulated that students with significant disabilities needed to learn functional skills and