



# **SIM: STRATEGIC INTERVENTION MODEL**

COLLABORATION GUIDE FOR  
SUPPORTING TEACHERS AND  
STUDENTS WITH CHALLENGING  
BEHAVIOR IN A SCHOOL SETTING

**momentous**  
**institute®**

Powered by Salesmanship Club since 1920

Strategic Intervention Model (SIM)

© 2019 Momentous Institute

All Rights Reserved. No part of this material may be reproduced without written permission from Momentous Institute.

[www.momentousinstitute.org](http://www.momentousinstitute.org)

# TABLE OF CONTENTS

ABOUT MOMENTOUS INSTITUTE.....	1
ABOUT SOCIAL EMOTIONAL HEALTH .....	2
HOW TO USE THIS MANUAL .....	3

## PART ONE: WHAT IS SIM? .....5

WHAT IS SIM?	
WHAT SIM IS .....	6
WHAT SIM IS NOT .....	6
WHY WE BELIEVE SIM IS NECESSARY...	7
HOW SIM FLOWS .....	9
PARTS OF SIM .....	10
ASSESSMENTS .....	10
INTERVENTIONS .....	10
MEETINGS .....	11
POSTURES .....	12
RESPECT .....	12
TRUST .....	12
COLLABORATION.....	12
CURIOSITY .....	13
SELF-REFLECTION .....	13
TRAUMA LENS .....	14
EQUITY LENS .....	15
SUGGESTED LANGUAGE STEMS.....	16

## PART TWO: SETTING UP FOR SIM ....17

BEFORE BEGINNING SIM .....	18
BUILD AWARENESS .....	18
INTRODUCTION .....	18
SETTING UP THE THREE PARTS .....	22
ASSESSMENTS .....	22
INTERVENTIONS .....	24
MEETINGS .....	24
SCHEDULING MEETINGS .....	26
MEETING EXPECTATIONS .....	27

## **PART THREE: HOW TO DO SIM .....28**

YEARLONG OVERVIEW .....	29
THE INTRODUCTORY MEETING .....	30
THE REMAINING MEETINGS .....	32
THE FINAL MEETING.....	33
SAMPLE MEETING .....	34
FREQUENTLY ASKED QUESTIONS .....	38

## **PART FOUR: RESOURCES .....39**

PRE-MEETING TEMPLATE.....	40
MEETING NOTES .....	41
NOTE-TAKER TEMPLATE .....	42
RECOMMENDATION FORM .....	43
SAMPLE SET OF NOTES.....	44
CONCLUSION .....	51

## ABOUT MOMENTOUS INSTITUTE

Momentous Institute, owned and operated by Salesmanship Club of Dallas, has been building and repairing social emotional health with children, families and communities since 1920. Each year, the organization walks side-by-side with over 5,500 children and family members through innovative education and therapeutic services. The organization also invests in research and training, including the annual Changing the Odds conference, to reach far more children than could ever be served directly. The combined support of Salesmanship Club of Dallas, the AT&T Byron Nelson, corporations, individuals and foundations enables these efforts and truly changes the odds for children in our community and beyond.

### MOMENTOUS INSTITUTE THERAPEUTIC SERVICES

Since 1920, children and families have worked alongside Momentous Institute's Therapeutic Services staff to develop strong relationships, social emotional health and academic success. We offer a range of therapeutic services, including Camp Momentous, family therapy sessions with trauma-informed therapists, play therapy with young children and "Huddle Up" groups with adolescents. Using a strengths-based approach, children and families are able to walk through trauma, conflict and other challenges as they build social emotional health.

### MOMENTOUS SCHOOL

Momentous School, a Momentous Institute program founded in 1997, is a laboratory school located in the Oak Cliff community of Dallas. The school serves children ages three years old through fifth grade. Using decades of research and smaller classroom settings, Momentous Institute tailors its approach to the specific needs of each child and their family as they walk through rigorous curriculum, woven with rich experiences on social emotional health. Eligible students are those who qualify for a free or reduced lunch.

## CONTRIBUTORS

Maria Christiansen  
Coral Davis  
Méroudjie Denis  
Vickie Echols  
Maureen Fernandez  
Stephanie McGary  
Sandy Nobles  
Karen Norris  
Karen Thierry  
Laura Vogel  
Teachers of Momentous School

# ABOUT SOCIAL EMOTIONAL HEALTH

Social emotional health is the ability to manage one's emotions, reactions and relationships. Children with strong social emotional health demonstrate self-control, communicate well, problem solve, are empathetic, grateful, resilient, optimistic and compassionate. Basically, all of the traits we admire in our peers — the people with whom we want to work and be friends. Every child needs to develop social emotional skills to be successful in school and in life. Children faced with trauma, abuse, poverty and other obstacles have to overcome even more to learn in school and be successful. At Momentous Institute, we help kids understand their brain, learn how to cope in difficult situations and empower them to be their strongest and brightest selves.

We conceptualize the development of social emotional health using this stair-stepped approach. You will notice the base of the entire model is safe relationships. Children need safe relationships in order to begin working on these steps.



In the context of safe relationships, kids can begin working on self-regulation. This is the ability for a child to be in control of her actions and reactions. It involves learning the basics of the brain, using breath as an anchor, connecting the brain and body, managing feelings and controlling impulses.

The next step, awareness of self, helps students develop a strong sense of gratitude and the skills of optimism, grit and resilience.

When a child is self-aware, she is better able to understand others. She can understand the perspective of a peer and can express empathy for others.

Lastly, a child who has developed strong skills in the first three steps is better positioned to become a Changemaker. Changemakers are the people in the community who are making a positive difference. They are happy, productive, engaged in meaningful relationships and contribute to the greater good by showing compassion and having a strong sense of hope for a better future.

## HOW TO USE THIS MANUAL

This guidebook provides a framework with practical steps and examples for implementation in schools. The guide serves as a resource when designing a system for how to respond and instruct students to meet school expectations with effective social interactions and emotional behaviors.

The guide may be used in training for professional development purposes with teachers, educators, service providers and campus/district level leaders.





# **PART ONE**

## **WHAT IS SIM?**

## WHAT SIM IS

The **Strategic Intervention Model**, or **SIM** as it is referred to in this guide, is a process by which teachers and school support staff, including mental health professionals and administrators, **team up to provide comprehensive support to teachers** who experience difficulty managing students who are struggling socially, emotionally, behaviorally and/or academically.

In short, each student is evaluated on a variety of measures and based on this data, students are identified who require additional support. Teachers work through interventions throughout the year designed to target specific skills. These interventions and their results are discussed during monthly meetings between teachers and other school personnel.

Monthly meetings are collaborative, problem-solving touch points where everyone around the room shares updates and suggestions, asks questions and identifies an action plan for the following month.

This process is designed to provide the necessary additional support for targeted students and also benefits the teachers who learn critical skills for managing challenges for the whole class, or for future students who may demonstrate similar needs. The end result is a school that is more collaborative and has a greater tool box of social emotional skills to support student development and performance.

## WHAT SIM IS NOT

**SIM is not another add-on to bog down the to-do list.** SIM is a top priority for any school who wants to ensure that each student has the opportunity and the ability to succeed. SIM will not work if it is used sporadically or without fidelity. Skipping monthly meetings, sending substitutes or failing to complete the work in between sessions will affect the results of this program. If it is seen as another item on the to-do list, and one that can be bumped to the bottom, its ability to be helpful will be compromised.

**SIM is not in competition with other social emotional and academic support measures** in place at a school. Rather, it is a complement to them. Whatever systems are currently in operation at a school can fold nicely into the SIM process or vice versa. SIM is designed to be fluid and fit within a school's existing context. Any efforts that teachers and students are already doing to bolster the social, emotional, behavioral and academic needs of their students becomes part of the process.

**SIM is not a teacher evaluation system.** SIM simply cannot be used to critique the work of teachers. The point of SIM is to collaborate with teachers and team up to best serve students. If it becomes a "gotcha" experience for teachers, the process loses its integrity. It only works if the space is safe and collaborative, and teachers feel that everyone in the room is on the same page working to support them in meeting the needs of students.

# WHY WE BELIEVE SIM IS NECESSARY

SIM is an integral part of a healthy social emotional school culture for several reasons.

## COLLABORATION LEADS TO RELATIONSHIPS

First, a school who adopts a culture of collaboration **builds relationships**. When teachers, staff and students have stronger relationships among each other, the culture is strengthened. Safe relationships are the foundation of social emotional health and the base upon which all other competencies can be accomplished. Students cannot learn in an environment where they do not feel safe, and likewise, teachers cannot do their best work in an environment where they feel disconnected from their colleagues or the full support of school administration. The work of SIM is to reach the end goal of **supporting individual students**, but along the way, relationships are formed and the fabric of the school culture is strengthened.

## SHARED RESPONSIBILITY

Another reason SIM is important is because it sends a message that an issue in the classroom is not just the teacher's responsibility to solve. Rather, teachers are told that issues that impact students are **the work of everyone to help solve**. Administrators, counselors, and anyone else participating in the meetings take equal responsibility to help figure out how to best support every student. This makes teachers feel less alone when facing challenges and gives everyone ownership over the process of creating a socially emotionally healthy school.

## CLARITY IN COMPLEXITY

Lastly, SIM gives those who don't spend every moment of the day in the classroom a **deeper understanding of what happens** in the school. Administrators get a better sense of the complexity of the work with students, learn more about which students need support and better understand how teachers interact with students. This deeper knowledge is invaluable in being a supportive administrative team who can make decisions that positively influence the culture, based on a deep understanding of what is needed.

## ALIGNED WITH MULTI-TIERED APPROACH

The SIM process is a framework that is informed by a multi-tiered system of support (MTSS) and the Response to Intervention (RTI) Model, and uses a social emotional lens to support academic success. The RTI model was created by the RTI Action Network, a program of the National Center for Learning Disabilities, and is a multi-tier approach to identification and support of students with learning and behavior needs. For more on the RTI model, visit [rtinetwork.org](http://rtinetwork.org). The SIM process, as with the RTI model, includes the use of three tiers to describe types of intervention. The SIM process offers the opportunity to design Tier 2 targeted interventions that support specific students in need of something more.

## **TIER 1: FOUNDATIONAL**

ALL students receive high-quality instruction and are screened periodically in order to identify students who need additional support. All students benefit from Tier 1 high-quality instruction. Effective schools have a strong foundation with Tier 1 interventions in place that benefits all students. Interventions may include a social emotional curriculum and instructional practices that are implicitly woven throughout the day, such as routines, procedures, and most importantly:

- High Quality Environments
  - Inclusive, safe and supportive
  - Connected home environments
- Nurturing and Responsive Relationships
  - Safe and consistent interactions
  - Inclusive communication with other children and adults

## **TIER 2: TARGETED**

Students who are not making progress in the Tier 1 instruction are provided with targeted, intensive instruction designed to meet their unique needs. These interventions include:

- Explicit instruction and support
- Small group interventions to teach skills such as self-regulation, expressing and understanding emotions, developing social relationships and problem-solving

## **TIER 3: INDIVIDUALIZED**

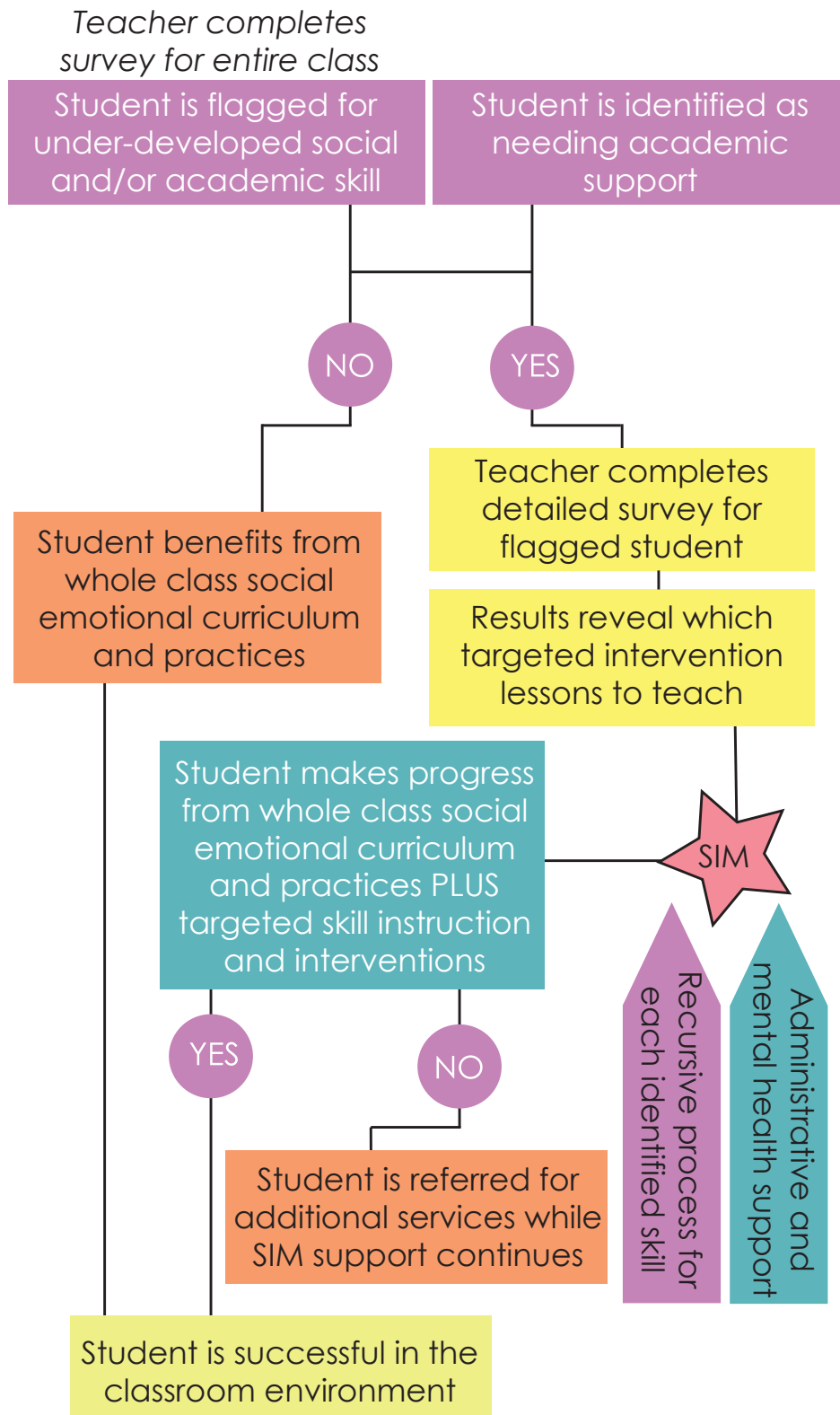
Students who are not able to show progress as a result of Tier 2 intervention are considered for more intensive Tier 3 interventions. In this tier, students receive more intensive individualized instruction. If students do not show measurable progress after this level of intervention, they are referred for a comprehensive evaluation to determine possible eligibility for special education services.

- Family-centered, comprehensive interventions
- Assessment-based
- Skill-building

When students need additional layers of support - duration or frequency of instruction - it's time to discuss solutions in a collaborative, problem-solving SIM Meeting, where everyone around the room shares updates and suggestions, asks questions and identifies an action plan for the following month. The SIM process offers the opportunity to design Tier 2 targeted interventions that support specific students in need of something more.

Students who have needs identified as Tier 3 may also be included in the SIM process, but will require more time outside the monthly meetings to design individualized support.

## HOW SIM FLOWS



# PARTS OF SIM

The SIM process includes three components: **assessments, interventions and monthly meetings.**

## 1. ASSESSMENTS

Assessments are critical to the SIM process because they provide evidence and a common view of the problems to address. Although there are many ways to capture the necessary information that will inform which students should be part of the SIM process, it is critical to use a uniform assessment for every student.

Effective comprehensive assessments measure specific aspects: student's social awareness, self-regulation skills and relationship skills as well as academic skills and motivation. More information about specific assessment requirements is found in the next section.

## 2. INTERVENTIONS

Many social emotional health curricula have interventions, or lessons, that provide support to students targeted to specific skills. When deciding which intervention is most effective, consider the following criteria:

### INTERVENTION MATCHES NEED

The interventions used in the SIM process should be explicitly linked to the area identified in the assessment in need of support. Lessons should be grounded in theory that link the lesson to the targeted area of support.

For example, a student who is struggling with relationship building may benefit from a lesson about cooperation between peers or empathy building. It is important to understand which skill, for this student, is connected to challenges with relationship building. This lesson would explicitly target the identified skill, especially if the student is coupled with another student to practice. However, if a student is struggling with relationship building, then a lesson on asking for help or following the rules may not be appropriate.

### INTERVENTION IS TRACKED

The interventions should be based on a behavior that the teacher has tracked.

In the example above, a student who is having a hard time with relationship building will need an intervention targeted to that specific skill. Yet within that skill, there are many

factors. A student may have a hard time building relationships on the playground or during unstructured play, but does well during group projects. Or a student may have a hard time building relationships with one group of students but not others, such as groups based on gender or race or interest. In either of these examples, not only should the lesson target relationship building as indicated on the assessment, it should also target specific behavior tracked over time in the classroom.

## **INTERVENTION IS CONNECTED**

The interventions should be connected to a framework or program.

It is beneficial to students to have continuity and consistency throughout the year. Though there are certainly ample resources online for interventions or lessons that can target the skills, the best interventions will be related and connected, not random. That may mean that all of the lessons are part of one social emotional health curriculum or program, or that all link to the same framework.

## **3. MEETINGS**

Monthly meetings are the heart of the SIM process. In these collaborative meetings, teachers have the opportunity to share what they've tried, what is working and what is not. They can ask questions of a wider group and receive suggestions that they may not have considered on their own. These meetings are an amazing opportunity for teachers to gather the collective wisdom of experienced professionals with diverse roles and backgrounds. A timekeeper helps the group use the meeting time more effectively, ensuring that the last five minutes are devoted to action steps moving forward.

Meetings follow a basic agenda:

- Quick recap on student
- Review previous month's action plan
- Review previous month's data (what worked, what didn't work, and how you know it worked/didn't work)
- Open for feedback
- Discussion
- Create next action plan
- Repeat with additional students as needed

# POSTURES

In order for SIM to be successful, the adults in the school must demonstrate certain social emotional health skills. These skills, called postures, govern how people interact with each other and with children. Positive interactions are essential to creating a culture where the SIM process can thrive.

## RESPECT

Adults must always show respect toward each other. Respect is a given, it is not earned based on titles, tenure, or how well-liked an idea is. All people in the building deserve and show respect at all times. Respect shows up through behavior, such as being present and on time to all meetings and coming prepared with the necessary background information. Respect also shows up through interactions such as asking questions in a non-judgmental manner and assuming positive intentions of others in the room.

## TRUST

Trust is an essential element of the SIM process because everyone must trust each other in order to fully show up and contribute. Trust can be broken easily and can be difficult to repair. Everyone involved in the process must trust each other to hold true to their role within the process. Everyone must trust that decisions made in the process are in the best interest of each other and the students.

## COLLABORATION

Collaboration refers to the ability for a group to work together, rather than against each other. Many disciplines are designed for collaboration. Many mental health professions, such as counselors and social workers, build collaboration into their practice. They often discuss cases and collaborate on possible interventions. Doctors in a hospital often collaborate with other medical professionals to make sure they're providing comprehensive and accurate diagnoses and treatment options. Yet teachers are often not provided opportunities to collaborate outside of lesson planning with a grade-level peer. Collaboration makes everyone better. Teachers have access to other ways of viewing a situation, administrators have additional context of what is happening in different grade levels (and can use that to provide comprehensive support across the campus). Coaches, counselors, family guidance support personnel and others in the process can learn valuable insight about what is happening in a student's school day that may influence how they show up in other settings. Collaboration is critical. It is very important that the SIM process shows true collaboration, allowing each person's voice to be heard and valued.



## CURIOSITY

An essential element of providing support to students is curiosity. Any one adult in a child's life rarely knows the whole story. When a student is exhibiting challenging behavior, the first step is to chase the why. Adults must ask, "Why is this student doing this?" and, "In what way is this behavior serving this student?" For example, if a student is ripping artwork off the walls, the teacher might wonder, "Why is she pulling the artwork down from the walls?" The teacher then might think of any number of reasons why, such as the student is frustrated that her work doesn't look the way she wanted it to, the student is tired from not sleeping well, the student has witnessed violence in her home or community, or any other possible reason. Then the teacher can wonder, "In what way is pulling down the artwork serving her?" Again, the teacher may be able to identify that the student is pulling artwork down in order to get the teacher's attention, or because she doesn't have any other skills to help her cope with her frustration or anger. When a situation is approached with a sense of curiosity, rather than judgment or blame, the teacher is better equipped to respond in a way that is helpful.

This sense of curiosity also extends into the SIM process. During the SIM process, it is helpful to use curiosity around student behavior. But it is also helpful to extend the same curiosity to teachers and others in the meetings. When unsure about the motivation or rationale behind a decision, curiosity creates space to ask rather than assume.

## SELF-REFLECTION

The SIM process requires all parties to be self-reflective. It is tempting to pass blame on to students who exhibit challenging behavior. But an essential component to all behavior is the posture of the adults in the child's environment. When adults are able to reflect on their own behavior, they are able to shift their own behavior in order to best support students. Adults need to be reflective of their own triggers, such as certain behaviors which cause them to be more upset than other behaviors. For example, a teacher who is self-reflective may notice that behavior that she deems disrespectful upsets her more than behavior that is loud or disruptive. In this example, the teacher can work on reframing "disrespectful" behavior and taking a moment before responding.

## trauma lens

Students who have experienced trauma may exhibit “externalized” behaviors, commonly seen as “acting out”. These behaviors may be disruptive, loud or dangerous. Examples of externalized behaviors include yelling, throwing items, ripping items off walls, kicking, hitting, biting, aggressive language and more. These students are the most likely to be identified as needing support through a process such as SIM. They’re also most likely to receive discipline measures in the absence of a supportive process.

Other students who have experienced trauma may exhibit “internalized” behaviors. These behaviors are considered “acting in”. Students who “act in” may display behavior such as withdrawing, running away, hiding, sleeping, or placing their heads down on their desk. These students often slip through the cracks, because they are often seen as “good” students who don’t cause a scene or disrupt the class.

When doing assessments, it is critical that teachers pay attention to students who exhibit both types of behaviors. Assessments should be designed to capture behaviors that fall into both categories in order to accurately assess, and ultimately support, students who have experienced trauma.

# equity lens

Issues around equity might show up in the way teachers interpret behavior. In the US, Black boys are suspended or expelled at nearly three times the rate of their white peers. American Indian students are also suspended or expelled disproportionately. Girls who are black or American Indian are more likely to receive a suspension or expulsion than girls from any other ethnic category. Yet, when researchers actually observed their behavior, these students were not in fact misbehaving at a higher rate than their white peers, but they were getting higher disciplinary actions. A 2016 study on preschool discipline practices conducted by Gilliam and colleagues found that teachers spent more time watching black children than white children, leading to disproportionately more disciplinary action for the black children. This makes sense, given the more you look for a certain behavior somewhere, the more likely you are to find it. In this study, the idea of implicit bias, which is something most of us have to contend with, was identified as the major factor.

We all carry stereotypes and biases about others. In some ways, this helps our brain work more efficiently, but we have to recognize that our brains aren't perfect. Most of us have an internal model in our head of what "good behavior" looks like- sitting in our seats, silent or speaking quietly, following directions immediately, and saying please/thank you. Any time a student deviates from this, we might perceive their behavior to be defiant or disrespectful, and follow up with consequences. However, this model doesn't account for all the other factors impacting a given behavior.

There are a few questions teachers can ask themselves when encountering difficult student behavior. This first requires you to pause when you see this behavior and check in with yourself first so you can respond calmly to the student. You might ask yourself: Is the student actually acting much different from his/her peers? If not, maybe I need to try to address the problem with the class and not isolate this one student. Is the behavior developmentally and/or culturally appropriate? Remember, there are other ways to be a good student, and that might include appropriate challenges of the teacher or talking with peers. If it really bothers me, how can I teach this student about appropriate behavior in different contexts so he or she can keep learning?

Once we begin to chase the why behind student behavior rather than immediately doling out consequences, we may be surprised by what we learn about our students and ourselves. When we approach our students with a stance of respectful curiosity, we can also better meet their needs. We can be a safe relationship for them and help them to learn the essential skill of self-regulation by modeling it ourselves.

## SUGGESTED LANGUAGE STEMS

### "I WONDER..."

I wonder if the student has anything going on at home that may be impacting his sudden changes in behavior.

I wonder if this behavior is sporadic or consistent.

I wonder if the student has a harder time with male teachers than female teachers.

### SELF-REFLECTION LANGUAGE STEMS:

How am I responding to this behavior?

What is my belief about this behavior?

What is the story I am telling myself about this child? This behavior?

Are there days/times when it seems easier to respond to this behavior?

### WHEN EXPLORING BEHAVIORS, INTERACTIONS AND INTERVENTIONS AS A GROUP, CONSIDER THE FOLLOWING QUESTIONS:

What do we know about this child's temperament? (Is she a perfectionist, keeps emotions bottled up, feels eager to please, tends to get easily overwhelmed?)

What trends or patterns are showing up around the events that lead up to specific interactions or behaviors? (unexpected changes, other children involved, sleep patterns, late arrivals)

How have we noticed this child tends to learn best? (needs to experience things, responds to visuals or dialogue and discussions)

What do we eventually want her to learn? What do we need to teach her?

What would be the effect if this lesson were taught in another way?

What difference do you think it would make if...?

How did you decide...?

What is your hypothesis about why this is happening?

How do you understand the purpose of the behavior?

### ADDITIONAL QUESTIONS TO CONSIDER:

What do we notice about the behaviors that are increasing or decreasing? (number of incidents per day, per week)

What time of day or during what routines/activities do we see an escalation occurring?

What locations are there higher frequencies of behavior incidents?

What motivations might be causing the challenging behaviors?

What social, emotional or communication needs are evident?

Would changes in the classroom staffing account for behaviors or reactions?

How is the family responding to information about these behaviors?

# **PART TWO**

## **SETTING UP FOR SIM**

# BEFORE BEGINNING SIM

## BUILD AWARENESS

Like any new initiative brought into a school, SIM must be introduced to teachers and staff strategically and with intention.

First, teachers must understand what SIM is and how it fits into the larger context of school priorities. Some messages that should be conveyed include:

- SIM is a process that aligns with other social emotional priorities at our school
- SIM is designed to help both students and teachers with social emotional support
- SIM will help students with both academic and behavioral challenges
- SIM is not a process to evaluate teachers; it is strictly for support

Awareness can be achieved by talking about SIM initially at a faculty meeting and with the support of a one pager or other materials. The first month of school, a mock SIM meeting in the schedule will provide a practice run for everyone to get used to the schedule and to get an idea of what to expect.

## INTRODUCTION

To introduce SIM at a faculty meeting, is important that the message is both clear and comprehensive. The goal should be that teachers and staff not leave the meeting feeling either confused or overwhelmed about the new process, however it is wise to expect that confusion will exist and to prepare for ongoing support throughout the process. This first meeting should be close to the start of the first SIM meeting of the year so that there is not too much of a gap between when they first hear about it and when they first practice it.

Use the suggested script on the following pages to help introduce SIM to faculty.



## SAMPLE SCRIPT

"This year we are introducing a new process called SIM, which stands for Strategic Intervention Model. This process is designed to provide additional support for you as you work with students who are struggling socially, emotionally, behaviorally or academically.

We believe that this new process will help us to help these students and will be a supportive space where you will receive strategies to help manage students who are struggling behaviorally and academically.

The process involves several aspects – an assessment, targeted interventions and monthly meetings. We will provide more details on each of these steps as we move through the process, but we want to provide you with enough detail today so you have a general understanding of what to expect.

First, each teacher will complete a screening assessment for every student in the class near the start of the year. These surveys will tell us if a student is identified for an under-developed social and/or academic skill. If students are identified, the teacher completes an additional detailed survey for each of those students. Together we will analyze the results of these surveys and identify targeted interventions that can help build these important skills.

Through monthly meetings with a wide group of people in the school, we'll discuss each student's progress and come up with an action plan to implement for the next month. These meetings are collaborative in nature.

**CONTINUED ...**



## SAMPLE SCRIPT, CONTINUED

Many disciplines are designed for collaboration. Many mental health professions, such as counselors and social workers, build collaboration into their practice. They often discuss cases and collaborate on possible interventions. Doctors in a hospital often collaborate with other medical professionals to make sure they're providing comprehensive and accurate diagnoses and treatment options. Yet teachers are often not provided opportunities to collaborate outside of lesson planning with a grade-level peer. Collaboration makes everyone better. We are all there together in order to come up with the best ways to assist these particular students and to ensure you all feel supported throughout the process.

No part of this process is designed to be evaluative or critical. The whole point is to come together on the same team to support teachers and students. As I mentioned, we'll provide a lot more detail on each of these steps throughout the year, but this is a high-level overview of what to expect.

[Provide schedule for school year's meetings.]

Here is the schedule for meetings for the entire year. These meetings take top priority over any competing conflicts. Because there will be so many people collaborating in the meetings, we cannot schedule makeup days, therefore attendance at these meetings is mandatory and very important. During the first meeting, we will discuss in even more detail about what you can expect over the course of the year.

Are there any questions?

Use the handout on the following page to provide faculty with additional information. Fill in the dates for your SIM calendar before distributing the handout.



Dear Teachers,

This year we are introducing the Strategic Intervention Model (SIM).

### **WHAT:**

SIM is a collaborative process designed to provide additional support for teachers to support students with under-developed social or academic skills.

### **HOW:**

Teachers complete evaluations for each student which help identify necessary skills to target, if applicable. Teachers use various interventions throughout the year designed to target each of these skills. The interventions are evidence-based and pre-written. Teachers and school personnel meet monthly to discuss progress and identify action steps.

### **WHEN:**

Monthly meetings will be held during the same time each month, on the following dates.

### **OUR SCHOOL'S SIM CALENDAR:**

AUGUST \_\_\_\_\_

JANUARY \_\_\_\_\_

SEPTEMBER \_\_\_\_\_

FEBRUARY \_\_\_\_\_

OCTOBER \_\_\_\_\_

MARCH \_\_\_\_\_

NOVEMBER \_\_\_\_\_

APRIL \_\_\_\_\_

DECEMBER \_\_\_\_\_

MAY \_\_\_\_\_

### **YOUR SCHEDULED TIME SLOT: \_\_\_\_\_**

Targeted skill instruction can be done any time during the month.

### **WHY:**

We believe that providing additional support to students who need it will improve academics outcomes, lower instances of behavior challenges and ultimately help students succeed.

A full introduction will be done in detail at the first SIM meeting of the year. We look forward to working on this process together.

# SETTING UP THE THREE PARTS OF SIM

As mentioned, there are three essential elements of the SIM process: **the assessment, the interventions and the meetings**. This section explores how to set up each of these three elements.

## 1. ASSESSMENTS

Administer assessments no sooner than four weeks into the school year, to allow teachers an opportunity to observe their students' interactions in the classroom and to understand personalities and classroom dynamics.

Within four to six weeks, the teacher will complete one general assessment per student in the class. Ideally, this is a short screener. It is important that teachers complete one for each student, not just those who come to mind when thinking of students who may need additional support. Sometimes the assessment results are surprising and reveal student needs not observed before the individualized session.

Students who show need for improvement in one or more areas are considered candidates for SIM. They are then evaluated on a separate, more detailed measure. This measure should assess students more in depth on specific classroom behaviors, such as the ability to ask for help, using appropriate language when upset, and participation in classroom activities. Upon completion of this second measure, teachers can identify which skill areas to target during the SIM process.

In short, the first screener tells teachers which students may need support and the second assessment confirms which students need support and tells teachers in what areas they need support.

*Momentous Institute uses the SSIS SEL Edition Screening/Progress Monitoring Scales (Pearson) as the classroom wide screener, and the SSIS SEL Edition Teacher Form (Pearson) as the more detailed student assessment. It is understood that not every context will be able to adopt the same assessments, due to staff and financial limitations. It is recommended that any assessment is a valid and reliable assessment for the grade levels of interest and does not take more than 30 minutes to complete for a classroom of students. It is highly recommended that there are interventions linked to the assessment results that are easily accessible for teachers. More on interventions linked to assessment is in the following pages.*

## ASSESSMENT CHECKLIST:

- ☐ Select a uniform assessment for every student that measures specific aspects
- ☐ Administer screening no sooner than four weeks into the school year
- ☐ Complete one general assessment per student in the class
- ☐ Select students based on need for improvement in one or more areas as candidates for SIM
- ☐ Evaluate selected students on a separate, more detailed assessment
- ☐ Identify which skill area(s) to target during the SIM process
- ☐ Teach skills to specific students
- ☐ Monitor progress by collecting evidence
- ☐ Review evidence with the SIM team and revisit skill areas to target
- ☐ Continue the cycle until evidence indicates the need to increase or release support

## 2. INTERVENTIONS

Before the start of the year, targeted interventions should be aligned to the assessment. Ideally, there are interventions connected to a social emotional health curriculum or framework already in place in the school. If not, it is best to find interventions that have a philosophy that is congruent with existing social emotional practices and school culture. It is also recommended that interventions are part of a framework or structure, not individual lessons that don't align with each other.

Interventions must be aligned with each skill identified in the assessment of choice. For example, if the assessment asks about self-awareness, lessons can be identified which teach impulse control or address students who have difficulty concentrating.

Interventions must match the WHY, rather than the lagging skill. Students who have a hard time staying seated during group lessons may have completely different reasons for this behavior. One student may have sensory challenges, another may have a learning difficulty, making concentration difficult. Another may have experienced trauma and is in a state of hypervigilance. Each of these students would need a different intervention to address this behavior. The work of the committee during meetings is to try to identify the why of this behavior.

It is important that interventions are developmentally appropriate for the age group. Three year olds will not have the capacity to sit and listen to a lesson for more than a few minutes, while fifth graders may find overly simplistic language childish and irrelevant. Age and maturity must be taken into consideration when identifying appropriate interventions.

*Momentous Institute uses the SSIS SEL Edition Classwide Intervention Program Manual (Pearson). It is linked to the SSIS-SEL Assessment mentioned previously.*

## 3. MEETINGS

Meetings are where the interventions are brought to life. Meetings allow multiple voices to contribute to the discussion of understanding the why. This alleviates the pressure for the teacher to be the only person trying to understand and manage behavior.

The following roles should be represented in every SIM meeting. Knowing that each school has different titles and responsibilities, below is a brief description of each person's role and what they bring to the SIM meeting conversations:

## **PRINCIPAL AND/OR ASSISTANT PRINCIPAL**

The school's principal has input on many factors of the school's operation and goals and can provide insight on school observations and context. The principal and/or assistant principal has decision-making power and also holds responsibility for the fidelity of the SIM process.

## **SCHOOL COUNSELOR OR OTHER MENTAL HEALTH PROFESSIONAL**

The mental health professional can provide insight on social, emotional and behavioral tasks and challenges that are age and developmentally appropriate. The mental health professional can also support teachers in expanding or adjusting lessons to appropriately support students' unique and individual needs.

## **INSTRUCTIONAL COACH**

The instructional coach can provide insight on academic tasks and challenges that are age and developmentally appropriate.

## **FAMILY GUIDANCE COORDINATOR OR LIAISON (IF APPLICABLE)**

The family liaison can provide context on the family that may be relevant to the child's context, such as knowledge of family changes (like divorce or a move) as well as connect the family to services as needed. In some schools, the mental health professional also serves as the family liaison.

## **GRADE LEVEL TEACHERS (OR TEACHER PAIRS)**

The classroom teachers who work most closely together and who occasionally interact with each other's students should attend together. In most schools, these are grade level partners, but in larger schools with multiple sections of each grade level, teachers should attend in pairs that make logical sense for overlapping knowledge of students. Two teachers together can help provide an alternate view from within the classroom setting or may have additional contextual information that is relevant to the student.

## **NOTE TAKER**

Someone in the meeting must be designated to take notes and send out summaries in a timely manner. This may be someone in an administrative role or one of the above people, however it is not recommended that the teacher or mental health professional be solely responsible for note taking, as doing so may impair their ability to listen and provide feedback.

## FACILITATOR

One of the identified people above is responsible for facilitating the meetings and tracking on time. This person opens up the meetings and recaps previous discussions, reiterates the plan at the closing, and keeps the group on time. This is often the principal but can be any member of the group, but should be the same person for every meeting.

Additional people may be added to this group if it is determined that they provide additional support. However, it is not recommended that people come and go from these meetings or pop in to some and not others. It is important that the same group of people be in the room for every meeting. This dynamic makes it possible for conversations to build upon past conversations, and for a group dynamic to build. Avoid sending replacements for people who are scheduled to attend the meetings.

This is a significant time commitment to gather this large of a group for a full day of meetings each month. However, through our research we have found that SIM is most successful when all of the voices are consistently at the table. In schools where some members of the group only attend some of the meetings, or parts of the meetings, the process is more difficult and the teachers and students struggle to make strides.

*It is not recommended that parents attend these meetings as they are designed to provide teacher support. If the SIM committee decides a conversation with parents is necessary, it should take place at a different time and include only the necessary staff.*

## SCHEDULING MEETINGS

Meetings must be consistent and take top priority above competing demands on time. Suggestions for how to schedule meetings effectively include:

### **SCHEDULE THE YEAR IN ADVANCE**

Meetings should be planned out for the entire school year at the start of the process. These meetings are unchangeable once scheduled and cannot be canceled or rescheduled. Other scheduled events must shift in order to accommodate SIM meetings. Planning the whole year in advance allows all parties involved to block their schedules far enough in advance to deflect potential conflicts. Hosting all meetings on the same day of the month also facilitates a smoother and more targeted process.

### **BE THOUGHTFUL OF TEACHER TIME**

There are two options for scheduling meetings. One is to plan for monthly meetings during teacher planning time and schedule each meeting around the various planning times of the classroom teachers. Another option is to hire a floating substitute so that teachers do not miss planning time. The decision between these two options should be made based on the context of the school schedule and other demands on teachers' time.

## MEETING EXPECTATIONS

### USE STRENGTH-BASED LANGUAGE

Any conversation around students or families should be respectful and strength-based. It is never appropriate to disparage or belittle a family. One way to avoid falling into this trap is to ask the group, particularly any members of the group who have additional family context, “What do we need to know about this situation to see the bigger picture?”

### BE CAREFUL WITH LABELS

It is easier to slip into labels such as “oppositional” or “defiant” when describing a student whose behavior is challenging than it is to do the important work of chasing the why. Any time a member of the group starts using labels that are unsubstantiated or based on opinion, the group should respectfully challenge these labels.

### CONFIDENTIALITY IS KEY

In order for these meetings to be a safe place for teachers to share vulnerabilities and challenges, confidentiality is extremely important. It is not appropriate to share casually any experience that happened in a meeting, either with respect to the adults in the room or the stories of students and families.

It is appropriate to share interventions that worked or were helpful with other teachers facing similar challenges. This level of collaboration is one outcome of instituting a SIM process in the school. Teachers will be better able to support each other through their own experiences. However, in sharing about interventions, it is important that teachers respect the confidentiality of students and only share what is helpful to the other teacher and nothing more.

### CHASE THE WHY WITH THE ADULTS IN THE ROOM

The group should hold the positive assumption that everyone in the room has the best intention to support students. In the event of a challenge, such as a teacher complaining about a student repeatedly, or an individual failing to follow through on an action plan, it is important to chase the why. The group can ask questions such as:

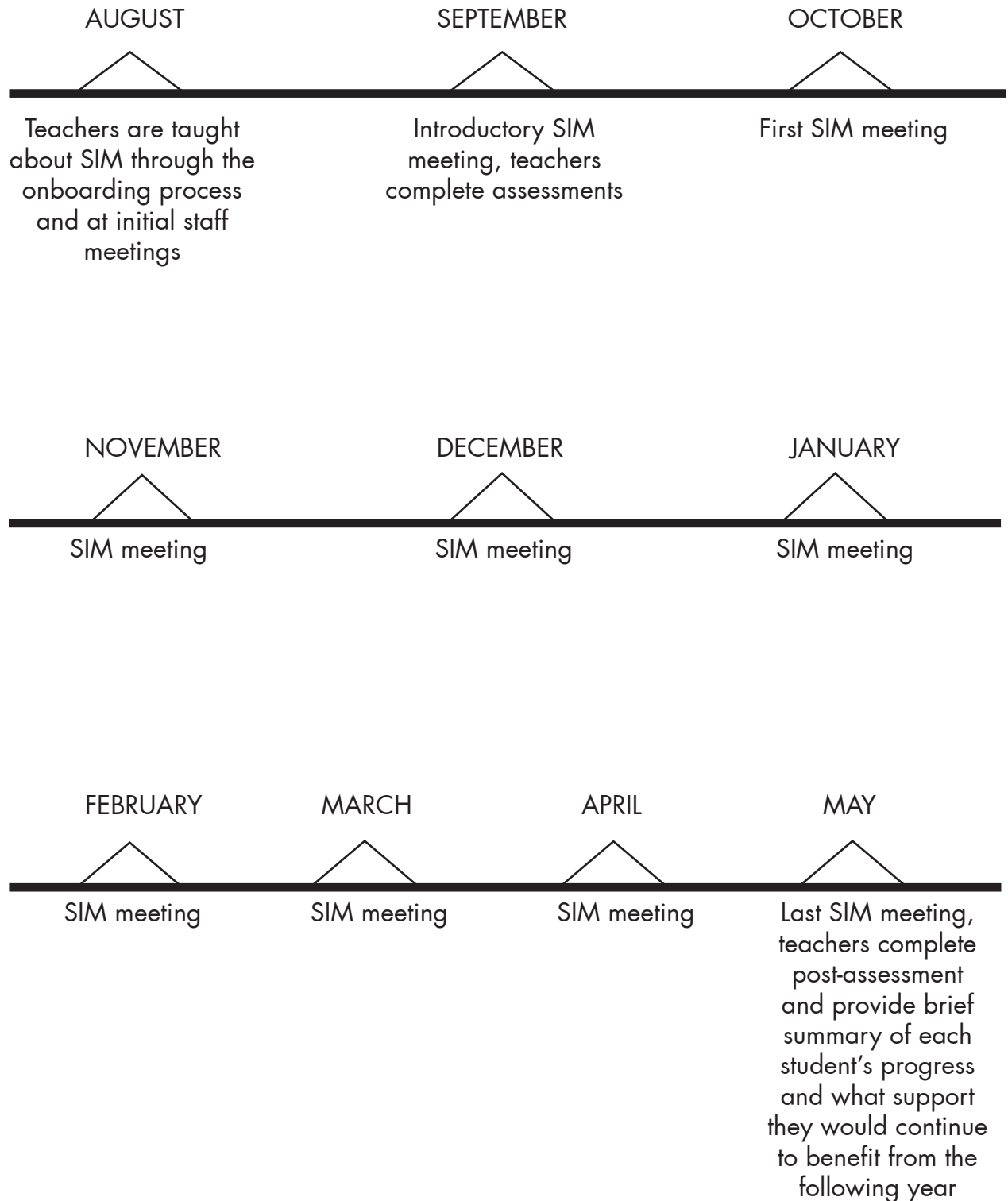
- What barriers may be getting in the way?
- What other factors may be influencing this person’s thinking?
- How can we better support this person in doing this work?

# **PART THREE**

## **HOW TO DO SIM**



# YEARLONG OVERVIEW



## THE INTRODUCTORY MEETING

The first meeting is dedicated exclusively to explaining the process in detail, providing instruction on the assessment tool and answering teachers' questions.



### SAMPLE SCRIPT

"Welcome to the first SIM meeting. Who you see in the room today will be the group who will travel with us on this journey throughout the year."

[Take a moment to go around the table and have each person state their name and role.]

"Typically, we will use these meetings to discuss individual students and come up with plans for targeted interventions to support them, but today we'll be giving more detail to the SIM process. Our goal is that you leave this meeting today with a clear sense of the year. Please ask any questions you have at the end if you're unclear on any part."

As we have mentioned, SIM is a process designed to support you and create targeted interventions for students who have under-developed social and/or academic skills. Of course, we will continue to do the very important work of academic and social emotional development in the classroom that benefits all students. Yet we also know that some students will need additional support in order to be successful."

[Provide teachers with flow chart on page 9.]

"This chart walks us through the SIM process. You will see that the first step is a survey for each student in the class. This is important because it makes sure that we don't miss students who might slip under the radar. For students who are flagged for additional support, you'll complete a more detailed survey."

[Provide sample surveys.]

**CONTINUED ...**



## SAMPLE SCRIPT, CONTINUED

"Here are the two surveys that you will complete. Again, you'll complete the first survey for every student in the class and the detailed survey for those who are flagged on the first survey.

After you've completed the surveys, we'll have information about how to best support these students. That's where the monthly meetings come up. Each month, this group will get together and discuss data from interventions you've tried so far and provide support to you as you work to help these students.

It is important for you to know that we'll never use these meetings to criticize, evaluate or blame you. In this room, we're all on the same team in support of you and your work with students. We're here to help make sure you have the tools you need to be successful."

[Provide sample interventions.]

"Here are some examples of the types of interventions we might recommend. During the meetings, we'll discuss what you've tried so far, and we'll ask your input on what you think might be the best next step. Using these interventions, you can suggest what you think will work. We may provide feedback or additional context if we have insight that might be helpful. For example, we might suggest that you try a certain intervention with just one student or a small group rather than the whole class, if we think that doing it with the whole class wouldn't be as successful.

Then we'll wrap up the meeting with an opportunity for questions or comments. You'll go back to your class and over the course of the month, you'll try the intervention and track how students respond. In the next month's meeting, you'll report back to us how things went and we'll repeat the process. Between meetings, we'll ask you to track your fidelity with which you implemented the interventions as well as track student progress between meetings.

It's okay if there are times when you're unsure of what to do. It's also okay if you've tried something that hasn't worked. It's more important that you show up at these meetings with transparency and openness to try new things. Feel free to ask questions if you're unclear on what we mean when we say something, or if you don't understand a suggestion we've made. And please be honest and open about your struggles and your concerns. It is through this process that we'll be better able to help students.

Do you have any questions?"

## THE REMAINING MEETINGS

Once these initial meetings are concluded, the remaining meetings of the year follow a routine format.

### QUICK RECAP ON STUDENT

"First let's talk about Michael. If you remember, he was the student who stared at his paper but didn't write anything on it until I walked over to his desk and worked with him privately."

### WHAT WAS TRIED

"I used the 'Asking for Help' intervention. I did it with small groups so that Michael wouldn't feel targeted. I pulled groups of three together during quiet reading time and taught the 'Asking for Help' intervention."

### WHAT WORKED, WHAT DIDN'T WORK, AND HOW YOU KNOW

"I thought the lesson went well, and Michael seemed to hear me and understand. But the next day, I handed out a worksheet and as I was walking around the room, I noticed that he was staring at the wall and he hadn't even written his name yet. On the plus side, other students in the class who don't typically ask for help had started to raise their hand and call me over when they had a question."

### OPEN FOR FEEDBACK

Others in the room will ask questions such as, "Does Michael do this with all subject areas, or only certain ones?" "Do you notice this behavior more at certain times of day, or certain days of the week?" "Does Michael complete his work at home?"

### DISCUSSION

The group will discuss details of the student and consider different ideas.

"It sounds like he struggles most when it looks like other students easily understand the work but he doesn't."

"It seems as though he gets more overwhelmed when there are a lot of questions in front of him, and can focus better when he's only given one single task to complete."

### ACTION PLAN

The teacher will come up with the next intervention.

"I think maybe the lack of work isn't about his inability to ask for help, but maybe is because he feels overwhelmed. I'm going to try asking him just to complete a small section of the work, such as the first question while others work on the whole sheet."  
"I am going to teach the "Paying Attention to our Work" intervention to the whole class."

Repeat with additional students as needed.

## THE FINAL MEETING

During the final meeting, teachers complete the same assessment again for each student. This provides an opportunity to see student progress throughout the year.

View a sample meeting at [www.bit.ly/simsample](http://www.bit.ly/simsample).



## SAMPLE MEETING

Participants in this sample meeting include the following (fictional) characters:

KINDERGARTEN TEACHERS:

**Mrs. Jones and Mr. Sosa**

PRINCIPAL:

**Ms. Torrado**

ASSISTANT PRINCIPAL:

**Ms. Green**

MENTAL HEALTH PROFESSIONAL:

**Ms. Jackson**

INSTRUCTIONAL COACH:

**Dr. Anderson**

FAMILY LIAISON:

**Ms. Lopez**

NOTE TAKER:

**Ms. Arroyo**

*Mrs. Jones and Mr. Sosa enter the meeting room. Others are already seated as they've been meeting with grade-level teachers back-to-back all morning.*

**Ms. Torrado:** Welcome.

**Mrs. Jones and Mr. Sosa:** Hi.

**Ms. Torrado:** How's your morning going so far?

**Mrs. Jones:** Busy, but we're here.

**Ms. Torrado:** Great, thank you for being here. Who would like to speak first?

**Mrs. Jones:** *(To Mr. Sosa)* You go ahead.

**Mr. Sosa:** Okay, great. We can talk about Jazmin first.

**Ms. Torrado:** Sorry to interrupt. How many students do you have to discuss today? We want to make sure we pace ourselves so we get to everyone.

**Mr. Sosa:** Three. And Mrs. Jones has two.

**Ms. Torrado:** Great. I'll set the timer for four minutes so we can be sure to get to each student. Go ahead. Jazmin?

**Mr. Sosa:** Yes, so Jazmin. If you remember, last month I told you that Jazmin has been having a hard time staying in her seat. She stands up during circle time and she's constantly moving when the class is sitting in their seats.

**Ms. Jackson:** I remember. And can you remind us which intervention you chose?

**Mr. Sosa:** We worked on a lesson around "listening to others". I was trying to connect the need to listen to instructions so that she would remain in her seat and follow what everyone else was doing.

**Ms. Jackson:** How did it go?

**Mr. Sosa:** I don't think she connected it. I was hoping that she would understand the connection but I think it was too much of a reach for her. The other issue is that I think she actually does listen to my instructions pretty well most of the time. I think this is more of a sensory issue than a defiance issue, but I'm just really not sure. I don't have a lot of experience with sensory issues.

**Ms. Jackson:** You mentioned sensory issues last time too. You said that you were going to add sensory items like squishy balls that she could squeeze to help her remain seated. Did you try that?

**Mr. Sosa:** Yes, but that didn't go over well. The balls were thrown across the room and quickly became a distraction.

**Ms. Green:** Have you given any thought to allowing her to sit outside of the circle?

**Mr. Sosa:** I tried that as well. It doesn't usually work because then she starts distracting the other students as well. I'm also convinced that she needs something more than fine motor skills like I was trying with the squishy balls. I think she needs something that gives her an opportunity to express gross motor movement.

**Ms. Jackson:** What makes you say that?

**Mr. Sosa:** I noticed that she's starting to hit her face a lot.

**Ms. Jackson:** What do you mean by hit her face?

**Mr. Sosa:** She actually just hits her palm against her face while she's in the circle. Sort of like tapping but a little harder.

**Ms. Green:** Do you notice that all day or just in the mornings? I wonder if it could be related to being tired?

**Mr. Sosa:** Good question. I am not sure but I'll start paying attention to that.

**Dr. Anderson:** How is her academic work going? I know Jazmin has always been a strong student. Have you noticed any changes academically?

**Mr. Sosa:** I haven't. She still does really well on individual work.

**Ms. Jackson:** I think your idea of gross motor movement is a good one. I have some ideas of gross motor movements you might try in the classroom. You could have her do wall push-ups, which is just a push-up but standing up and pressing against the wall. You can help her connect it to her behavior, so for example, you might say, "It looks like your body needs to do some movement. I wonder if you'd like to do some wall push-ups for one minute."

**Mrs. Jones:** I wonder if she would think that's a punishment, though?

**Ms. Jackson:** Good point. It's important that she doesn't think she's being punished for needing to move. I've seen some teachers place handprints or stickers on the wall where the student's hands go, so it's just a designated space in the classroom for wall push-ups. That way any student can use it and it's not a punishment. Do you think something like that might work?

**Mr. Sosa:** I am willing to try it.

**Ms. Torrado:** I'm curious about this new development of hitting her face in class. I'm wondering if there's more to the story about her sensory needs. I'd be interested in seeing you track that over the next month and let us know if you notice any trends, like certain times of day, or an increase in general over the next month.

**Mr. Sosa:** I can definitely start paying attention to that.

**Ms. Torrado:** Then I'd also consider making a little menu of different sensory options that she can choose from any time she needs one. So maybe wall push-ups, jumping jacks, joint compression, maybe even getting items like a weighted lap pad.

**Ms. Lopez:** I want to add something here. I've heard from Jazmin's mom that they've recently moved back in with her grandma. It sounds like her dad is still looking for work and had to take a contract job out of state because he hasn't been able to find anything stable here. So he left about two weeks ago and he'll be gone for another 6 weeks or so. I'd be curious if some of Jazmin's recent behavior is related to this transition.

**Mr. Sosa:** I had no idea. Her mom hadn't mentioned that to me.



**Ms. Lopez:** I wonder if Jazmin is really seeking connection from you more than usual.

**Mr. Sosa:** Then having her sit outside the circle is really not a good option.

**Ms. Jackson:** Right. Good observation. So I wonder if you could try addressing both of these at the same time, the sensory and the emotional needs. You could say, "I have noticed that in the morning your body needs to move. I have some choices here of things we could try." Then you could provide the menu of options and do the activity with her. Maybe you have two sets of hand prints on the wall so you can do wall push-ups together. You could also try spending just an extra two minutes a day connecting with her. Just touch base every day, ask her about some of her interests, nothing about school and nothing about her behavior. Maybe taking a walk or something that combines movement if you can find a way to do that.

**Mr. Sosa:** I'm thinking about how I could fit that in. But I'm sure I can do something like that.

**Ms. Torrado:** What would you like to try next? What do you think would be most helpful?

**Mr. Sosa:** I don't know, this is all a lot. I think I can definitely start paying more attention to the sensory issues. And I can add a spot for wall push-ups. I'm thinking the next lesson I might try is about controlling our bodies. I think if I introduce that to the whole class, the wall push-ups and other things might not seem as random.

**Ms. Jackson:** That sounds good. I think the whole class lesson is important, but I would also do targeted work directly with Jazmin.

**Mr. Sosa:** What would that look like?

**Ms. Jackson:** I would give her several opportunities to practice and find times to model it for her. That one-on-one connection time is a great way to layer that in.

**Mr. Sosa:** Okay, sounds good. I'll let you all know what happens.

**Ms. Lopez:** I'm making a note to check on this again next month. If it does seem like it's increasing, we can talk to her mom about checking with the pediatrician on anything related to sensory processing issues.

**Mr. Sosa:** Sounds good.

**Ms. Torrado:** Great, what other students did you want to cover?

**Mr. Sosa:** The next student is Isaac...

## FREQUENTLY ASKED QUESTIONS

### WHAT IF I DON'T HAVE ALL THOSE ROLES ON MY STAFF?

The goal of SIM is to get multiple perspectives in the room. The lack of some of these roles should not provide a barrier to the SIM process. The most important thing is that multiple perspectives are present and that the meetings are consistent and that the same people show up every time.

### WHAT IF A STUDENT HAS AN IEP?

By law, a SIM meeting cannot replace an IEP meeting. However, the tracking of information in the SIM process can prove to be helpful to inform the IEP. It may be helpful to discuss a student's IEP in a SIM meeting to ensure that goals are congruent between the two meetings so that students can get the best, consistent support.

### WHAT HAPPENS TO TIER 3 STUDENTS?

While Tier 3 students may not receive sufficient support through a monthly SIM meeting, the process can serve as a fast track to appropriate evaluation and/or services. SIM documentation can also be useful in supporting a student in an IEP referral process.

### WILL SIM PLAY A ROLE IN THE TEACHER EVALUATION PROCESS?

SIM is not designed to be evaluative in nature. Any vulnerabilities or challenges shared in SIM should be viewed as a strength of that teacher, not as a deficit. Therefore, it is not appropriate that a teacher's evaluation is reflective of the work they do in SIM.

### HOW IS SIM COMMUNICATED TO PARENTS?

It is important to reiterate that SIM is a process designed to support teachers in their work with students. Therefore, much like other interventions done in the classroom, such as targeted math curriculum, parent consent is not required to engage in a SIM conversation. What a teacher is learning through the SIM process about how to best support students can be shared in parent-teacher conferences. Teachers can share behavior they have seen, what they've tried, and what they're continuing to see.

Teachers should also communicate with parents according to school protocol for anything requiring parental consent such as evaluations or testing.

# **PART FOUR RESOURCES**

## PRE-MEETING TEMPLATE

This form may be used to prepare for SIM meetings by capturing relevant information about each student in one place. Completion of this document helps SIM meetings run smoothly and efficiently.

Teacher Name: \_\_\_\_\_ Date: \_\_\_\_\_

Student Name: \_\_\_\_\_

Skill Targeted:

\_\_\_\_\_

Intervention Given:

\_\_\_\_\_

Observations:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Reflections:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Questions for Meeting:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## MEETING NOTES

This form is given to each person in the room, one per student. Anyone who has an action step leaving the meeting completes one.

Teacher Name: \_\_\_\_\_ Date: \_\_\_\_\_

Student Name: \_\_\_\_\_

Notes/Suggestions Provided:

---

---

---

---

---

---

---

---

---

---

My Action Steps:

---

---

---

---

---

---

---

---

---

---

# NOTE-TAKER TEMPLATE

Meeting Date: \_\_\_\_\_ Grade: \_\_\_\_\_

Teacher Name: \_\_\_\_\_ Student Name: \_\_\_\_\_

Student's Strengths:

---

---

---

Student's Challenges:

---

---

---

Interventions Tried:

---

---

Intervention Summary:

---

---

Additional Interventions:

---

---

Progress (Frequency, Duration, Mode):

---

---

Referral for Testing/ Therapy:

---

---

# RECOMMENDATION FORM

Meeting Date: \_\_\_\_\_ Grade: \_\_\_\_\_

Teacher Name: \_\_\_\_\_ Student Name: \_\_\_\_\_

Parents Present: \_\_\_\_\_

School Representatives Present: \_\_\_\_\_

\_\_\_\_\_

School Recommendation:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Basis for Recommendation:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Parent(s) [    ] Accept    or [    ] Deny recommendation

Parent Comments:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Parent Signature:

\_\_\_\_\_ Date: \_\_\_\_\_

School Representative Signature:

\_\_\_\_\_ Date: \_\_\_\_\_

## SAMPLE SET OF NOTES

Meeting Date: November 8 Grade: Second

Teacher Name: Ms. Smith Student Name: Jaxon

### Student's Strengths:

Academically, Jaxon is among the top in his class. His reading level is above average and he is already doing third grade level math.

### Student's Challenges:

Jaxon struggles to control his impulses and sit still in class.

### Interventions Tried:

None yet

### Intervention Summary:

N/A

### Additional Interventions:

N/A

### Interventions to Try:

Whole class will introduce impulse control lesson through a modified version of Red Light, Green Light.

### Progress (Frequency, Duration, Mode):

Jaxon gets up from his seat between 1-3 times per day.

### Referral for Testing/ Therapy:

No



Meeting Date: December 10 Grade: Second

Teacher Name: Ms. Smith Student Name: Jaxon

### Student's Strengths:

Jaxon is still doing well academically and is also a good peer in class, often helping others with academic tasks. Ms. Smith says Jaxon is a very sweet student with a kind heart.

### Student's Challenges:

Jaxon is having difficulty with fine motor skills. He also doesn't seem to have self-awareness around his own challenges. When his teacher calls attention to it, he doesn't appear to have noticed an issue.

### Interventions Tried:

Tried whole class impulse control "Red Light, Green Light" lesson.

### Intervention Summary:

Jaxon was able to follow directions moderately well, but not as well as some of the other students. He did seem to enjoy the activity.

### Additional Interventions:

Checked in with P.E. teacher to see how he was doing. P.E. teacher reported that he has a lot of energy but generally follows directions well.

### Interventions to Try:

Ms. Smith would like to continue to focus on impulse control through more lessons similar to the Red Light, Green Light lesson. She worries that the class is not ready to move on to the next lesson because Jaxon and a few other students still continue to struggle with impulses.

### Progress (Frequency, Duration, Mode):

Jaxon still gets up from his seat between 1-3 times per day.

### Referral for Testing/ Therapy:

No, but will discuss next month

Meeting Date: January 9 Grade: Second  
Teacher Name: Ms. Smith Student Name: Jaxon

### Student's Strengths:

Jaxon is doing much better following directions and seems more aware of his own behavior. He continues to do well academically and is still very sweet to his peers.

### Student's Challenges:

Jaxon is struggling with both fine and gross motor skills. He trips frequently as he moves through the classroom, and he drops objects often. He has a very hard time cutting with scissors. He also grips his pencil very tight, and this affects his ability to work for longer periods of time.

### Interventions Tried:

The class tried an activity called "Pass the Cup" to work on motor skills and impulse control.

### Intervention Summary:

Jaxon was the only student in the class who spilled the water in the cup.

### Additional Interventions:

Have been working with the P.E. teacher to grow gross motor skills.

### Interventions to Try:

Will connect with parents to see about getting evaluated for physical therapy. Will try providing pencil grips and easier scissors. The next intervention lesson will be around self-regulation. Ms. Smith will have Jaxon practice mindful breathing twice per day.

### Progress (Frequency, Duration, Mode):

Jaxon has motor skill "accidents" at least 1-2 times per day.

### Referral for Testing/ Therapy:

Yes, physical therapy

Meeting Date: February 9 Grade: Second  
Teacher Name: Ms. Smith Student Name: Jaxon

### Student's Strengths:

Jaxon has seen progress in his motor movement. He has improved in his gross motor movement skills and has not been crashing into other students as frequently.

### Student's Challenges:

Jaxon is struggling with persistence in his work. He is starting to give up more easily and getting frustrated. He works better alone than in groups.

### Interventions Tried:

Ms. Smith led Jaxon in deep breathing two times a day.

### Intervention Summary:

Jaxon had a hard time initially but was getting better after about two weeks of breathing.

### Additional Interventions:

Jaxon has started seeing an Occupational Therapist outside of school. Ms. Smith tried pencil grips but they were distracting.

### Interventions to Try:

Ms. Smith is going to have her class work on making spaghetti towers using marshmallows and dry spaghetti to practice persistence.

### Progress (Frequency, Duration, Mode):

Jaxon is often the last student to complete his work, which has not been the case all year. This is a new development.

### Referral for Testing/ Therapy:

No, occupational therapy ongoing

Meeting Date: March 13 Grade: Second

Teacher Name: Ms. Smith Student Name: Jaxon

### Student's Strengths:

Jaxon does very well academically when he is working on his own. His work is still high quality. He is sweet and really enjoys special time with Ms. Smith, often sitting with her on the bench at recess.

### Student's Challenges:

Jaxon is the last student to turn in his work. He still gets up and walks around often, distracting others and affecting his ability to complete his work. He doesn't do well in group settings because he is a distraction to the other students.

### Interventions Tried:

Spaghetti and marshmallow tower

### Intervention Summary:

Jaxon was frequently distracted during the group challenge and asked repeatedly if he could eat the marshmallows. His group was able to finish the challenge but it didn't appear that Jaxon contributed much at all.

### Additional Interventions:

Ms. Smith created special hand gestures just for Jaxon which can help him get back on track when he is off-task. The hand gestures refer to different steps of the lesson so he knows what to do when he gets distracted.

### Interventions to Try:

Ms. Smith will try a game of "group juggle" to help Jaxon connect better with peers.

### Progress (Frequency, Duration, Mode):

Jaxon's distractibility appears to be increasing.

### Referral for Testing/ Therapy:

Ongoing Occupational Therapy. Consideration for testing for ADHD. Will track on this idea and check in next month to determine whether or not to approach parents and request testing.

Meeting Date: April 10 Grade: Second  
Teacher Name: Ms. Smith Student Name: Jaxon

### Student's Strengths:

The hand gestures have helped tremendously and Jaxon, while still getting off task easily, is much more able to return to focus when needed. Jaxon is spending about three days a week sitting with Ms. Smith at recess and the other two days a week playing with peers on the playground, which is progress.

### Student's Challenges:

Jaxon is still getting distracted and still struggles with group projects. Jaxon recently threw a pencil at another student in his group who laughed at Jaxon's suggestion for a group project. Until this point, Jaxon has never demonstrated dangerous or violent behavior, and though he's struggled to connect with peers, he's never had a peer conflict.

### Interventions Tried:

Group juggle

### Intervention Summary:

Jaxon enjoyed participating with his peers and the other classmates seemed to genuinely enjoy Jaxon's sense of humor.

### Additional Interventions:

N/A

### Interventions to Try:

Consider testing for ADHD. Ms. Smith would like to do the "helium stick" activity where students all place their fingers on a stick and have to be patient and work together to make it move.

### Progress (Frequency, Duration, Mode):

Jaxon's distractibility appears to be staying the same.

### Referral for Testing/ Therapy:

Maybe. Will approach parents and ask if they'd like to do testing for ADHD.

Meeting Date: May 8 Grade: Second

Teacher Name: Ms. Smith Student Name: Jaxon

### Student's Strengths:

Jaxon is finishing the year on the high end academically. He has also formed a close friendship with another student in the class and they have met up outside of school two times. He still sits with Ms. Smith 1-2 days a week at recess but typically not for the full time.

### Student's Challenges:

Jaxon continues to struggle with impulse control relative to his peers. He also loses stamina on his academic work and has a hard time with group work. He is distracting to his peers during group projects.

### Interventions Tried:

Helium stick

### Intervention Summary:

Jaxon enjoyed the activity but had a hard time following the rule to not pinch the stick. He was having fun but his laughing and silliness was distracting to the students who were trying to focus. The group was successful in lifting the stick together.

### Additional Interventions:

Jaxon was tested for ADHD and the results were on the low range. His parents do not wish to medicate him given the results.

### Interventions to Try:

Ms. Smith plans to finish the year by focusing on deep breathing and helping Jaxon identify ways that he can practice deep breathing at home over the summer.

### Progress (Frequency, Duration, Mode):

N/A

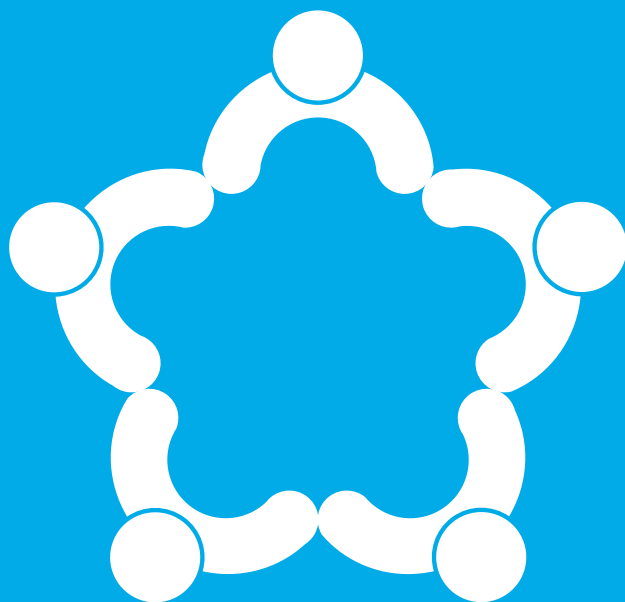
### Referral for Testing/ Therapy:

No

## CONCLUSION

Success comes in all forms and fashions. Sometimes success in the SIM process comes from a student exhibiting new behavior or adjusting his or her coping skills. Other times, success comes from a teacher learning a new skill. Success also comes in the process of cultivating a school culture that is more collaborative in nature. Not all success comes tied up with a bow, but patience and self-reflection can help the process of SIM become integrated into the school culture and ultimately improve outcomes for students, teachers and culture as a whole.

For more information about  
Momentous Institute, including  
additional resources on  
social emotional health, visit  
[momentousinstitute.org](https://momentousinstitute.org).



**momentous**  
**institute®**

Powered by Salesmanship Club since 1920