

Handout 1

Case Study for Stages of Team Development: Bellevue Middle School

You are the assistant principal at Bellevue Middle School, a large middle school serving a population of 550 students in grades 5 – 8. Bellevue is located in a large suburb and is home to students of diverse racial, ethnic and socioeconomic backgrounds. Currently, about 20% of the students are labeled disabled and are served through special education or 504 services. This is your first year at the school, and you have been charged by your principal and School Board with establishing a building-based student referral team commonly known as the SRT. As described to you, the purpose of the SRT is to receive and process referrals for students who are struggling to achieve in school in academic as well as social and behavioral areas. The establishment of the SRT reflects a district-wide initiative to provide appropriate supports to students in general education while being careful not to make referrals to special education unless they seem truly warranted. It is the opinion of the district superintendent that teachers in Bellevue, its “sister” middle school across town, and the high school that serves both schools are turning too quickly to the special education referral process as a way of “solving” the problem that growing numbers of students are not achieving local standards. There is a particular concern that boys who are African-American or Latino are being referred for special education in larger than appropriate numbers, especially in the category of emotional disabilities. A second concern is that many students appear to be arriving to the middle school without the academic skills necessary to adapt to a more content-based curriculum than they encountered in elementary school. Faced with the prospect of declining test scores on annually administered standardized tests and a rising special education population, especially among boys, the School Board, Superintendent and building principal see the SRT as a key element in improving student outcomes at Bellevue.

You have some ambivalent feelings about the challenge you have been given. On the one hand, you believe in the potential of teams like the proposed SRT to raise teachers’ awareness about what can be done in general education classrooms to meet the needs of students with diverse abilities and backgrounds. You see the possibility for the SRT to identify ways for students to be served through a wider network of relatively inexpensive short-term supports (e.g., locally funded reading programs, after school homework clubs, family support groups established through the guidance department, substance abuse counseling, community service options, etc.) and believe that these might in fact reduce an over-reliance on the costly system of special education. At the same time, you have a suspicion that your administration has very high expectations for this team that may outweigh its current capacity to change the system as rapidly and deeply as they would like.

You also have serious concerns about the ability of SRT members to function as a collaborative team. Your middle school is organized into four grade level teams of five content area teachers each (English, Math, Science, Social Studies, and Foreign Language or Health). Two special educators serve student with mild disabilities on two teams each, and two additional special educators serve students across the teams who have more significant cognitive and behavioral needs. Each grade level team is responsible for sending one representative to the weekly SRT meeting, while the two

special educators serving students with milder disabilities alternate attendance at meetings. The 5th grade guidance counselor is also a standing team member, as is the school nurse. Classroom teachers who are referring students to the SRT are supposed to attend the meeting where their student will be discussed, but not all do. Your standing team members are thus as follows:

Grade 5: George Johnson, English

Grade 6: Marcos Lopez, Math

Grade 7: Nancy Sartolli, Social Studies

Grade 8: Brenda Rogers, Science

Grade 5/6 Special Educator: Cindy Martinez

Grade 7/8 Special Educator: Cathy Davies

Grade 5/6 Guidance Counselor: James Henderson

School Nurse and part-time Health teacher: Christine Barrows

And you, the Assistant Principal

It's November and as you look back over the first few months of school, you are taking stock of the difficult situation in which you find your team. On the one hand, you believe that your team has accomplished a lot in short period of time. Under your direction, the SRT has identified a clear set of referral procedures and forms that have been sent to all classroom teachers in the building. Your principal has identified a weekly meeting time and location during the common lunch period shared by these teachers, which runs from 11:35 to 12:15. You have decided upon a regular meeting procedure in which the team deals with general business for 10 minutes (e.g., working on new forms and procedures, discussing related general school issues, etc.), reviews new referrals for 20 minutes, and spends the last 10 minutes monitoring plans developed previously. The team has looked to you to provide all facilitation during the meetings held thus far, as they perceive that this is your charge and that you are the expert in this process. Minutes are taken during team meetings. While the job of recording minutes is meant to be a rotating role, the two special educators have been the only ones to do this job so far, in part because they know students across the various grade levels. The job of sending out minutes and keeping track of the referrals that are coming in as well as plans to be monitored has also become a one person job: yours.

Things worked pretty well in September. You had no student referrals for your first few meetings, allowing the SRT some time to develop the forms and procedures with which you are working. While not all team members were equally enthusiastic about the SRT, most felt at least a general level of acceptance for the team's existence and agreed in principle that it would be one possible way to develop plans to help students and to improve test scores. There was a general sense of cooperation among team members and some level of gratitude for the fact that due to the way in which the team was structured, participating members would be relieved of another school responsibility such as bus or lunch duty. By the first of October, however, you began to sense some cracks in the team's early sense of compliance. George and Brenda have entered into some serious conversations with other team members during and outside of team meetings about their discomfort with the idea that the plans developed by the SRT seem to place "too much responsibility on classroom teachers" and not enough on special educators. "I'm not sure that this is what I was really trained to do," George has been

heard to say. "I'm really feeling like we're just telling classroom teachers to do the special educators' jobs. What are we paying these special educators for, anyway?" Marcos has countered that "the job of a classroom teacher is to get better at meeting all students' needs, not to look to special ed to fix everything," while Christine has made repeated complaints about the administrations' lack of interest in providing any real alternatives to special education. "I'm not saying we shouldn't find ways to support these kids," she notes, "but I really don't see how we can do this without more resources." The special educators differ in their personal views of the purpose of the SRT, which is a challenge, given that they alternate coming to team meetings and have been accused by others as sending mixed messages. Cindy is perceived by others to be very patient, compassionate and student-centered. She's offered to take on many parts of the plans being developed for students at risk (e.g., she offers to do initial classroom observations and diagnostic screenings that will help the team gather additional data on the students), but to date, she hasn't been able to keep up with all of her promises. Cathy, on the other hand, has expressed some sense of frustration at the extra duties and time that the SRT seems to have brought her, in spite of the fact that when others have offered to record the minutes she declines.

You are feeling overwhelmed too. Your early sense of uncertainty about the SRT's capacity to meet all of the goals set by your supervisors has been weighing on you as discontent has set in among team members. You're finding yourself overloaded with the paper work trail that your team first identified as important, and wonder how the team can ever fulfill its monitoring responsibilities. Referrals have increased significantly since the beginning of the school year and already, the team is way behind its goal to process referrals within a week of their arrival. As has been the case in the past for special education referrals, a disproportionate number of referrals are for boys from diverse racial and ethnic backgrounds. James Henderson has brought this to the team's attention, expressing his belief that classroom teachers "are intolerant of kids who learn and behave somewhat differently." November has not brought much relief. George has twice sent another teacher to fill his place, saying that as a grade level team leader, his "plate is full and I'm not really sure I want to continue with this team." Christine has been arriving late to each meeting, though she always has a "good excuse" in terms of having just come from helping a child who's not feeling well. Outside of the SRT, classroom teachers are grumbling about the fact that referrals are moving slowly. At least one has complained to you that "the SRT just seems to be another hoop to jump through before getting a kid into special education." But the worst part for you is that there seems to be an increasing level of conflict among team members. A discussion about the degree to which students should be supported or held more accountable for their own performance became really tense last week, with Brenda commenting that "I just don't know how we can help all these poor kids and kids with learning issues who keep moving into our school. The problem is that their families just don't care for them. This team is not going to fix their problems. Special Education is a much better place for them, although I'm still concerned that in the end, we get blamed for their poor performance on standardized tests." Marcos left the room.

Questions for Discussion

1. What is your initial reaction to this team? What are its basic strengths and challenges related to collaborative processes and the five essential elements of collaboration (i.e., face to face interaction, positive interdependence, interpersonal skills, individual accountability, and group processing)?

2. What are some specific ways in which the challenges you have noted are manifested in team processes and/or team members' behaviors?

3. Based on the strengths and challenges you have identified, how would you characterize this team's stage of group development?

4. What advice would you give to the assistant principal who has been given the task of establishing this team? What are some specific actions she and other team members can take to support the team in moving to a higher level of team development?

5. What additional external supports might need to be employed to help the team grow in a positive direction?

6. What are the implications of this team's difficulties in collaboration for students, especially those placed at-risk and those with disabilities? Conversely, what are the benefits for students of a more highly functioning team?