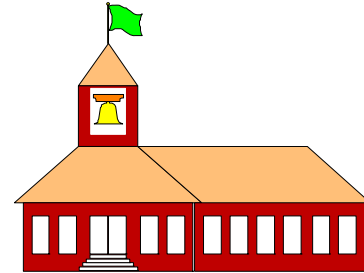




A Center Report



Organization Facilitators: A Key Change Agent for Systemic School and Community Changes

(2011 Revision)

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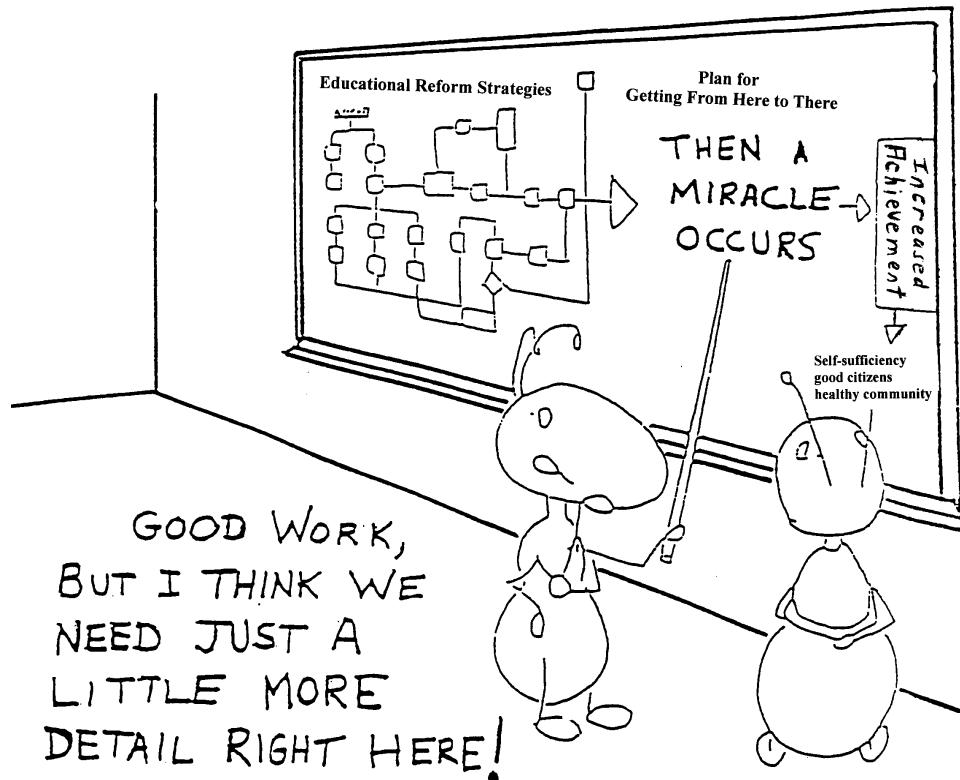
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Preface

Over the last 20 years, we have focused on how to make successful systemic change less than a miracle. Some of this work is published in the journals and in books; other facets are reflected in the resource materials circulated by our Center at UCLA. One of the frequent inquiries we receive is for more information on this work and, in particular, for information about the school system change agent mechanism we have designated as an Organizational Facilitator.

Substantive changes require guidance and support from professionals with mastery level competence for creating a climate for change, facilitating change processes, and establishing an institutional culture where key stakeholders continue to learn and evolve.

This document provides some basic information about systemic change roles and functions related to promoting, facilitating, sustaining, and replicating innovations throughout a school district. The emphasis is on developing and staffing a set of change agent mechanisms that are interconnected to form an infrastructure for systemic change.

Howard S. Adelman & Linda Taylor
Co-directors


Organization Facilitators: A Key Change Agent for Systemic School and Community Changes

CONTENTS

Preface

Systemic Change Agents: Individuals or Interconnected Mechanisms	2
Systemic Change Functions	2
Systemic Change Infrastructure	3
<i>Exhibit 1 – On Change Agents</i>	4
Organization Facilitators and School Systemic Changes	6
<i>Exhibit 2 – Basic Infrastructure for Diffusion of School Improvement Innovations</i>	9
Organization Facilitator Functions	10
<i>Exhibit 3 – Examples of General Task Activity for an Organization Facilitator</i>	11
Organization Facilitators Help Connect Families of Schools to Enhance School Improvement	13
<i>Exhibit 4 – Developing and Connecting Mechanisms at Schools Sites with Families of Schools, and District and Community-wide</i>	14
Strategies in Facilitating Systemic Change	15
A Few General Comments about Systemic Change Practices at Schools	16
<i>References Cited (and a Few Others)</i>	17
<i>Appendices</i>	20
A. A Unifying Intervention Framework for Schools and Districts to Address Barriers to Learning and Teaching	21
b. Overview of Major Steps Related to Establishing a Comprehensive, Multifaceted, and Cohesive Component for Addressing Barriers to Learning at a School Site	25
c. A Sample of Center Resources for Developing a Comprehensive System of Learning Supports	26

Organization Facilitators: A Key Change Agent for Systemic School and Community Changes



Any school where a significant number of students are not performing well is under the gun to make major improvements. This has led to many initiatives for major systemic school change and school-family-community connections. Often, the complexity of the systemic changes involved requires knowledge, skills, and attitudes not currently covered in professional preparation. As a result, few school professionals assigned to make major systemic changes have been taught how to create the necessary motivational readiness among a critical mass of stakeholders or how to institutionalize and facilitate replication and scale-up of new approaches.

Substantive changes require guidance and support from professionals with mastery level competence for creating a climate for change, facilitating change processes, and establishing an institutional culture where key stakeholders continue to learn and evolve. For instance, a considerable amount of organizational research in schools, corporations, and community agencies outlines factors for creating a climate for institutional change. The literature supports the value of (a) a high level of policy commitment that is translated into appropriate resources (leadership, space, budget, time); (b) incentives for change, such as intrinsically valued outcomes, expectations for success, recognitions, and rewards; (c) procedural options from which those expected to implement change can select those they see as workable; (d) a willingness to establish mechanisms and processes that facilitate change efforts, such as a governance mechanism that adopts ways to improve organizational health; (e) use of change agents who are perceived as pragmatic -- maintaining ideals while embracing practical solutions; (f) accomplishing change in stages and with realistic timelines, (g) providing feedback on progress; and (h) institutionalizing support mechanisms to maintain and evolve changes and to generate periodic renewal. An understanding of concepts espoused by community psychologists such as empowering settings and enhancing a sense of community also can make a critical difference (Duffy, 2005; Hollander & Offermann, 1990; Sarason, 1996).

Building on what is known about organizational change, our Center staff for many years has been working on clarifying what school staff need to understand about making systemic changes for school improvement (Center for Mental Health in Schools, 2006a). Along the way we have developed a position called an *Organization Facilitator*. This change agent is intended to play a major role in establishing an infrastructure for systemic change in districts and schools (Adelman, 1993; Adelman & Taylor 1997; 2007; 2008; Center for Mental Health in Schools, 2006b; Taylor & Adelman 1999).

Systemic Change Agents: Individuals or Interconnected Mechanisms

Systemic changes for school improvement obviously need to begin with a clear framework and map for what changes are to be made. It should be equally obvious that there must be a clear framework and map for how to get from here to there, especially when the improvements require significant systemic change. In both cases, there is a need for a strong science-base, leadership, and adequate resources to facilitate capacity building. And, in both cases, a central focus must be on ensuring there is a well-designed infrastructure for carrying out major functions.

In making systemic changes in schools, major functions (e.g., processes and tasks) must be addressed expeditiously. This, of course, requires change agents. However, rather than thinking in terms of agents as individuals, it is better to think in terms of an infrastructure of mechanisms for change. In this way, the focus is first on the functions that need to be carried out and then on the interconnected mechanisms that are essential if the functions are to be carried out effectively and efficiently. That is, the emphasis is on ensuring that structure follows function and then the focus turns to the individuals who embody each mechanism.

In the case of a given innovation, the change functions and related change mechanisms can be viewed as *temporary*. Thus, once systemic changes have been accomplished effectively, the temporary mechanisms could be redeployed or phased out – with any ongoing essential roles and functions assimilated into regular structural mechanisms.

Systemic Change Functions

Key intervention concerns related to school improvement and systemic change are intimately linked to the other. The elements in both instances are conceived as encompassing the

- vision, aims, and underlying rationale for what follows
- resources needed to do the work
- general functions, major tasks, activities, and phases that must be pursued
- infrastructure and strategies needed to carry out the functions, tasks, and activities
- positive and negative results that must be assessed.

Each of these elements is the focus of strategic planning not only with respect to a school-level prototype, but also with respect to *how* the school will accomplish essential changes. At the district level, the need is for a separate strategic plan that clarifies how the district will facilitate replication-to-scale of prototype practices.

Change functions include those involved in creating readiness, initial implementation, institutionalization, and creative renewal.

The main work in producing systemic changes revolves around planning and facilitating:

- infrastructure development, maintenance, action, mechanism liaison and interface, and priority setting;
- stakeholder development, especially resource linking and provision, coaching and mentoring – with an emphasis on creating readiness and commitment both in terms of motivation and skills, team building, providing technical assistance, and organizing basic interdisciplinary and “cross-training”;
- communication and visibility, resource mapping, analyses, coordination, collaboration, and integration;
- formative evaluation, progress monitoring, rapid problem solving, and accountability;
- ongoing support.

Systemic Change Infrastructure

Staffing of systemic change infrastructure mechanisms draws on internal personnel. However, specific functions may require use of persons with expertise who come from outside the system. As Connor and Lake (1988) discuss, problems can arise in relation to both internal and external change agents.

The tendency in discussing systemic change has been to focus on persons who formally assume the role of change agents or who are informal change agents (see Exhibit 1). With respect to innovations in schools, such change agents are seen as working toward accomplishing effective implementation of the innovations. Formal change agents may be designated as such by title, role, and functions, or the work may be an added assignment to the regular role of specific individuals. Change agents may be employed from within or brought from outside the system where the innovation is to be implemented. Other stakeholders who want an innovation implemented may act informally to facilitate change.

Change agents should not be confused with intervention *purveyors*. Purveyors are designated representatives of practices. Some are researchers interested in having their intervention adopted; some are company representatives involved in selling an intervention and related training. Purveyors often work with schools and may or may not be trained as change agents.

Implementation and scaling-up of major school improvement efforts require *administrative leadership* and the addition of other *temporary mechanisms* to facilitate changes.

Exhibit 1

On Change Agents

E.M. Rogers – As with so many others, Rogers (2003), tends to define a change agent in ways that convey the sense that one is talking about an individual. He states that a change agent “is an individual who influences clients’ innovation decisions in a direction deemed desirable by a change agency.” Note that the intended direction usually is to enhance adoption, but it may also be to prevent the adoption of “certain innovations with undesirable effects.”

In Rogers’ view, change agents face two main problems: “(1) their *social marginality*, due to their position midway between a change agency and their client system, and (2) *information overload*, the state of an individual or a system in which excessive communication inputs cannot be processed and used, leading to breakdown.” In this context, he describes change agents as linkers – “providing a communications link between a resource system with some kind of expertise and a client system. ... By understanding the needs of the clients, a change agent can selectively transmit to them only information that is relevant.”

Rogers identifies a sequence of seven “roles” for a change agent: “(1) to develop a need for change on the part of clients, (2) to establish an information-exchange relationship, (3) to diagnose problems, (4) to create an intent to change in the client, (5) to translate intentions into actions, (6) to stabilize adoption and prevent discontinuance, and (7) to achieve a terminal relationship with clients.”

Among the factors he views as key to change agent effectiveness are the extent of effort expended, the degree to which an innovation is compatible with clients’ needs and is pursued through opinion leaders, and qualities such as the change agent’s empathy with clients and a client’s perception of the change agent’s credibility.

P.E. Connor & L.K. Lake – Connor and Lake (1988) state: “Change agents are those people who operate to alter the status quo in an organization. It is their intention to cause parts of an organization to operate differently from the way they have operated in the past. Beyond this ..., two things can be said of change agents. One, because the term ‘change agent’ encompasses a number of different roles, there may be one or several people filling those roles during a particular change. Two, change agents’ organizational and personal characteristics influence their success in initiating and implementing changes.”

In addition to the overall role of managing change, four main change agent roles are described: (1) catalysts, (2) solution givers, (3) process helpers, and (4) resource linkers.

Among the organizational characteristics influencing the effectiveness of a change agent, Connor and Lake stress the matter of who designates the change agent, where the change agent is in the organization’s hierarchy, and whether the change agent comes from inside or outside the organization. Each of these is associated with advantages and disadvantages. On a personal level, they suggest that a good change agent has an interest in change and a vision for the future, is persistent and anticipates problems, has a good sense of timing, has a combination of a big picture orientation and the ability to attend to a myriad of details, and can secure cooperation (e.g., overcoming resistance and other barriers to change).

In general, existing infrastructure mechanisms must be modified in ways that guarantee new policy directions are translated into appropriate daily operations. Well-designed mechanisms ensure local ownership, a critical mass of committed stakeholders, processes that overcome barriers to stakeholders effectively working together, and strategies that mobilize and maintain proactive effort so that changes are implemented and there is renewal over time.

It is rare to find situations where a well-designed systemic change infrastructure is in place. More characteristically, ad hoc mechanisms have been set in motion with personnel who have too little training and without adequate formative evaluation. It is common to find structures, such as teams and collaboratives operating without clear understanding of functions and major tasks. This, of course, defies the basic organizational principle that structure should follow function.

Effective and linked administrative leadership *at every level* is key to the success of any systemic change initiative in schools. Everyone needs to be aware of who is leading and is accountable for the development of the planned changes. It is imperative that such leaders be specifically trained to guide systemic change. And, they must be sitting at key decision making tables when budget and other fundamental decisions are discussed.

*The real difficulty in changing the course of any enterprise lies
not in developing new ideas but in escaping old ones.*

John Maynard Keynes

Organizational Facilitators and School Systemic Changes

As indicated in the Center’s Information Resource entitled *Systemic Change for School Improvement* (2006a), the general functions and major tasks related to sustainable and replicable systemic changes require dedicated change agent mechanisms that are fully integrated into the infrastructure for school improvement at each school site, for a “family of schools,” and at the district level. Thus, a significant portion of the resources for systemic change must be used to design and implement the set of integrated mechanisms that constitute the temporary, but essential, infrastructure for steering, facilitating, and evaluating the change process itself.

To illustrate the nature of the necessary infrastructure for systemic change, it helps to think in terms of four key temporary, overlapping mechanisms. For example, at the school level, these are: (1) a site-based *steering* mechanism to guide and support replication, (2) an organization facilitator who works with a leadership team focused on the desired systemic change (e.g., development of a comprehensive system of student and learning supports); this facilitator has responsibility for daily tasks related to creating readiness and initial implementation of desired changes, (3) a site-based *change team* (consisting of key site-stakeholders) that has responsibility for coalition building, implementing the strategic plan, and maintaining daily oversight (including problem solving, conflict resolution, and so forth), and (4) other *mentors* and *coaches* who model and teach specific elements of new approaches.

In this respect, there are those who have formal leadership roles and functions, there are informal leaders, and there are those whose roles and functions are to facilitate, coach, and mentor the necessary organizational and operational changes. Of course, the roles and functions overlap at each level and among levels.

- ***Steering Group.*** Part of a systemic change infrastructure are “champions” who agree to steer the process. Such a group provides a broad-based and potent mechanism for policy alignment and guiding and helping to manage change. At the district and school level, the steering group creates a special leadership body that owns the linked visions for school improvement and systemic change and oversees and supports the work. Group members must be competent with respect to what is planned and highly motivated not just to help get things underway but to ensure sustainability.

The first focus of a steering group is on assuring that capacity is built to accomplish the desired systemic changes. This includes ensuring an adequate policy and leadership base for implementation. If essential policy and staffing are not already in place, this becomes the first focus for the group. Some members of the group can also coach and mentor.

Capacity building, of course, also includes special training for change agents. Over time, the main functions of a steering group are to ensure that staff assigned to facilitate changes (a) maintain a big picture perspective, (b) make appropriate movement toward long-term goals, and (c) have sufficient support and guidance.

Steering groups should not be too large. For example, at a school level, membership should include a few well-connected “champions” and the key change agents (e.g., the administrative leader and other system change staff) who have responsibility for implementing school improvements. To work against the perception that it is a closed, elite group, it can host “focus groups” to elicit input and feedback, provide information, and problem solve.

- **Organization Facilitators.** Some years ago, as part of a federal dropout prevention initiative, we developed a change agent position called an Organization Facilitator to aid with major restructuring (Adelman & Taylor 1997; Taylor, Nelson, & Adelman, 1999). This specially trained change agent embodies the necessary expertise and leadership to help school sites and complexes substantively adopt/adapt, implement, and institutionalize school improvements. A cadre of Organization Facilitators represent the type of mechanism districts need to replicate-to-scale desired school improvements and reforms.

Organization Facilitators are in a unique position to create the trust, knowledge, skills, and the attitudes essential for the kind of working relationships required for effective systemic change. They understand that a good part of organization change involves organizational learning (Senge, 1999). To this end, they provide coaching and mentoring and also can bring in speciality coaches or mentors whenever a specialist is needed to assist in replicating a specific type of improvement. Through this capacity building, each stakeholder has the opportunity to clarify roles, activities, strengths, and accomplishments, and learn how to link with each other.

- **Change Team.** One of the first functions of an Organization Facilitator at a school is to help form and train an on-site change team that includes a site administrator and staff focused on developing and implementing a major systemic change. This may be a temporary team or a team that will not only facilitate the changes but will continue as a leadership team for the new approach.

With the Organization Facilitator initially guiding the work, members of the school’s change team learn to be catalysts and managers of systemic change as they develop and facilitate initial implementation of school improvements and reforms. Like the steering group, they help ensure changes are implemented in ways that are true to the vision and compatible with the local culture. Clearly, substantive school improvements require team members who are close to the action, are committed each day to ensuring effective systemic change, and have enough time and ability to attend to details

In general, during the period when changes are introduced, the team is responsible for creating readiness, coalition building, resource mapping and analysis, clarifying priorities for developing and implementing strategic plans, establishing work groups, maintaining daily oversight, problem solving, resolving stakeholder conflicts, and so forth. As problem solvers, they not only respond as problems arise but take a proactive stance by designing strategies to counter anticipated barriers to change, such as negative reactions and dynamics, common factors interfering with working relationships, and system deficiencies. They do all this in ways that enhance empowerment, a sense of community, and general readiness and commitment to new approaches. After initial implementation, the team can assume ongoing leadership for maintenance and renewal or ensure that institutionalized mechanisms take on the essential functions. They provide a necessary organizational base and skilled personnel for diffusing improvements into a school.

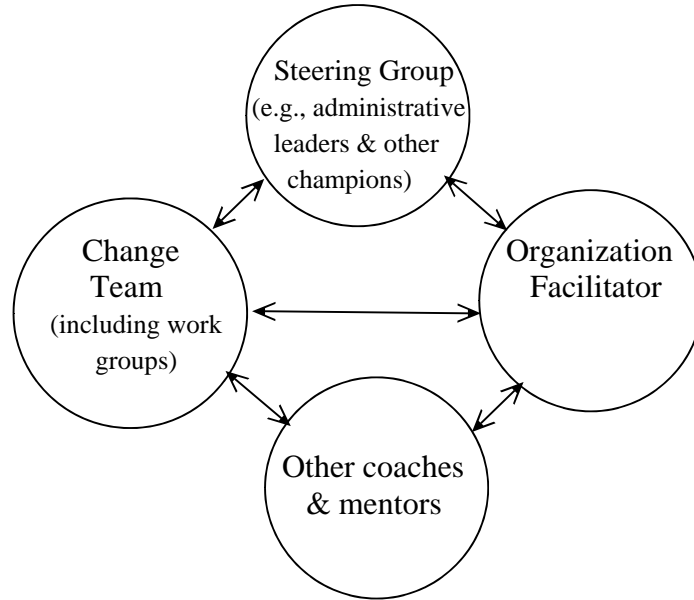
- ***Mentors and Coaches.*** During initial implementation, the need for mentors and coaches is acute. Inevitably new ideas, roles, and functions require a variety of stakeholder development activities, including demonstrations of new infrastructure mechanisms and program elements. An Organization Facilitator is among the first providing mentorship. Members of change teams can also play a role as coaches and mentors. Mentors indigenous to a particular site and others in the system who have relevant expertise also can be brought in. In some cases, the pool may need to be augmented periodically with specially contracted coaches. And, sometimes, external stakeholders can be identified and recruited as volunteers to offer support.

A regularly accessible cadre of mentors and coaches is an indispensable resource in responding to daily calls for help. Ultimately, every stakeholder is a potential mentor or coach for somebody.

Exhibit 2 graphically represents the basic operational infrastructure for diffusion of school improvement innovations and briefly describes the process for replication across a district.

Exhibit 2

Basic Operational Infrastructure for Diffusion of School Improvement Innovations



Ideally, the essence of any fundamental school improvement innovation is intended to be replicated in most, if not all, schools in a district. When this is the case, a district steering group and a district change team are established (e.g., a cadre of full time, specially Organization Facilitators), and speciality coaches and mentors who can be called upon when needed are identified.

Given sparse resources and complex innovations, districts with many schools usually must phase-in major systemic changes at subsets of schools over a period of years. Optimally, a subset consists of a high school feeder pattern. (In small districts, this may constitute all the schools.)

As the innovation is introduced, the district steering group and change team are formally linked to the comparable mechanisms at each participating school. Among an Organization Facilitator's first tasks is to help form and train a school site change team. Such a team (and its work groups) may consist of personnel representing the school administration, specific programs, union chapter chairs, and staff skilled in facilitating problem solving and mediating conflicts. They will likely be drawn from existing teams. This composition allows for collaboration of outside and internal agents for change who are responsible and able to address daily concerns.

A relatively small cadre of district Organization Facilitators and other coaches and mentors can facilitate initial implementation and capacity building by rotating among the first subset of schools and then moving on to the next as the implementation takes hold. They provide ongoing support by cycling back as needed, and they return to facilitate institutionalization. In a moderate sized district, it should be feasible to diffuse, institutionalize, and replicate-to-scale a major school improvement innovation over several years.

Organization Facilitator Functions

With the above as context, we turn to a more detailed look at an Organizational Facilitator as an agent for *school change*. As suggested above, such an individual might be used as a change agent for one school or a group of schools. A cadre of such professionals might be used to facilitate change across an entire district. The focus might be on changes in a few key aspects or full-scale restructuring.

An Organization Facilitator's core functions require a background and training for understanding

- *the innovation to be diffused and the specific systemic changes (content and processes) to be accomplished* (In this respect, a facilitator must have an assimilated understanding of the fundamental concerns underlying the need for change and the nature and scope of the innovation to be implemented.)
- *how to work with stakeholders as they rethink and rework their policies, interventions, infrastructure, and institutional culture*

Near-peers are seen as role models, and their behavior tends to be imitated by others. In contrast, innovators are usually viewed with mistrust by the rest of the population because they deviate too far from the norms of the system.

L. Sherry

As can be seen in Exhibit 3, the main work revolves around planning and facilitating

- effective operational infrastructure (re)development, maintenance, action, mechanism liaison and interface, and priority setting;
- stakeholder development, coaching, and mentoring – emphasizing creating readiness and commitment both in terms of motivation and skills, team building, providing technical assistance, and organizing basic interdisciplinary and “cross-training”;
- communication and visibility, resource mapping, analyses, coordination, collaboration, and integration;
- formative evaluation, progress monitoring, rapid problem solving, and accountability;
- ongoing support.

Note: An understanding of the nature of an innovation, systemic change processes, and functions, steps, tasks, and strategies for implementation, sustainability, and replication-to-scale provides the basis for formulating change agent job descriptions.

Exhibit 3

Examples of General Task Activity for an Organization Facilitator

1. Infrastructure tasks

- (a) Works with governing agents to further clarify and negotiate agreements about
 - policy changes
 - participating personnel (including administrators authorized to take the lead for the systemic changes)
 - time, space, and budget commitments
- (b) Identifies an administrative lead for the change team
- (c) Helps the leader identify members for the team and helps prepare the members to carry out functions

2. Stakeholder development

- (a) Provides general orientations for governing agents
- (b) Provides leadership coaching for site leader responsible for systemic change
- (c) Coaches team members (about purposes, processes, working relationships)

Examples: At a team's first meeting, the Organization Facilitator offers to provide a brief orientation (a presentation with guiding handouts) and any immediate coaching and specific task assistance that team facilitators or members may need. During the next few meetings, the organization facilitator and/or other coaches might help with mapping and analyzing resources. Teams may also need help establishing processes for daily interaction and periodic meetings.

- (d) Works with the administrative leader and team to ensure presentations and written information about infrastructure and activity changes are provided to all stakeholders

3. Communication and visibility; resource mapping and analyses; coordination, collaboration, and integration

- (a) Determines if info on new directions (including leadership and team functions and membership) has been written-up and circulated. If not, Facilitator determines why and helps address systemic breakdowns; if necessary, effective processes are modeled.
- (b) Determines if leader and team members are effectively handling priority tasks. If not, the Facilitator determines why and helps address systemic breakdowns; if necessary, effective processes are modeled.

(cont.)

Exhibit 3 (cont.) – **Examples of General Task Activity for an Organization Facilitator**

- (c) Determines if change and work teams are being productive (and if not, takes appropriate steps to enhance motivation, systems, and working relationships)
For example, determines if resources have been
 - mapped
 - analyzed to determine
 - >how well resources are meeting desired functions
 - >how well programs and services are coordinated/integrated (with special emphasis on maximizing cost-effectiveness and minimizing redundancy)
 - > what activities need to be improved (or eliminated)
 - > what is missing, its level of priority, and how and when to develop it
- (d) Determines the adequacy of efforts made to enhance communication to and among stakeholders and, if more is needed, facilitates improvements (e.g., ensures that resource mapping, analyses, and recommendations are written-up and circulated)
- (e) Determines if systems are in place to identify problems related to functioning of the infrastructure and information and communication systems. If there are problems, determines why and helps address any systemic breakdowns and problems in working relationships.
- (f) Checks on visibility of reforms and if the efforts are not visible, determines why and helps rectify

4. Formative Evaluation, Progress Monitoring, Rapid Problem Solving, and Accountability

- (a) Works with leader and team members to develop procedures for formative evaluation and processes that ensure rapid problem solving to overcome barriers to change – including, anticipating and addressing negative reactions and dynamics (e.g., reactance, apathy and low valuing, apprehension, unrealistic expectations).
- (b) Checks regularly to be certain there is rapid problem solving. If not, helps address systemic breakdowns; if necessary, models processes.
- (c) Ensures ongoing assessment of progress and data for accountability

5. Ongoing Support

- (a) Offers ongoing coaching on an "on-call" basis

For example: informs team members about ideas developed by others or provides expertise related to a specific topic they plan to discuss.
- (b) At appropriate points in time, asks for part of a meeting to see how things are going and (if necessary) to explore ways to improve the process
- (c) At appropriate times, asks whether participants have dealt with longer-range planning, and if they haven't, determines what help they need
- (d) Helps participants identify sources for continuing capacity building.

**Organization
Facilitators
Help Connect
Families of
Schools to
Enhance
School
Improvement**

Schools in the same geographic (catchment) area have a number of shared concerns, and feeder schools often are interacting with students from the same family. Furthermore, some programs and personnel are (or can be) shared by several neighboring schools, thus minimizing redundancy and reducing costs. A multi-site team can provide a mechanism to help ensure cohesive and equitable deployment of resources and also can enhance the pooling of resources to reduce costs. Such a mechanism can be particularly useful for integrating the efforts of high schools and their feeder middle and elementary schools. (This clearly is important in connecting with those families who have youngsters attending more than one level of schooling in the same cluster. For example, it is neither cost-effective nor good intervention for each school to contact a family separately in instances where several children from a family are in need of special attention.)

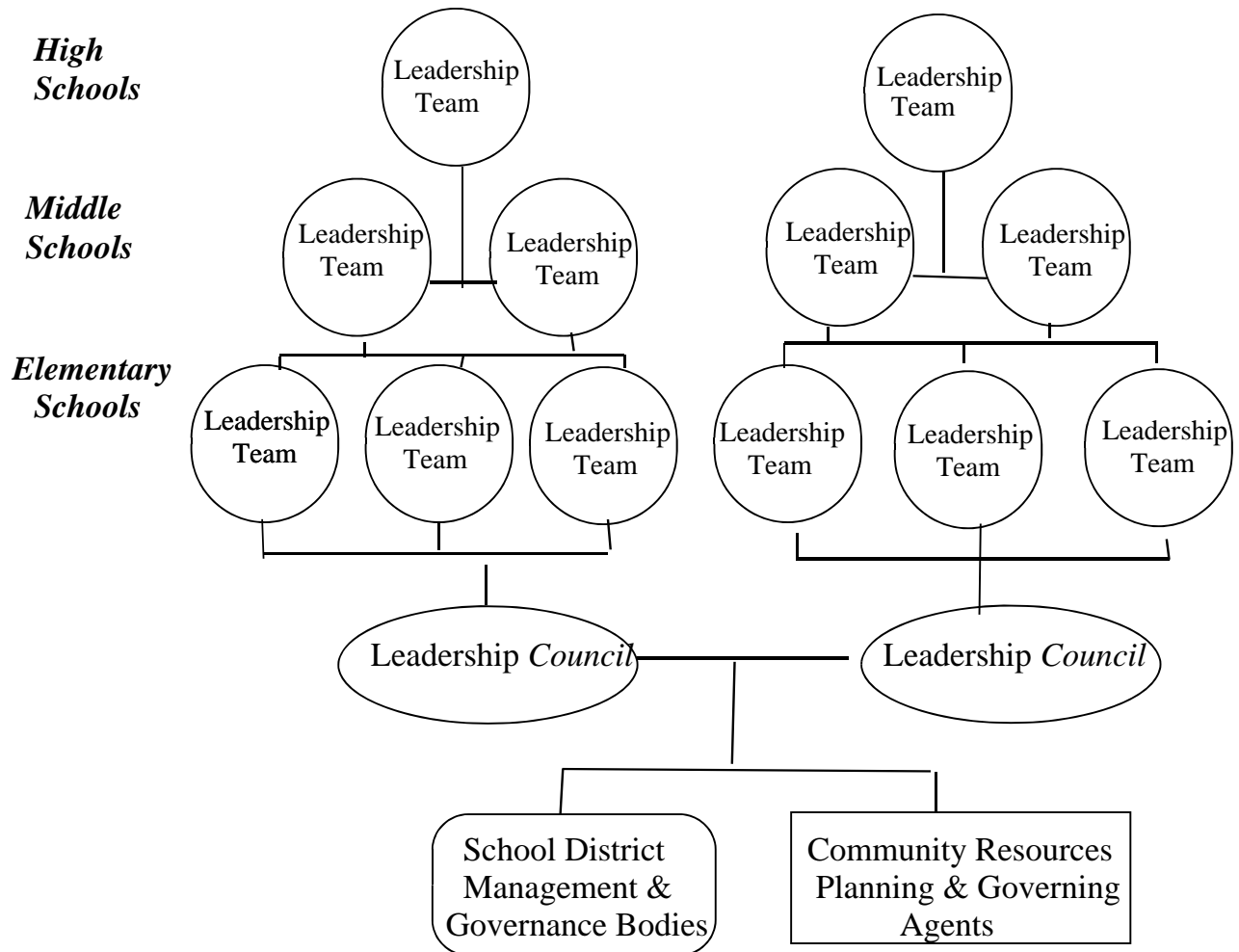
With respect to linking with community resources, multi-school teams are especially attractive to community agencies who often don't have the time or personnel to link with individual schools. In general, a group of schools can benefit from a multi-site resource mechanism designed to provide leadership, facilitate communication and connection, and ensure quality improvement across sites. For example, a multi-site body, or what we call a *Leadership Council*, might consist of a high school and its feeder middle and elementary schools. It brings together one-two representatives from each school's *Leadership Team* (see Exhibit 4).

A Council meets about once a month to help (a) coordinate and integrate programs serving multiple schools, (b) identify and meet common needs with respect to guidelines and staff development, and (c) create linkages and collaborations among schools and with community agencies. In this last regard, it can play a special role in community outreach both to create formal working relationships and ensure that all participating schools have access to such resources.

More generally, the council provides a useful mechanism for leadership, communication, maintenance, quality improvement, and ongoing development of new approaches. Natural starting points for councils are the sharing of needs assessment, resource mapping, analyses, and recommendations for reform and restructuring. Specific areas of initial focus may be on such matters as addressing barriers to learning and teaching and developing prevention programs and safe school plans.

Exhibit 4

**Developing and Connecting Mechanisms at Schools Sites,
with Families of Schools and District and Community-wide**



Strategies in Facilitating Systemic Change

For illustrative purposes, a few strategies to facilitate systemic changes are discussed below. As we have noted already, any move toward substantive systemic change should begin with activity designed to create readiness by enhancing a climate/culture for change. Steps include:

- articulation of a clear, shared vision for the changes (e.g., building interest and consensus; introducing basic concepts to relevant groups of stakeholders)
- mobilizing interest, consensus, and support among key stakeholders (e.g., identifying champions and other individuals who are committed to the changes; planning and implementing a “social marketing” strategy to mobilize a critical mass of stakeholder support; planning and implementing strategies to obtain the support of key policy makers, such as administrators and school boards)
- clarifying feasibility (e.g., how necessary changes can be accomplished; who will lead; what mechanisms can be used to steer and underwrite the change process)
- ensuring there is a major policy commitment from all participating stakeholders (e.g., establishing a policy framework that recognizes the importance of the work)
- negotiating agreements with decision makers and implementers (e.g., about role responsibilities; about how accountability for commitments will be assured).

Administrative support is vital to change, and policy decisions make or break change efforts.

S.M. Stiegelbauer

This is followed by processes for

- enhancing/developing an infrastructure based on a clear articulation of essential functions (e.g., mechanisms for governance and priority setting, steering, operations, resource mapping and coordination).

Pursuing the work requires special attention to the problem of the match between intervention and those who are to change and

- ensuring there is strong facilitation related to all mechanisms
- redeploying resources and establishing new ones
- building capacity (especially personnel development and strategies for addressing personnel and other stakeholder mobility)
- establishing standards, evaluation processes, and accountability procedures.

Because substantive change requires stakeholder readiness and ongoing motivation and capability, it is essential to monitor these matters and to maintain an ongoing emphasis on social marketing and capacity building (see Appendices A and B).

A Few General Comments about Systemic Change Practices at Schools

From the perspective of systemic change, the importance of creating an atmosphere at a school and throughout a district that encourages mutual support, caring, and a sense of community takes on added importance. New collaborative arrangements must be established, and authority (power) redistributed. Key stakeholders and their leadership must understand and commit to the changes. And, the commitment must be reflected in policy statements and creation of an organizational and operational infrastructure at all levels that ensures effective leadership and resources. For significant systemic change to occur, policy and program commitments must be demonstrated through effective allocation and redeployment of resources. That is, finances, personnel, time, space, equipment, and other essential resources must be made available, organized, and used in ways that adequately operationalize and sustain policy and promising practices. As stressed above, this includes ensuring sufficient resources to develop an effective structural foundation, albeit a temporary one, for systemic changes and related capacity building.

Reforms and major school improvements obviously require ensuring that those who operate essential mechanisms have adequate training, resources, and support, initially and over time. Moreover, there must be appropriate incentives and safeguards for individuals as they become enmeshed in the complexities of systemic change.

Clearly, the many steps and tasks described above call for a high degree of commitment and relentlessness of effort. Moreover, time frames for building capacity to accomplish desired institutional changes must be realistic.

Although many of the above points about systemic change and the need for a change agent infrastructure seem self-evident, their profound implications for school improvement are widely ignored. As a result, it is not surprising that so many efforts to improve schools fail.

Major systemic changes are not easily accomplished. Awareness of the myriad political and bureaucratic difficulties involved in making major institutional changes, especially with limited financial resources, leads to the caution that the type of approach described above is not a straight-forward sequential or linear process. Rather, the work proceeds and changes emerge in overlapping and spiraling ways. Those interested in generating systemic changes need to appreciate the implications of this and must persevere relentlessly and opportunistically. To do less is to maintain an unsatisfactory status quo and to leave too many youngsters behind.

There is no
step-by-step
shortcut to
transformation;
it involves the hard,
day-by-day work
of reculturing.

M. Fullan

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For more online resources from the Center and elsewhere related to this report, see the Center's Online Clearinghouse Quick Finds on

- >Systemic Change and the Diffusion of Innovation in Schools (the Implementation Problem)
<http://smhp.psych.ucla.edu/qf/systemicchange.html>
- >Change Agents – <http://smhp.psych.ucla.edu/qf/changeagent.htm>

With specific reference to systemic change to develop a comprehensive system of student and learning supports, the Centers Rebuilding Student Supports toolkit also has many aids – <http://smhp.psych.ucla.edu/summit2002/resourceaids.htm>

For example:

- >Beginning Steps in Personnel Development Related to Establishing a Comprehensive System of Learning Supports
<http://smhp.psych.ucla.edu/pdfdocs/personneldevelopment.pdf>
- >Job descriptions for learning support component leadership
<http://smhp.psych.ucla.edu/pdfdocs/studentssupport/toolkit/aidd.pdf>
- >Notes About the Learning Supports Facilitator Position
<http://smhp.psych.ucla.edu/pdfdocs/lfacilitator.pdf>
- >Benchmark Checklist for Monitoring and Reviewing Progress in Developing a Comprehensive System to Address Barriers to Learning and Teaching
<http://smhp.psych.ucla.edu/pdfdocs/studentssupport/toolkit/benchmarktool.pdf>

And more ...

Appendices

Our work with Organizational Facilitators has focused on schools, districts, and state education agencies as they have moved in new directions for student and learning supports. The following appendices provide a brief overview of the type of intervention innovations being introduced and facilitated by the change agents and the major phases, steps, and tasks involved, as well as a sampling of related resources.

Appendix A

A Unifying Intervention Framework for Schools and Districts to Address Barriers to Learning and Teaching

Appendix B

Overview of Major Steps Related to Establishing a Comprehensive, Multifaceted, and Cohesive Component for Addressing Barriers to Learning at a School Site (A Learning Supports or Enabling Component)

Appendix C

A Sample of Center Resources for Developing a Comprehensive System of Learning Supports

Appendix A

A Unifying Intervention Framework for Schools and Districts to Address Barriers to Learning and Teaching

Schools are constantly confronted with another project, another program, another initiative to address students' learning, behavior, and emotional problems, make school safe, and/or promote healthy development. This raises concerns about: *How does it all fit together?*

Because so many programs have evolved in a piece meal manner, across the country it is not unusual for staff in a district and at a school to be involved in "parallel play." This contributes to widespread counterproductive competition and wasteful redundancy. Effectiveness is compromised. So are efforts to take projects, pilots, and demonstration programs to scale. This raises concerns about: *What systemic changes are needed?*

One response to all this has been the call to enhance coordination among the many overlapping programs, services, and initiatives. Clearly, a more unified and cohesive approach is needed. However, the emphasis on enhancing coordination is insufficient for addressing the core problem which is *marginalization* in school policy, planning, and practices of the whole enterprise devoted to addressing barriers to learning.

Below we delineate a unifying intervention framework and an integrated infrastructure for the many initiatives, projects, programs, and services schools pursue in addressing barriers to learning and promoting healthy development.

A Unifying Concept for Ending Marginalization & Fragmentation of Learning Supports

The unifying concept of an *Enabling or Learning Supports Component* is presented as an umbrella under which the many fragmented initiatives, projects, programs, and services can be pulled together. That is, such a Component can house all efforts to prevent and minimize the impact of the many problems interfering with learning and teaching and can do so in ways that maximize engagement in productive learning and positive development. For the school and community as a whole, the intent is to produce a safe, healthy, nurturing environment characterized by respect for differences, trust, caring, and support.

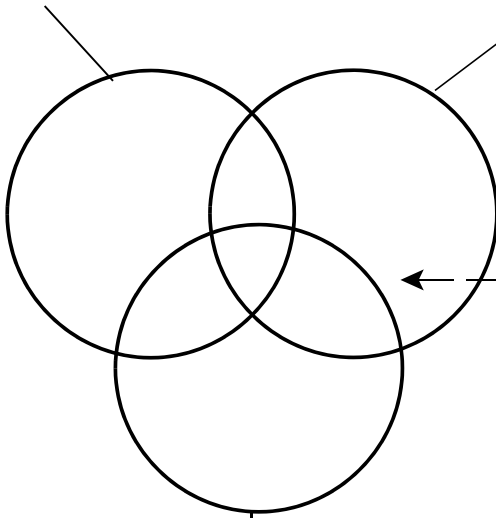
An Enabling or Learning Supports Component focuses on enhancing policy and strategic collaboration to develop comprehensive approaches that maximize learning and in the process strengthen the well-being of students, families, schools, and neighborhoods. This is accomplished by fully integrating the enterprise into a school's efforts to improve instruction (see Figure on next page).

Given the current state of school resources, efforts to establish and institutionalize an Enabling or Learning Supports Component clearly must be accomplished by rethinking and redeploying how existing resources are used. The work requires weaving school owned resources and community owned resources together to develop comprehensive and cohesive approaches. The work also must take advantage of the natural opportunities at schools for addressing learning, behavior, and emotional problems and promoting personal and social growth.

Needed: Revised Policy to Establish an Umbrella for School Improvement Planning Related to Addressing Barriers to Learning and Promoting Healthy Development

Direct Facilitation of Learning
(Instructional Component)

Addressing Barriers to Learning & Teaching
(Enabling or Learning Supports Component –
an umbrella for ending marginalization by unifying
the many fragmented efforts and evolving a
comprehensive approach)



Governance and Resource Management
(Management Component)

Examples of initiatives, programs, and services

- >positive behavioral supports
- >programs for safe and drug free schools
- >full service community schools & Family Resource Ctrs
- >Safe Schools/Healthy Students
- >School Based Health Center movement
- >Coordinated School Health Program
- >bi-lingual, cultural, and other diversity programs
- >compensatory education programs
- >special education programs
- >mandates stemming from the No Child Left Behind Act
- >And many more activities by student support staff

A Continuum of Interventions to Meet the Needs of All Children and Youth

An Enabling or Learning Supports Component is operationalized into a comprehensive, multifaceted, and cohesive framework that incorporates two frameworks. One is the continuum framing the scope of desired intervention; the other is a conceptualization that organizes the “content” of efforts for addressing barriers to learning and teaching and does so with appreciation of the role played by efforts to promote healthy development.

By viewing programs, services, projects, and initiatives along a continuum of student needs, schools and communities are more likely to provide the right interventions for the right students at the right time. Such a continuum encompasses efforts to positively affect a full spectrum of learning, physical, social-emotional, and behavioral problems in every school and community by

- promoting healthy development and preventing problems
- intervening as early after the onset of problems as is feasible
- providing special assistance for severe and chronic problems.

Such a continuum encompasses efforts to enable academic, social, emotional, and physical development and address learning, behavior, and emotional problems at every school. Most schools have some programs and services that fit along the entire continuum. However, the tendency to focus mostly on the most severe problems has skewed things so that too little is done to prevent and intervene early after the onset of a problem. As a result, the whole enterprise has been characterized as a “waiting for failure” approach.

Framing the Content of Learning Supports

Pioneering efforts have operationalized the content of an Enabling or Learning Supports Component into six programmatic arenas. In effect, they have moved from a “laundry-list” of programs, services, and activities to a defined content or “curriculum” framework that categorizes and captures the essence of the multifaceted ways schools need to address barriers to learning.

The six content arenas organize learning supports into programs for

- *enhancing regular classroom strategies to enable learning* (e.g., improving instruction for students with mild-moderate learning and behavior problems and re-engaging those who have become disengaged from learning at school)
- *supporting transitions* (e.g., assisting students and families as they negotiate school and grade changes, daily transitions, etc.)
- *increasing home and school connections*
- *responding to, and where feasible, preventing school and personal crises*
- *increasing community involvement and support* (e.g., outreach to develop greater community involvement and support, including enhanced use of volunteers)
- *facilitating student and family access to effective services and special assistance as needed.*

Combining the continuum of interventions with the six content arenas provides a “big picture” of a *comprehensive, multifaceted, and integrated approach*.

The resulting matrix (see the next page) creates a unifying umbrella framework to guide rethinking and restructuring of the daily work of all staff who provide learning supports at a school. When it is used as a tool for mapping and analysis of resources and identifying gaps and redundancies, it helps increase effectiveness and efficiency of the supports for learning.

For more on this, see the resources and references in Appendix C.

Matrix for reviewing scope and content of a component to address barriers to learning.*

		Scope of Intervention		
		Systems for Promoting Healthy Development & Preventing Problems	Systems for Early Intervention (Early after problem onset)	Systems of Care
Organizing around the Content/ “curriculum” (for addressing barriers to learning & promoting healthy development)	Classroom- Focused Enabling			
	Crisis/ Emergency Assistance & Prevention			
	Support for transitions			
	Home Involvement in Schooling			
	Community Outreach/ Volunteers			
	Student and Family Assistance			
		Accommodations for differences & disabilities	Specialized assistance & other intensified interventions (e.g., Special Education & School-Based Behavioral Health)	

*Note that specific school-wide and classroom-based activities related to positive behavior support, “prereferral” interventions, and the eight components of Center for Prevention and Disease Control’s Coordinated School Health Program are embedded into the six content (“curriculum”) areas.

Appendix B

Overview of Major Steps Related to Establishing a Comprehensive, Multifaceted, and Cohesive Component for Addressing Barriers to Learning at a School Site (A Learning Supports or Enabling Component)

At any site, key stakeholders and their leadership must understand and commit to systemic changes for the proposed innovation; commitment must be reflected in policy statements and an infrastructure that ensures essential leadership, resources, motivation, and capability.

First Phase – Orientation: Creating Readiness

- 4) Build interest and consensus for enhancing efforts to address barriers to learning by developing the component
- 5) Introduce basics of the component to relevant groups of stakeholders
- 3) Establish a school-wide policy framework and commitment – the leadership at a site should make a commitment that adopts a comprehensive approach to enabling learning by addressing barriers as a primary and essential component of school improvement
- 4) Identify a site leader (equivalent to the leader for the Instructional Component) to ensure policy commitments are carried out for establishing the new component

Second Phase – Start-up and Phase-in: Developing a Plan of Action, Starting-up, Phasing-in, Building Infrastructure and Capacity

- 5) Establish the temporary infrastructure mechanisms (e.g., a site steering group and change team) and develop the capacity of the change agents to guide and manage change and provide essential leadership as the component is phased in
- 6) Formulate specific start-up and phase-in plans
- 7) Ensure there is a resource-oriented mechanism, such as a Learning Supports Leadership Team, at each school and train those staffing the mechanism in how to perform its functions (e.g., mapping, analysis, coordinating, planning, setting priorities for program development, enhancing intervention systems)
- 8) Help organize work groups for component arena development
- 9) Refine school operational infrastructure so that the component is fully integrated with the instructional and management components.
- 10) Develop ad hoc work groups to enhance component visibility, communication, sharing, and problem solving
- 11) Attempt to fill program/service gaps and pursue economies of scale through outreach designed to establish formal collaborative linkages with other schools in the feeder pattern and with district-wide and community resources (e.g., through establishing a Learning Supports Leadership Council for the feeder pattern)
- 12) Establish a system for quality improvement and evaluation of impact and integrate it into the site's quality school improvement planning, evaluation, and accountability

Third and Fourth Phases – Sustaining and Evolving: Increasing Outcome Efficacy and Ensuring Creative Renewal

- 13) Plan for maintenance
- 14) Develop strategies for maintaining momentum and progress
- 15) Generate renewal

Appendix C

A Sample of Center Resources for Developing a Comprehensive System of Learning Supports

Pioneering Initiatives are Underway!

In motion across the country are trailblazing initiatives by state education agencies and school districts (e.g., in Louisiana, Iowa, Georgia, Florida, Arizona – see <http://smhp.psych.ucla.edu/summit2002/trailblazing.htm>).

For example:

- Over the past two years, Louisiana's Department of Education has developed its design for a *Comprehensive Learning Supports System* and has begun district-level work. The design has been shared widely throughout the state; positions for Regional Learning Supports Facilitators have been created; and implementation is underway with first adopters (<http://www.louisianaschools.net/lde/uploads/15044.pdf>).
- A nationwide initiative by the American Association of School Administrators (AASA) in collaboration with our center at UCLA and Scholastic aims at expanding leaders' knowledge, capacity, and implementation of a comprehensive system of learning supports (<http://www.aasa.org/content.aspx?id=7264>).
- In the Tucson Unified School District, the process of unifying student and learning supports into a comprehensive system has begun with the employment of a cadre of Learning Supports Coordinators to help with the transformation at each school (http://www.tusd.k12.az.us/contents/depart/learningsupport_es/index.asp <http://smhp.psych.ucla.edu/pdfdocs/wheresithappening/tusdbrochure.pdf>).

Such pioneers are moving forward to better balance cut-backs across all three components and to use remaining resources in ways that begin system building for the future.

SEE THE BROCHURES & PAMPHLETS

- > Hawaii - Comprehensive Student Support System (CSSS)
http://doe.k12.hi.us/programs/csss/csss_pamphlet.pdf
- > Louisiana - Overview of the state's Comprehensive Learning Supports System
<http://smhp.psych.ucla.edu/summit2002/lalearningsupport.pdf>
- > Ohio - Student Success: A Comprehensive System of Learning Supports
<http://education.ohio.gov/GD/DocumentManagement/DocumentDownload.aspx?DocumentID=54970>
- > Tucson Unified School District - Learning Supports System
<http://smhp.psych.ucla.edu/pdfdocs/wheresithappening/tusdbrochure.pdf>
- > Indian River County Public School District (FL) - Learning Supports Collaborative
<http://smhp.psych.ucla.edu/aasa/irlsc.pdf>

REVIEW THE MAJOR DESIGN DOCUMENTS

- > Louisiana Department of Education – <http://www.louisianaschools.net/lde/uploads/15044.pdf>
- > Iowa Department of Education – http://educateiowa.gov/index.php?option=com_docman&task=doc_download&gid=2588
- > Gainesville City Schools – <http://smhp.psych.ucla.edu/aasa/aasagainesville.pdf>

Here's Some Resources for Learning More

ONE HOUR INTRODUCTORY WEBINAR

Our Center developed this introduction in collaboration with the American Association of School Administrators and Scholastic. It is entitled: *Strengthening School Improvement: Developing a Comprehensive System of Learning Supports to Address Barriers to Learning and Teaching*. <https://scholastic.webex.com/scholastic/lsr.php?AT=pb&SP=TC&rID=48915112&rKey=09f14db0881f5159&act=pb>

ONLINE LEADERSHIP INSTITUTE

If the presentation whets your appetite, you and your colleagues can go into greater depth on the various topics by accessing the online Leadership Institute modules we developed in collaboration with Scholastic's Rebuilding for Learning initiative as aids in planning and system building for better addressing barriers to learning and teaching and re-engaging disconnected students. These webinar sessions are online at - <http://rebuildingforlearning.scholastic.com/>

The six module online institute currently includes discussion of:

- I. Why new directions for student and learning supports is an imperative for school improvement.
- II Framing a comprehensive intervention system to address barriers to learning and teaching and re-engage disconnected students.
- II Reworking school and district operational infrastructure and policy to effectively build such a system.
- IV Expanding professional development related to engagement and re-engagement to include an enhanced understanding of intrinsic motivation.
- V. School transformation in terms of systemic change phases and tasks.
- II Planning and strategically pursuing implementation of a Comprehensive System of Learning Supports as an integrated part of school improvement.

BOOKS

Adelman, H.S., & Taylor, L. (2006a). *The implementation guide to student learning supports in the classroom and schoolwide: New directions for addressing barriers to learning*. Thousand Oaks, CA: Corwin Press.

Adelman, H.S., & Taylor, L. (2006b). *The school leader's guide to student learning supports: New directions for addressing barriers to learning*. Thousand Oaks, CA: Corwin Press.

HANDBOOK

Adelman, H.S., & Taylor, L. (2008). *Rebuilding for learning: Addressing Barriers to learning and teaching, and re-engaging students*. NY: Scholastic, Inc. <http://smhp.psych.ucla.edu/rebuild/RebuildingV11RD28.pdf>

SOME ONLINE CENTER DOCUMENTS ABOUT THE WORK

Toward next steps in school improvement: Addressing barriers to learning and teaching.
<http://smhp.psych.ucla.edu/pdfdocs/systemic/towardnextstep.pdf>

Frameworks for systemic transformation of student and learning supports.
<http://smhp.psych.ucla.edu/pdfdocs/systemic/frameworksforsystemictransformation.pdf>

Funding stream integration to promote development and sustainability of a comprehensive system of learning supports. <http://smhp.psych.ucla.edu/pdfdocs/fundingstream.pdf>

Improving Outcomes for Students and Schools Requires a Comprehensive System of Learning Supports. <http://smhp.psych.ucla.edu/pdfdocs/improvingoutcomes.pdf>

Addressing Barriers to Student Learning & Promoting Healthy Development: A Usable Research-Base. <http://smhp.psych.ucla.edu/pdfdocs/briefs/BarriersBrief.pdf>

Cut-Backs Make it Essential to Unify and Rework Student and Learning Supports at Schools and Among Families of Schools. <http://smhp.psych.ucla.edu/pdfdocs/cutbacks.pdf>

What every leader for school improvement needs to know about student and learning supports.
<http://smhp.psych.ucla.edu/pdfdocs/whateveryleader.pdf>

Moving beyond the three tier intervention pyramid: Toward a comprehensive framework for Student and learning supports. <http://smhp.psych.ucla.edu/pdfdocs/briefs/threetier.pdf>

Establishing a comprehensive system of learning supports at a school: Seven steps for principals and their staff. <http://smhp.psych.ucla.edu/pdfdocs/7steps.pdf>

Leadership at a School Site for Developing a Comprehensive System of Learning Supports.
<http://smhp.psych.ucla.edu/pdfdocs/studentssupport/toolkit/aidd.pdf>

Key leadership mechanisms for enhancing student & learning supports
http://smhp.psych.ucla.edu/pdfdocs/Report/resource_oriented_teams.pdf

What is a learning supports leadership team?.
http://smhp.psych.ucla.edu/pdfdocs/Report/resource_oriented_teams.pdf

Infrastructure for learning supports at district, regional, and state offices
<http://smhp.psych.ucla.edu/pdfdocs/studentssupport/toolkit/aidk.pdf>

Learning Supports and Small Schools.
<http://smhp.psych.ucla.edu/pdfdocs/learningsupportssmallschools.pdf>

What Might a Fully Functioning Enabling or Learning Supports Component Look Like at a School? <http://smhp.psych.ucla.edu/summit2002/whatmightfully.pdf>

Personalizing Personnel Development at Schools: A Focus on Student Engagement and Re-engagement. <http://www.smhp.psych.ucla.edu/pdfdocs/engagement.pdf>

Framing new directions for school counselors, psychologists, & social workers.
<http://smhp.psych.ucla.edu/pdfdocs/Report/framingnewdir.pdf>

School improvement planning: What's missing? <http://smhp.psych.ucla.edu/whatsmissing.htm>

Addressing what's missing in school improvement planning: Expanding Standards and Accountability to Encompass an Enabling or Learning Supports Component.
<http://smhp.psych.ucla.edu/pdfdocs/enabling/standards.pdf>

Resource mapping and management to address barriers to learning: an intervention for systemic change.

<http://smhp.psych.ucla.edu/pdfdocs/resourcemapping/resourcemappingandmanagement.pdf>

Another initiative? Where does it fit? A unifying framework and an integrated infrastructure for schools to address barriers to learning and promote healthy development..

<http://smhp.psych.ucla.edu/pdfdocs/infrastructure/anotherinitiative-exec.pdf>

TOOLKIT

Includes many resources for Rebuilding Student Supports into a Comprehensive System for Addressing Barriers to Learning and Teaching

<http://smhp.psych.ucla.edu/summit2002/resourceaids.htm>

For books on team building, see <http://www.questia.com/search/building-teamwork> -

For quick “tips” on team building, see Heathfield, S.M. (2011). *Twelve tips for team building: How to build successful work teams; how to make teams effective*. About.com Guide.

http://humanresources.about.com/od/involvementteams/a/twelve_tip_team.htm

Also see www.buzzle.com/articles/teamwork

For some resource aids for developing a leadership team for an enabling or learning supports component, see the Center’s toolkit for *Rebuilding Student Supports into a Comprehensive System for Addressing Barriers to Learning and Teaching*

<http://smhp.psych.ucla.edu/summit2002/resourceaids.htm> .

WANT MORE INFORMATION ABOUT ANY OF THIS?

For additional resources related to understanding how schools can better address barriers to learning and teaching and re-engage disconnected students, see <http://smhp.psych.ucla.edu>

The resources cited can be used for professional development related to system development and specific interventions to enhance equity of opportunity for students to succeed at school.

For anyone ready to begin the work described in this report, a good starting point is the guidance document entitled:

*Establishing a Comprehensive System of Learning Supports at a School:
Seven Steps for Principals and Their Staff*

online at - <http://smhp.psych.ucla.edu/pdfdocs/7steps.pdf>

And feel free at any time to email Ltaylor@ucla.edu or adelman@psych.ucla.edu or the center email smhp@ucla.edu