

**Alberta Education's Program Unit Funding (PUF) and Human Services'  
Family Support for Children with Disabilities (FSCD) Specialized Services  
Common Approach: Edmonton Public Schools Pilot Project in  
Waverley School and Hillview School**

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# Executive Summary

## Introduction

Preschool children with severe disabilities/delays can receive several services funded by the Government of Alberta, including Alberta Education’s Program Unit Funding (PUF) and Human Services’ Family Support for Children with Disabilities (FSCD) Specialized Services. The Government of Alberta created the PUF/FSCD Common Approach to bring together these two programs through a “single service team implementing one plan across settings” (GoA, 2014, para.2). In October 2016, Edmonton Public Schools (EPS) introduced a pilot to deliver the PUF/FSCD Common Approach with one plan and one team in two sites – Waverley School and Hillview School. The purpose of this research project is to study the pilot project and develop a model that may be adapted to other early years locations.

## Methodology and Methods

A literature review and mixed methods approach with qualitative and quantitative data was used for the research project. The research was conducted with EPS (or District) staff who were involved in the pilot project and FSCD provincial employees. A focus group was used to develop a logic model for the initiative, and interviews were held to look at the process to deliver the PUF/FSCD Common Approach in Waverley School and Hillview School. A preliminary assessment of the pilot project was conducted through the focus group, interviews, and survey.

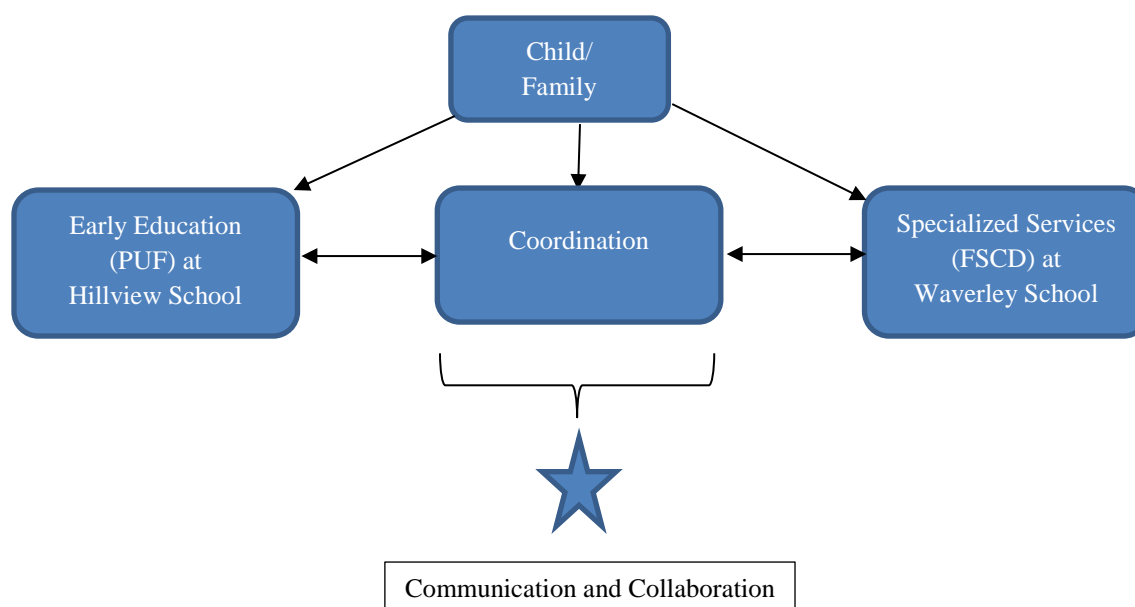
## Key Findings

The PUF/FSCD Common Approach pilot project for Waverley School and Hillview School brought together the Early Education (PUF) program from Hillview School and the Specialized Services (FSCD) program from Waverley School to deliver a common approach through one plan, one team, and two sites. The pilot project reflected several best practices in early childhood interventions for children with disabilities and their families.

District staff who participated in the research project indicated the pilot project created efficiencies and benefits for the family through a “one-stop shop” for families. However, the initiative has added complexity for teams, requiring more time and work. The challenges faced by the team are typical of multidisciplinary teams, and the solutions proposed by the team (e.g. clear roles, responsibilities, and processes) are aligned what a literature review indicates needs to be in place for a well-functioning team.

Most importantly, coordination - through communication and collaboration - will be the “glue” that holds the initiative together, as demonstrated in *Figure 1: Overview of PUF/FSCD Common Approach Pilot Project: Process*. As well, aligned system processes could create efficiencies, as well as the way the teams and schools are structured and organized.

**FIGURE 1: OVERVIEW OF PUF/FSCD COMMON APPROACH PILOT PROJECT: PROCESS**



## **Options to Consider and Recommendations**

The four options considered for this research project are:

- Option 1: Status Quo: Continue with the pilot project, while introducing incremental improvements to the PUF/FSCD Common Approach at Waverley School/Hillview School and evaluate a year from now
- Option 2: Foster One Plan, One Team, One Site Approach to PUF/FSCD Common Approach
- Option 3: Create a Core Team of both Early Education and Specialized Services in One Location to Serve Multiple Locations
- Option 4: Government of Alberta and Edmonton Public Schools to Further Align the Two Programs to Create Further Efficiencies

The recommendation for the pilot project is Option 1: Introduce incremental improvements to the PUF/FSCD Common Approach in Waverley School/Hillview School and evaluate the approach a year from now, which includes suggestions predominately recommended by team members, with Option 3 to be considered in the long-term. The recommended next steps include:

1. Create/communicate well-defined responsibilities, processes, and expectations.
2. Continue to identify opportunities to create alignment between the PUF/FSCD Common Approach pilot project.
3. Develop a culture change management strategy to support gradual transition of staff and schools in the PUF/FSCD Common Approach.
4. Evaluate the impact of the incremental changes in Spring 2017.

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## **List of Abbreviations**

EPS: Edmonton Public Schools

EPSB: Edmonton Public School Board

FOP: Family-Oriented Programing Sessions (FOPs)

FSCD: Family Support for Children with Disabilities

GoA: Government of Alberta

IFSP: Individualized Family Support Plan

IPP: Individualized Program Plan

ISPP: Individualized Service Program Plan

PD: Professional Development

PUF: Program Unit Funding

RBI: Routines Based Interview

SS: Specialized Services

# 1.0 Introduction

## 1.1 Defining the Problem

Early childhood is an important time in every child's life as children are developing the skills for growth and lifelong learning (Bruder, 2010, p.339; EPSB, 2015c, p.22). For children with disabilities, interventions and supports can be provided to compensate for their needs, support families, and better prepare the children for school and the broader world. Professional supports and services for children and their families are often delivered by multidisciplinary teams, as early childhood intervention utilizes many disciplines and fields of study (Bruder, p.340; Canary, 2008, p.417).

In September 2015, the Government of Alberta began a phased implementation of the Program Unit Funding (PUF)/Family Support for Children with Disabilities (FSCD) Common Approach province-wide (GoA, 2014, para.3). The initiative integrates two programs delivered to children with severe disabilities/delays and their families (GoA, 2013b, p.1). In October 2015, Edmonton Public Schools (EPS) or "the District" began to pilot a PUF/FSCD Common Approach with the Waverley School Specialized Services team and Hillview School's Early Education team. The purpose of this research project is to study the pilot project and develop a model that may be adapted to other early years locations.

## 1.2 Project Client and Deliverables

Edmonton Public Schools is a School District in Alberta's capital city – Edmonton. The District has 202 schools (EPS, 2015b, p.6). The District is committed to inclusive education (EPSB, 2012, para.1), and supports children and students' special education needs from preschool to Grade 12 (EPS, 2015b, p.1) through an Inclusive Learning department (EPS, 2014a, p.1).

Within the department is Ms. Natalie Prytuluk, Early Years Supervisor, the client for this project. Ms. Prytuluk oversees a coordinated approach to Early Years programming in the District and is interested in assessing the process and approach to implementing the PUF/FSCD Common Approach pilot project to inform how to replicate the approach in other Edmonton Public School early year's locations.

The deliverables for this research project include:

- logic diagram and structure of the PUF/FSCD Common Approach delivered in Waverley School/Hillview School;
- preliminary assessment of the PUF/FSCD Common Approach;
- proposed model of PUF/FSCD Common Approach for Edmonton Public Schools.

### 1.3 Project Objectives and Research Questions

The purpose of this project is to study the PUF/FSCD Common Approach pilot project in Waverley School and Hillview School and develop a model that may be adapted to other early years locations. The project included a logic model of the initiative. A logic model shows the relationship between the resources used to operate the initiative (inputs); implementation activities; outputs produced from the activities; and, the outcomes, or intended results, of the initiative (McDavid and Hawthorne, 2013, p.52-55). The project also included a model of the process for the initiative and a preliminary assessment of the process to implement the pilot project. Thus, the questions bear on matters of the structure of the PUF/FSCD Common Approach, implementation, project objectives, and future directions. To address these topics, the research project focused on the multidisciplinary team and staff in the school, along with provincial employees.

The **primary research question** is:

- To what extent has the PUF/FSCD Common Approach provided coordinated, collaborative services to families accessing the pilot project at Waverley School/Hillview School?

**Secondary research questions** include:

*Structure/Process*

- What are the key components (structure) of the PUF/FSCD Common Approach?
- What process was used to implement the PUF/FSCD Common Approach?

*Project Objectives*

- To what extent did the pilot project achieve the following intended short-term objectives:  
1) One team, one plan (coordinated services); 2) Team members work together to identify strategies?
- What efficiencies resulted from the pilot project for the multi-disciplinary team?  
Families? School (teachers)?

*Implementation*

- To what extent has communication been clear and effective between the school, family, and multidisciplinary team?
- To what extent has collaboration been effective between the school, family, and multidisciplinary team?
- What are the strengths of the process used to implement the PUF/FSCD Common Approach in Waverley School?
- What are opportunities to improve the process of the PUF/FSCD Common Approach?
- How have multidisciplinary teams evolved through this process?

*Future Directions*

- Based on the findings from the pilot project, what is the proposed PUF/FSCD Common Approach service delivery model?

## **1.4 Background**

### **1.4.1 Government of Alberta**

In September 2010, the Government of Alberta piloted the PUF/FSCD Common Approach pilot in five provincial locations (Alberta Centre for Child, Family, and Community Research, n.d., para.2), and began to implement the PUF/FSCD Common Approach province-wide beginning September 2015 through a phased approach (GoA, 2014, para.3). The PUF/FSCD Common Approach integrates two programs: Program Unit Funding and Family Support for Children with Disabilities – Specialized Services Program, and is intended to create “a single service team implementing one plan across settings” for families accessing both of these programs (GoA, 2014, para.2).

### **1.4.2 Program Unit Funding**

Through Alberta Education’s PUF Program, children professionally diagnosed with a disability or disorder may receive specialized supports and services (GoA, 2015c, p. 1). Children may be assessed and coded as mild/moderate or severe disability(ies) (Ibid, p.2,6). Children with severe disabilities or delays include children with severe cognitive (intellectual), emotional/behavioural, physical or medical disability; severe multiple disabilities; deafness; blindness; or severe delay involving language (Ibid, p. 6-10).

Children and their families who utilize the PUF programs are required to have an Individualized Program Plan (IPP) in a school setting to identify a child’s learning needs and strengths, focus teachers’ instructional efforts, and support communication between teachers, parents, and students (GoA, 2006a, p.i).

### **1.4.3 Family Support for Children with Disabilities – Specialized Services for Children with Severe Disabilities**

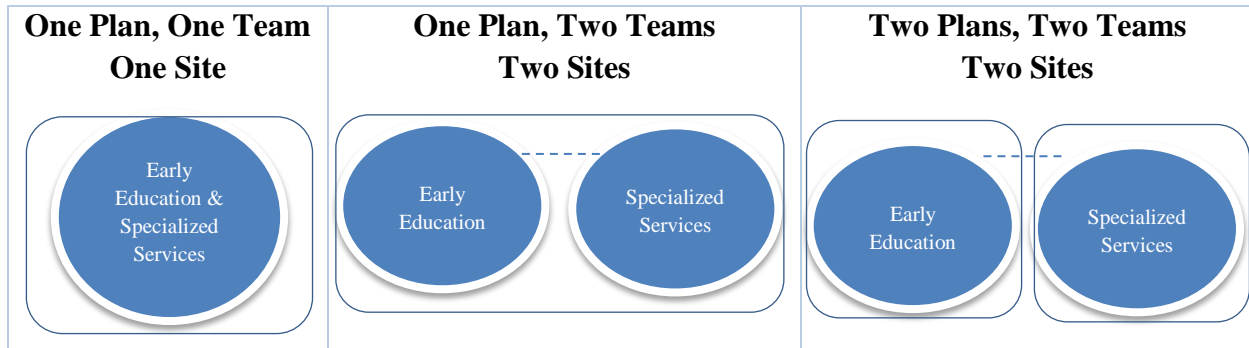
Alberta Human Services’ FSCD Specialized Services Program is for children with severe disabilities who have “significant limitations and service needs in [two] of the following areas: i) behaviour; ii) communication and social skills; iii) cognitive abilities; iv) physical and motor development; v) self-help skills and adaptive functioning” (GoA, 2004, Section 10-77). Specific to the Specialized Services program, “severe disability” addresses the degree the child is limited to function in normal daily living activities, and the extra demands created for their family (GoA, 2012b, para.3). Children who are able to access the FSCD program must be diagnosed by a physician or health care professional, be under the age of 18 and a Canadian citizen or permanent resident living in Alberta (GoA, 2004, Section 5.3).

As part of the FSCD Specialized Services program, families are required to complete an Individualized Family Support Plan (IFSP) to determine goals for their child’s development (GoA, 2012a, para.1-2).

### 1.4.4 PUF/FSCD Common Approach Models in Alberta

Three PUF/FSCD Common Approaches exist in Alberta as depicted in *Figure 2: Different Approaches to Delivering PUF and FSCD Specialized Services*, which varies by the number of plans created, teams that deliver PUF and/or FSCD Specialized Services, and location of teams (Participant, May 19, 2016).

**FIGURE 2: DIFFERENT APPROACHES TO DELIVERING PUF AND FSCD SPECIALIZED SERVICES**

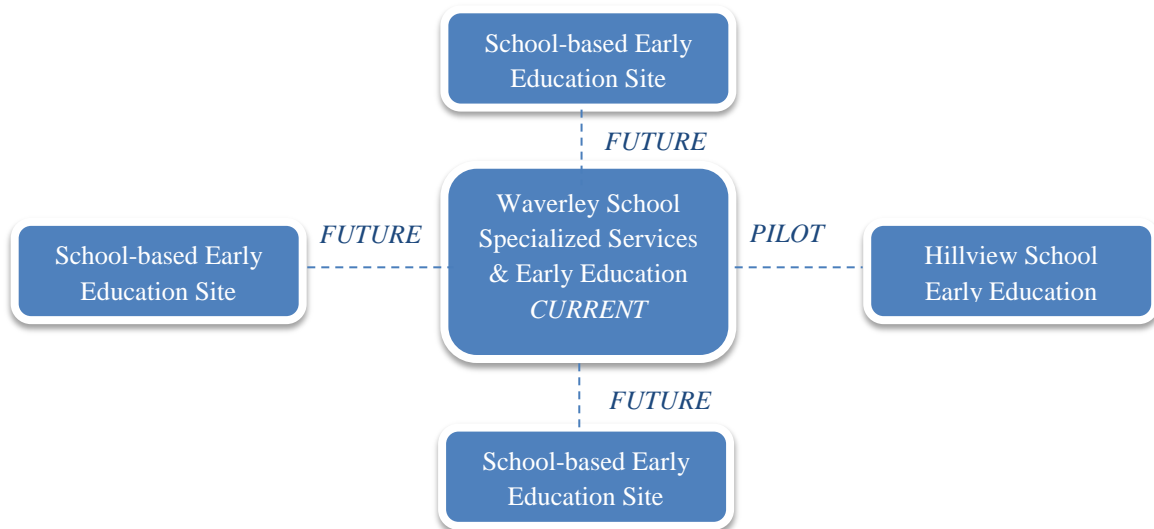


### 1.4.5 Edmonton Public Schools – Early Years Programming

EPS provides several early years programming for children between the ages of two to five (EPSB, n.d.c, para. 1), which supports the District’s goal – an excellent start to learning (EPSB, 2014b, p.2). The programming includes Early Education and Specialized Services programs. The Early Education program helps children build skills and behaviours needed for school before Kindergarten (EPSB, n.d.a, para 1) and is funded by Alberta Education’s PUF program (EPS, n.d.e. para.1). The Specialized Services Program supports families with “children who need intensive support for behaviour, socialization, communication or daily living skills at home and in the community” (EPSB, n.d.d. para. 1) for families approved for Specialized Services contract through Alberta Human Services (EPSB, para.5).

The two schools in the pilot project deliver Early Education programs. Waverley School delivers both Specialized Services and Early Education programs and has delivered a common approach for several years. Hillview School delivers an Early Education program. The pilot project is exploring delivering Specialized Services to multiple early education sites. EPS is exploring evolving the model to create a central hub of Specialized Services to serve children and families in multiple Early Education sites beginning with Waverley School Specialized Services and Hillview Early Education program, demonstrated by *Figure 3: PUF/FSCD Common Approach Multi-Site Delivery Model*.

**FIGURE 3: PUF/FSCD COMMON APPROACH MULTI-SITE DELIVERY MODEL**



### **1.5 Significance of Research Project and Potential Contributions**

Edmonton Public Schools is committed to fostering the growth and success for every student by supporting their journey from early learning through high school completion and beyond, and providing welcoming, high-quality learning, and working environments. The PUF/FSCD Common Approach supports the District’s interests to support early learning and to create welcoming and inclusive environments. This research project will inform how the PUF/FSCD Common Approach may be replicated in other EPS schools, and contributes to research for family-centred multi-disciplinary programs for children with disabilities and their families. The PUF/FSCD Common Approach is unique to Alberta.

### **1.6 Organization of Report**

The remainder of the report is organized into five sections. The first section is a literature review of early childhood development and interventions that focuses on emerging trends related to natural and inclusive environments, family-centred approaches, multidisciplinary teams, coordination, and a process to implement early childhood interventions. The second section provides an overview of the methodology and methods used in this research project (focus group, survey, interviews), data analysis used, and the project limitations and delimitations. The third section presents the findings from the data collection methods, including a logic model for the pilot project, process to implement the pilot project, discussion of the two short-term objectives of the PUF/FSCD Common Approach, and a preliminary assessment of the pilot project. The fourth section is a detailed discussion and analysis of the report findings. The final section of this report presents options and recommendations to consider regarding the PUF/FSCD Common Approach pilot project followed by concluding remarks.

## 2.0 Literature Review

### 2.1 Introduction

This section summarizes a literature review of early childhood development and children with disabilities. The review included a search on the topics: early childhood and children with disabilities; inclusive learning; natural environments; ecological approaches; family centred approaches; and, multidisciplinary teams.

The literature review reveals extensive research on early childhood interventions for children with disabilities, supports for their families, and the role of collaboration, and multidisciplinary teams in providing supports. Emerging themes are the importance of early childhood interventions in natural and inclusive environments; family-centred approaches; and the importance of multidisciplinary teams.

### 2.2 Early Childhood Interventions

Early childhood is an important time in every child's life (Bruder, p. 339) when children are developing the skills for growth and lifelong learning (EPSB, 2015c, p.22). Research demonstrates investing in the early years results in positive long-term education, health, and well-being outcomes for children (Centre on the Developing Child, 2007 as cited in KPMG). In particular, early childhood development is critical for children with disabilities (Bruder, p.339).

The United Nations Convention on the Rights of Persons with Disabilities defines disabilities as individuals who have “have long-term physical, mental, intellectual or sensory impairments which in interaction with many barriers *may hinder their full and effective* participation in society on an equal basis with others” (cited in Government of Canada, 2013, p.16; emphasis mine). For children diagnosed with a disability or delay interventions and strategies can be introduced to “compensate for the child's need” (Guralnick, 2005 as cited in Bruder, p.339). Strategies can help address the gap and enhance a child's individual functioning (Luckasson, 1992 as cited in Kyzar, p.31), and better prepare a child to “arrive at school ready to learn” (Carta and King, 2007 in Bruder, p.339). Bruder indicates when a child is diagnosed with a disability or delay earlier, more time can be dedicated to providing interventions for the child, which increases the benefit of intervention strategies (p.339).

A definition of early childhood intervention is “the provision of educational or therapeutic services to children under the age of eight” (Sigel, 1972 as cited in Bruder, p.339). Dunst has developed more recent definition of early childhood intervention as “experiences and opportunities [given] to infants and toddlers (and preschoolers) with disabilities by the children's parents and other primary caregivers (including services providers)...to promote

the children's acquisition and use of behavioural competencies to shape and influence their prosocial interactions with people and objects" (Dunst, 2007 as cited in Bruder, p.340). The primary purpose of early childhood intervention is to help children develop skills that will "minimize the long-term effects of specific risk factors in development" (Majnemer, 1998, p.62).

Several benefits of early childhood intervention programs include:

- increased family well-being and strong family relationships;
- positive attitude and secure base for learning for the child with a disability;
- acceptance among peers and increased social skills for the child with a disability;
- continuity of experiences for a child with a disability;
- greater service satisfaction, stronger efficacy, and control for parents;
- positive parent perception of their children.

(Canary, p. 417; State of Victoria, 2012, p. 7-8).

As a field, early childhood intervention is complex, and spans many disciplines and fields of study, including health, psychology, early childhood education, and special education (Bruder, p. 340). Early childhood intervention services may include child-focused programs that integrate children with disabilities with other children in a school setting; and/or family focused programs which programs emphasize on parenting skills and relationships (Ibid.).

### **2.3 Natural and Inclusive Environments**

Early childhood interventions are often provided in a variety of natural settings or environments for the child and family, which enables children with disabilities to develop and gain skills in a variety of environments (Bruder, p. 342-342). Examples of natural environments include home, early education programs, or a community setting (Ibid).

Activities are created in these natural environments that integrate instructional and therapeutic techniques (Campbell, 2004 as cited in in Bruder, p.342) to help children with disabilities build on their existing strengths and develop and enhance new capacities (Bruder, p. 343) such as learning a bedtime routine or playing in a classroom setting. The activities are delivered in the "same developmental contexts as" their peers, which enables the child with a disability to develop skills and relationships related to these environments (McCollum, 2002, p.6).

More specifically, inclusive education is becoming more common place where children who have disabilities are taught with peers in a classroom setting while provided supports (as necessary) by a multidisciplinary team of professionals (Hunt et al, 2004, p.124). Thirty years of research demonstrates that young children with disabilities benefit from interactions with children without disabilities (Bruder, p.343).

## 2.4 Family-Centred Approaches

Early childhood interventions are increasingly focused on supporting families of children with disabilities (Davis et al, 2009, p.154; Truesdale-Kennedy, 2006, p.377; Wang, 2009, p.149). Rather than focusing on only the child, this approach recognizes that children are part of a larger family unit and are developing and learning within the context of their families (Bruder, p.341). Because of the key role of the family in a child's life, a desired outcome of early childhood intervention is to help families gain confidence and competence in their child's learning (Bailey et al, 2006 as cited in Bruder p.341-342). Family-centred approaches also recognize that disabilities impact a whole family (Wang, p.149), and explores ways support can be provided to the entire family.

Family-centred approaches emphasize several principles such as mutual respect and trust, open communication and responsive listening, honesty, and reciprocity (The State of Victoria, p. 3). A number of foundational beliefs are found in family-centred approaches: the family is the constant in a child's life, knows the best needs of the child, and is the best helper of the child (Wang, p.149; Dunst, 2002 and Duwa, Weels and Lalinde, 1993 as cited in Demsey, 2008, p.42). Because of the importance of the family, partnerships and collaboration between parents and service providers, and family participation in service delivery decision-making are emphasized (Dempsey, Keen, 2008 as cited in Wang, p.149; Truesdale-Kennedy, 2006, p.377; Dunst, 2002; Duwa, Weels and Lalinde, 1993 as cited in Demsey, 2008, p.42). Family-centred approaches also highlight individualized services for each child with a disability and their family, recognizing the unique situations each family faces (McCollum, p.6).

*Table 1: Relationship Between Parents and Family Service Providers* shows how the way service providers and families have worked together over the past 60 years based on work by Turnbull, Ann P., Vicki Turbiville, H.R. Turnbull. The evolution is from professionals as experts (2000, p.634) to family-focused priorities (p.640) based on family choice and strength (p.638) to collaboration (p.642) and the professional as the facilitator/collaborator (p.644).

**TABLE 1: RELATIONSHIP BETWEEN PARENTS AND FAMILY SERVICE PROVIDERS**

Parent counselling/ psychotherapy	Family involvement	Family-centred services	Collective Empowerment (Emerging)
1950s-1960s	1960s-1970s	1980s	1990s and into 21 <sup>st</sup> century
Professionals have expert knowledge and power (p. 634).	Professionals have expert power to make/prescribe interventions. Parents identified as lacking skills (p.636).	Parents and service providers determine what to include, address, and what resources are to be provided (p.639). Family-centred interventions characterized by family choice and strengths (p.638). Shift to family-focused priorities from child-focused (p.640) with outcomes for both child and family, and family has increased ability to meet their child's needs (Ibid.).	Collaboration and family-professional partnerships. Capacity building of participants without taking power from others (p.642). Both families and professionals benefit from empowerment approach (p.641). Professional facilitator/collaborator/partner rather than expert/specialist (p.644). Synergy, renewable and expandable resources, increased satisfaction by participants (p.645).

Source: 1) Turnbull, Ann P., Vicki Turbiville, H.R. Turnbull. (2000). Chapter 27: Evolution of Family-Professional Partnerships: Collective Empowerment as the Model for the Early Twenty-First Century. From Handbook of Early Childhood Intervention, p.634-645.

## 2.5 Multidisciplinary Team

Given the complex nature of early childhood intervention, professional services are often delivered by teams of professionals from different disciplines and fields of study (Bruder, p.340; Canary, p.417). The team is thus multidisciplinary, and may include mental health workers, teachers, occupational therapists, physical therapists, speech-language pathologists, behavioural consultants, school family liaisons, or health supports (McCullum, p. 7; EPSB, 2014c, p.20). Because team members are working with other professions and fields together, team members may go beyond their traditional role of expertise (McCullum, p.7). Furthermore, team members not only work with other professions and disciplines, they may work with other agencies that range from schools, hospitals, or mental health agencies (Knitzer, 2000 as cited in McCullum, p.7). Because of the different expertise, skill sets, and perspectives held by team members, when team members develop and integrate strategies from different disciplines together to address a child's developmental needs, an integrated team approach creates efficiencies.

While efficiencies and benefits may exist by using a multidisciplinary team approach, research identifies several challenges. Challenges may include the difficulty involved in coordinating multiple service providers; changing roles and responsibilities of team members within a multidisciplinary team and the potential for functions to overlap; lack of

team processes with shared goals and regularly scheduled meetings; the time and resources required by team members to develop working relationships; collecting outcome data to demonstrate progress made through the interventions; and, a *growing gap* between *what is being done* in early childhood interventions and *what should be done* (Bruder, p. 345-346; Hunt, p.124, 141). Other challenges include communication and different cultures and management between professionals and agencies (Atkinson et al, 2002 as cited in Wall, p.190).

There are a number of practices that can support the team to function well, including identifying common goals; ensuring frequent communication between team members, clearly defined roles and responsibilities (Hunt et al, p.141; Bruder, p. 343); and how professionals complement each other (Wall, p. 179). Wall indicates “clarity is needed on who will be responsible for coordinating the support so that each professional and parents are fully aware of what has already taken place, what has been agreed upon, what progress has been made, what...plans are in place, and how provision is monitored” (ibid). In addition to sound processes, strong, collaborative (and continuous) relationships between all members of the team – including parents – is important (Canary, p.419; Bruder, p.343) as is training for professionals in interagency working (Wall, p. 192).

## **2.6 Coordination**

### **2.6.1 Service Coordination**

As early childhood intervention is complex, involving several professionals from different fields, service coordination is important. The service coordinator provides oversight for the development of the plan; coordinates and facilitates of early intervention services; engages families in the decision-making and service provision process; provides information to families about services available, child learning opportunities, child health and child care; and supports transition planning (Dunst and Bruder, 2006, p.156).

While different service coordination models exist, Dunst and Bruder identify the best service coordination involves frequent contact between the service coordinator and the family (Dunst et al., 1993; Roberts, Behl et al., 2005; Trivette, Dunst, Boyd, & Hamby, 1995 as cited in Dunst and Bruder, p.161). The service coordinator may work for the agency delivering the services and provide only service coordination or may provide service coordination and intervention services (Dunst and Bruder, p.161-162). However, the least effective model of service coordination is a service coordinator working as part of an agency separate from service providers (Ibid, p.162).

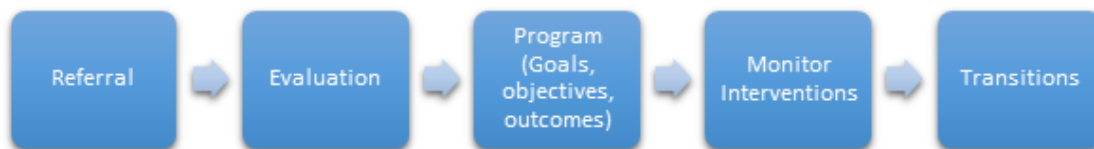
### 2.6.2 Primary Coach/Key-Worker System

Sheldon and Rush indicate that the question of “early childhood intervention...is not if teams should be used, but how teams can be configured to work together effectively” (2010, p.175). They identify a primary coach approach to identify a lead program resource and point of contact for the family and team (Ibid, p. 176). The primary coach mediates the family’s and team’s skills and knowledge related to priorities and resources (Ibid.). The primary coach also receives coaching from other team members and uses coaching with parents and other care providers (Sheldon and Rush, 2007, in Sheldon and Rush). This is similar to the “key worker system” discussed by Wall where one professional/point of contact coordinates and manages services for the child/family, with conferences and meetings involving all members of the team (2011, p.171).

## 2.7 Process to Implement Early Childhood Intervention

Guralnick has identified a process to implement an early childhood demonstrated in *Figure 4: Process to Implement Early Childhood Interventions*, which includes five stages: referral; evaluation; program creation with goals, objectives, or outcomes; monitoring of interventions; and preparing the child and his/her family to transition out of the early intervention into another program.

**FIGURE 4: PROCESS TO IMPLEMENT EARLY CHILDHOOD INTERVENTIONS**



Derived from: Guralnick, 2005 as cited in Bruder, 2010, p.344-345 and McCollum, p.6-7.

The process begins with referral and screening to determine if the child is eligible for evaluation (Guralnick, 2005 as cited in Bruder, 2010, p.344), and continues with evaluation and creation of a program for the child and his/her family (Ibid). This step includes family interviews to identify the family’s needs and concerns for the child (Boone and Crais, 1999 as cited in McCollum, p.6) and the creation of a joint plan and goals developed in collaboration between families and service providers for natural settings (Bruder, 2000 as cited in Bruder 2010, p.344). The plan and goals are then monitored as the interventions are implemented to assess process (Ibid). Finally, the child and family are prepared to transition out of the early childhood intervention model to a new model (Bruder and Chandler, 1996 in Bruder, 2010, p.345), for example, a formal school setting.

## 3.0 Methodology and Methods

### 3.1 Introduction

This section outlines the methodology and methods used for this research project. This includes a description of the three methods used in the research project (focus group, survey, interviews), the data analysis used, and the project limitations and delimitations.

### 3.2 Methodology

The research project began as a formative process evaluation to inform the development of a flexible model for service delivery within Edmonton Public Schools. According to the Canadian Evaluation Society, a process evaluation focuses on the delivery of an initiative, examines the design of an initiative, provides information when starting or expanding a new initiative, and requires a description of the initiative and logic model (2009, p.9). As the pilot project had yet to include a logic model, the research project focused on the creation of the initiative logic model, the first step required in conducting an evaluation, continued with the process to deliver the initiative and a followed by a *preliminary assessment*.

McDavid and Hawthorn provide a basic logic model approach that demonstrates the relationships between inputs (the resources to operate the program), implementation activities, program outputs produced from the program as a result of the activities, and program outcomes, or intended results (2013, p.52-55). Given time constraints facing this research project, the logic model was amended to include only inputs, activities, outputs, and outcomes.

The research began with a literature review and continued with a mixed methods approach which included qualitative information collected through a focus group, survey, and interviews. Quantitative information was collected through a survey.

### 3.3 Methods

Three data collection techniques were used: focus group, survey, and interviews. A follow-up conversation with the focus group to share results was originally within the scope of the project but was moved to after the research project is completed due to the timing of the project near the end of the school year. A summary of the methods used is found in *Table 2: Research Methods for PUF/FSCD Common Approach in Waverley School/Hillview School*.

**TABLE 2: RESEARCH METHODS FOR PUF/FSCD COMMON APPROACH IN WAVERLEY SCHOOL/HILLVIEW SCHOOL**

<b>Method</b>	<b>Focus Group: Logic Model</b>	<b>Survey: Preliminary Process Assessment</b>	<b>Semi-Structured Interviews: Process</b>
<b>Purpose</b>	To identify structure (logic model) to implement PUF/FSCD Common Approach in Waverley School and to reflect on the implementation of the pilot project.	To look at the implementation of the PUF/FSCD Common Approach (communication, collaboration,); the extent the project objectives were achieved, advice moving forward.	To provide details around the impact and process to implement PUF/FSCD Common Approach in Waverley School.
<b>Invited Participants</b>	School administration, multidisciplinary team members (school-based team and specialized services team), provincial employee, additional participants as recommended. Client as observer.	School administration, multidisciplinary team members (school-based team and specialized services team).	Multi-disciplinary team, provincial staff.
<b>Targeted Sample</b>	8	13	3
<b>Actual participants</b>	8	11	5 participants; 4 interviews
<b>Time:</b>	One workshop (3 hours)	15-30 minutes	One meeting per participant (1 to 1.5 hours each)

*Note: All school administration and multidisciplinary team staff who were invited to the focus group and interviews were also invited to take the survey.*

### 3.3.1 Focus Group

A focus group was used to identify the logic model of the PUF/FSCD Common Approach in Waverley School/Hillview School, and to reflect on the implementation of the PUF/FSCD Common Approach. Names of potential participants for the focus group were obtained from the client and the Program Coordinator of Waverley School. An email was sent to potential participants using business contact information inviting them to participate in the focus group. A follow-up email with logistics of the meeting was sent to the eight individuals (school administration and multidisciplinary team members) who expressed interest in participating in the focus group.

The focus group was scheduled for three hours. For the first part of the focus group, the researcher led the group through a process to develop a logic model for the PUF/FSCD Common Approach. The questions included: 1) What resources are required/used to deliver the PUF/FSCD Common Approach (Inputs); 2) What are the activities of the PUF/FSCD

Common Approach pilot project (Activities); 3) What is delivered/produced through the PUF/FSCD Common Approach (Outputs) 4) What are the desired outcomes/impact of the PUF/FSCD Common Approach (Outcomes).

The process included a combination of individual reflection, small group discussion, and large group discussion and brainstorming to identify the inputs, activities, outputs, and outcomes of the logic model; sticky notes were used during the process.

After the logic model, the focus group discussed the implementation of the PUF/FSCD Common Approach. Appendix A has the agenda for the focus group.

### **3.3.2 Survey**

A survey was delivered to seek perspectives of the PUF/FSCD Common Approach from those involved in the pilot project, the extent the pilot project objectives were achieved, and advice moving forward. A draft of the survey was developed in consultation with the client and Supervisor, and based on documents from Alberta Education regarding the FSCD program and the PUF/FSCD Common Approach. The survey was further refined based on the findings from the literature review (e.g. reflect the importance of family priorities).

The draft survey was put into the online survey tool, FluidSurveys, then tested with four individuals (two teachers, one provincial employee, and one individual familiar with both the PUF and FSCD programs). The individuals reviewed the survey for clarity, grammar, and time to complete the survey. Based on the feedback received the survey introduction was amended to clarify questions and the introduction was amended to reflect the actual time to deliver the survey. The survey was to be deployed during the same day of the focus group, but as a result of the survey testing, the release date was postponed after the focus group with the intent to use the focus group to clarify questions emerging from the testing. The delay also enabled irrelevant questions to be removed from the survey. Once the survey was updated based on the testing and focus group, it was tested with two more individuals for functionality. The final survey is included in Appendix B.

An email invitation, along with a Letter of Implied Consent, was sent to the 13 individuals participating on the PUF/FSCD Common Approach in the Waverley and Hillview Schools via the Program Coordinator. An email was sent the following day with a link to the survey, and a follow-up email reminder was sent a week before the survey closed via the Program Coordinator. Eleven participants completed the survey – a response rate of approximately 85 percent.

### **3.3.3 Interviews**

The semi-structured interviews were the third component of the research project. The purpose of the interviews was to provide more details around the process to implement the PUF/FSD Common Approach in Waverley School and Hillview School. The interviews

with the multidisciplinary team focused on the process to implement the pilot project, the differences from previous years, what interviewees would suggest to keep or change, and additional details around the logic model. Interviews with provincial employees focused on the history of the PUF/FSCD Common Approach, process, strengths, weaknesses, and characteristics of successful approaches. The interview questions are in Appendix C.

Potential participants were contacted by email, and face-to-face interviews were set up for 1 to 1.5 hours. Participants were specifically selected to reflect school-based, specialized services, and provincial perspectives of the PUF/FSCD Common Approach. In total, five participants were interviewed in four interview sessions. The conversations were digitally recorded, and brief notes were taken to support the interview process. Detailed notes were taken from the audio recording, and considered along with the focus group and survey results.

### **3.4 Data Analysis**

The focus group session was audio recorded, sticky notes were used to capture participant's thoughts during the logic diagram process, and handwritten notes were used by the research to capture high-level notes. The information from the session was summarized and circulated to participants for review and feedback.

The survey included a combination of Likert scale questions and open-ended questions. The Likert scale questions were produced in graphs by Fluid Surveys and placed in charts for the purpose of this report. The qualitative responses were analyzed by looking at common words and themes that emerged from the responses, the comments were organized by themes, and the frequency of comments was observed.

The interviews were audio recorded, and handwritten notes taken to capture observations and thoughts during the process. The audio recordings were translated into handwritten notes, and the handwritten notes were reviewed for concepts and themes that emerged, and organized by themes.

The information from the focus group, surveys, and interviews were organized by research question. In turn, the information was organized by themes. The literature review, in particular, informed the initiative process, strengths and opportunities to improve sections. Comments were reviewed, with an overriding concept for the comment identified. The concepts were then themed/grouped based on similar responses.

### **3.5 Project Limitations and Delimitations**

The following limitations and delimitations exist with this project:

#### **3.5.1 Limitations**

- The research project focused on the perspectives of the school administration, school-based, and specialized services teams delivering the initiative, and provincial staff. Central departments supporting the initiative (e.g. budget, transportation, planning, District Support Services) were not included in the research project. The research does not incorporate the perspective of the parents. In the future, any follow-up work with the project would ideally include the perspective of parents.
- The research project did not incorporate a control group or comparisons and made it difficult to determine if the results can be generalized to other situations.
- Team members previous, and degree of, experience in collaborative, multidisciplinary teams may influence perceptions of the effectiveness of the PUF/FSCD Common Approach.
- The research project included four interviews and five participants. More interviews would have expanded perspectives represented in the research project.
- Waverley has a culture of community-based, collaborative services for children with severe disabilities and their families; more work may be required to determine if the proposed model is applicable in other settings.
- The District is in the process of implementing an early years' evaluation strategy; the PUF/FSCD Common Approach is one component of the strategy, and may be influenced by the overall direction of the strategy.
- Directional changes from the Province during the project would influence the manner in which the PUF/FSCD Common Approach is delivered.

#### **3.5.2 Delimitations**

The research began as a formative process evaluation of the PUF/FSCD Common Approach pilot project. However, the structure to conduct the evaluation (logic model) was required to conduct a proper evaluation. As such, the research project focused on developing the logic model of the PUF/FSCD Common Approach pilot project, the process to deliver the initiative, and a preliminary evaluation of the project. The research focused on the team involved in delivering the initiative (Waverley School and Hillview School staff). Parents and central support staff (budget, transportation, planning, District Support Services) were not included in the evaluation, nor was a control or comparison group included due to time constraints.

All Waverley School and Hillview School staff who participated on the PUF/FSCD Common Approach pilot project were invited to participate in the survey. A focus group was conducted using eight members of the team; and three members of the team were invited to participate in interviews, along with one provincial staff member.

## 4.0 Findings

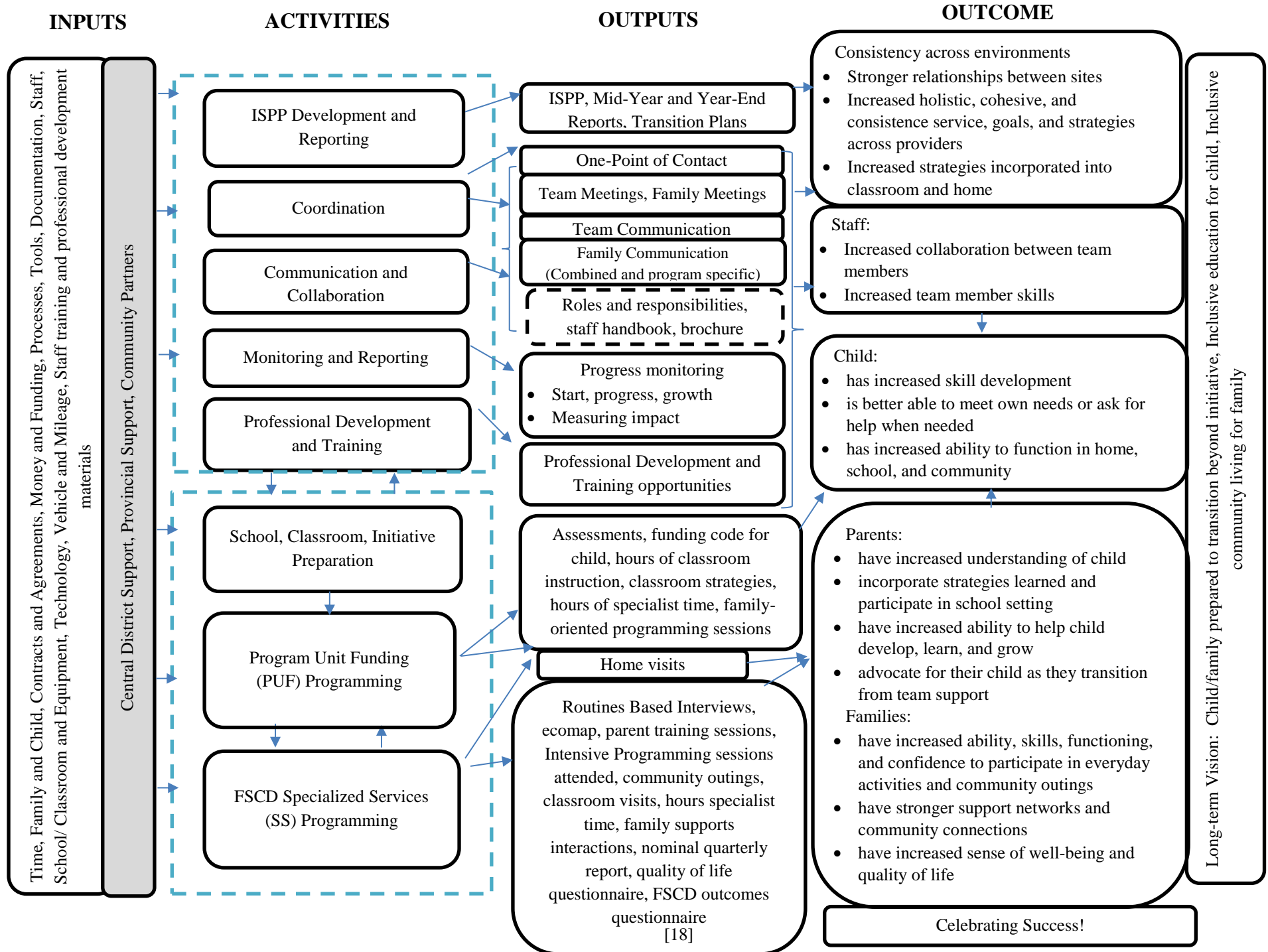
### 4.1 Introduction

This section provides the findings of the focus group, survey, and interviews. It begins with the logic model and process to implement the PUF/FSCD Common Approach in Waverley School. It continues with the findings of what extent the short-term objectives were achieved, followed by a preliminary assessment of the implementation of the project focusing on communication, collaboration, the evolution of the team, and strengths and opportunities for improvement. It concludes with participants' perspectives of efficiencies created through the project.

### 4.2 Logic Model

This section provides an overview of the PUF/FSCD Common Approach logic model. The logic model was created based on a focus group conducted on April 19, 2016, and follow-up interviews. The focus group participants included the eight individuals who were part of the PUF/FSCD Common Approach in Waverley School/Hillview School. The focus group participants included school administration and multidisciplinary team members participating on the approach. The project client participated as an observer. The logic model, found in *Figure 5: Logic Model for PUF/FSCD Common Approach in Waverley School/Hillview School* was fine-tuned based on individual interviews conducted between May 9 and 13, 2016 with three participants from the focus group. A detailed discussion of inputs, activities, outputs, and outcomes is found in Appendix D.

**FIGURE 5: LOGIC MODEL FOR PUF/FSCD COMMON APPROACH IN WAVERLEY SCHOOL/HILLVIEW SCHOOL**



### **4.2.1 Inputs**

The focus group identified several inputs through a large brainstorming session. Time was identified first by the group as “the most precious resource” – required for the team to collaborate and for personal training to occur. The family(ies) participating on the PUF/FSCD Common Approach were identified as inputs, along with the contracts and agreements for each of the programs. Two sources of funding (Program Unit Funding; FSCD Specialized Services Funding) were also identified, along with money to purchase equipment and toys. The school and classroom environments were mentioned as inputs, set up with specialized equipment and toys, along with technology (computers, GoogleDocs, I pads), and vehicles and mileage.

The focus group identified staff and the multidisciplinary team as inputs, along with staff training and professional development (PD) materials, and external supports from the District, Province, and community partners. The multidisciplinary team included: teachers; FSCD and PUF Coordinators; Occupational Therapists; Speech Language Pathologists; Physical Therapists; Educational Assistants; Speech Language Pathologist Assistants; and, Behavioural Consultants. The focus group indicated in some cases, there were two specialists. The Family Liaisons/Family Support Workers were also identified as potential resources. External supports identified included: including District central supports, such as the Early Years Supervisor, Inclusive Learning, Budget Services, District Support Services, Transportation Services, and the Planning Department. The FSCD Caseworker from the provincial government and community partners (Glenrose Rehabilitation Hospital, doctors, and pediatricians, Alberta Aids to Daily Living) were identified as supports.

Processes, tools, and documents, such as roles and responsibility, were identified as inputs for future years but were outputs this year.

### **4.2.2 Activities**

The focus group identified activities through a period of individual reflection followed by a large group discussion. The activities were fine-tuned during the interview process to support groupings of activities. The activities can be grouped into two large categories: coordination and team development; and, program delivery.

The focus group discussed several activities related to coordination and team development. Individualized Service Program Plan (ISPP) development and reporting was identified as a key activity. Coordination of activities, staff, and services was identified as a key activity, as was communication and collaboration within the classroom, between teams, with parents, and Inclusive learning. Monitoring and reporting of weekly goals and communicating observations and concerns within the team and professional development and training were also identified as activities.

The focus group identified three key components of program delivery can be divided into three categories, including school, classroom, initiative preparation; Program Unit Funding (PUF) programming; and, FSCD Specialized Services programming. More information about the activities is found in Section 4.3 Initiative Process.

### **4.2.3 Outputs**

The focus group identified a number of outputs through a large brainstorming session, categorized by the groupings in the activities: coordination and team development; and, program delivery (PUF and FSCD Specialized Services).

#### ***4.2.3.1 Coordination and Team Development***

Several documents were identified related to the ISPP including: child/family objectives and roles and responsibilities; midyear report; yearend multidisciplinary report; and, a proposed report if the child continues the program. Another output identified was one point of contact for the parents. The focus group identified several data and measurement documents such as a monitoring progress document, measurement of impact, FSCD quality of life questionnaire, and FSCD outcomes questionnaire.

The focus group identified coordinating/participating in team meetings as an activity. Through the interview process, participants identified six formal team and/or family meetings related to the ISPP. Communicating observations and sharing issues/concerns through GoogleDocs, email, and phone calls were identified as activities. The frequency of communications is an output of these communications. In addition, focus group identified several communications modes to parents that included brochures, websites, and newsletters. Specific to the PUF program are parent communications on SchoolZone and Daily Communications book. As well, specific to the Specialized Services program are home visit notes. The interviews provided an opportunity to clarify which communications methods were specific to each program component (PUF or Specialized Services).

As well, the focus group identified trained staff as an output in the initiative, and one-time outputs that will be used as inputs during future years. For example, roles and responsibilities and a staff handbook, and a communications brochure describing the initiative.

#### ***4.2.3.2 Program Delivery***

##### ***Program Unit Funding Outputs***

The outputs for the PUF program were identified during the focus group and fine-tuned during the interview process. Outputs included completed assessment tools by the teacher, Speech Language Pathologist, Occupational Therapist, and Physical Therapists; funding code for a child as a result of the assessments; hours of classroom instruction and specialist time; and family-oriented programming sessions.

### *Specialized Services Outputs*

The outputs identified for the Specialized Services program were identified in the focus group and interview process, and fine-tuned during the interview process. Outputs identified include Routines Based Interview (RBI) based on Robin McWilliam's work to walk through a day with the family; an ecomap to identify the networks of a family; parent training sessions; community outings with the team and family; nominal quarterly report that identifies specialists time dedicated to each child; a quality of life questionnaire and FSCD outcomes questionnaire.

### *Home Visits*

Common to both the PUF and Specialized Services programs are home visits, which are delivered by the Specialized Services team in the pilot project.

## **4.2.4 Outcomes**

The focus group identified six outcomes from the PUF/FSCD Common Approach: consistency and efficiency across environments; staff strengths and development; positive child outcomes; positive family outcomes; celebrate success!!; and, a long-term goal of inclusivity.

### ***4.2.4.1 Consistency and Efficiency Across Environments***

The focus group identified several outcomes that address consistency and efficiency across environments. An intended outcome identified of the PUF/FSCD Common Approach is the increased holistic and cohesive services across the PUF [Hillview School] and Specialized Services [Waverley School] providers in a manner that makes it easier and less overwhelming for families. Part of the coordinated services includes increased strategies incorporated into both the classroom and home. Stronger relationships between the two sites was also identified as an important outcome.

### ***4.2.4.2 Staff Strengths and Development***

The focus group identified the importance of increased collaboration between team members and increased team member skills developed through collaboration, communication, and sharing of best practices.

### ***4.2.4.3 Positive Family Outcomes***

The focus group identified the importance of positive family outcomes. The family outcomes have several components, including parents' increased understanding their child's strengths, abilities, and needs and using the strategies they learn from the initiative to help their child in school, home, and community settings. Through this process, parents have increased ability to help their child develop and grow in a variety of settings, have an improved sense of well-being and mastery through their new knowledge and skills, and increased confidence in parenting and being with their child in the community. Another intended outcome of the

initiative is that parents are strong advocates for the child when they no longer have the support of the team, and have stronger informal and formal community networks and connections. The focus group discussed an improved sense of family well-being and stronger quality of life as a result of the initiative.

#### ***4.2.4.4 Positive Child Outcomes***

The focus group discussed several aspects of positive child outcomes including increased growth, development, and independence for children in the initiative. Outcomes for the child includes increased skill development and functioning in a variety of areas that include communication, fine/gross motor skills, self-help, self-regulation, play and social skills, academic learning, emotional and physical well-being. Through the initiative, children have increased ability to meet their personal needs or ask for help when the need it. The focus group also identified further outcomes such as the child achieving goals identified for him/her, is reaching his/her potential, and has increased ability to function in a variety of contexts – home, school, and community.

#### ***4.2.4.5 Celebrating success***

The importance of celebrating success was identified as an important outcome.

#### ***4.2.4.6 Long-term vision: Inclusivity***

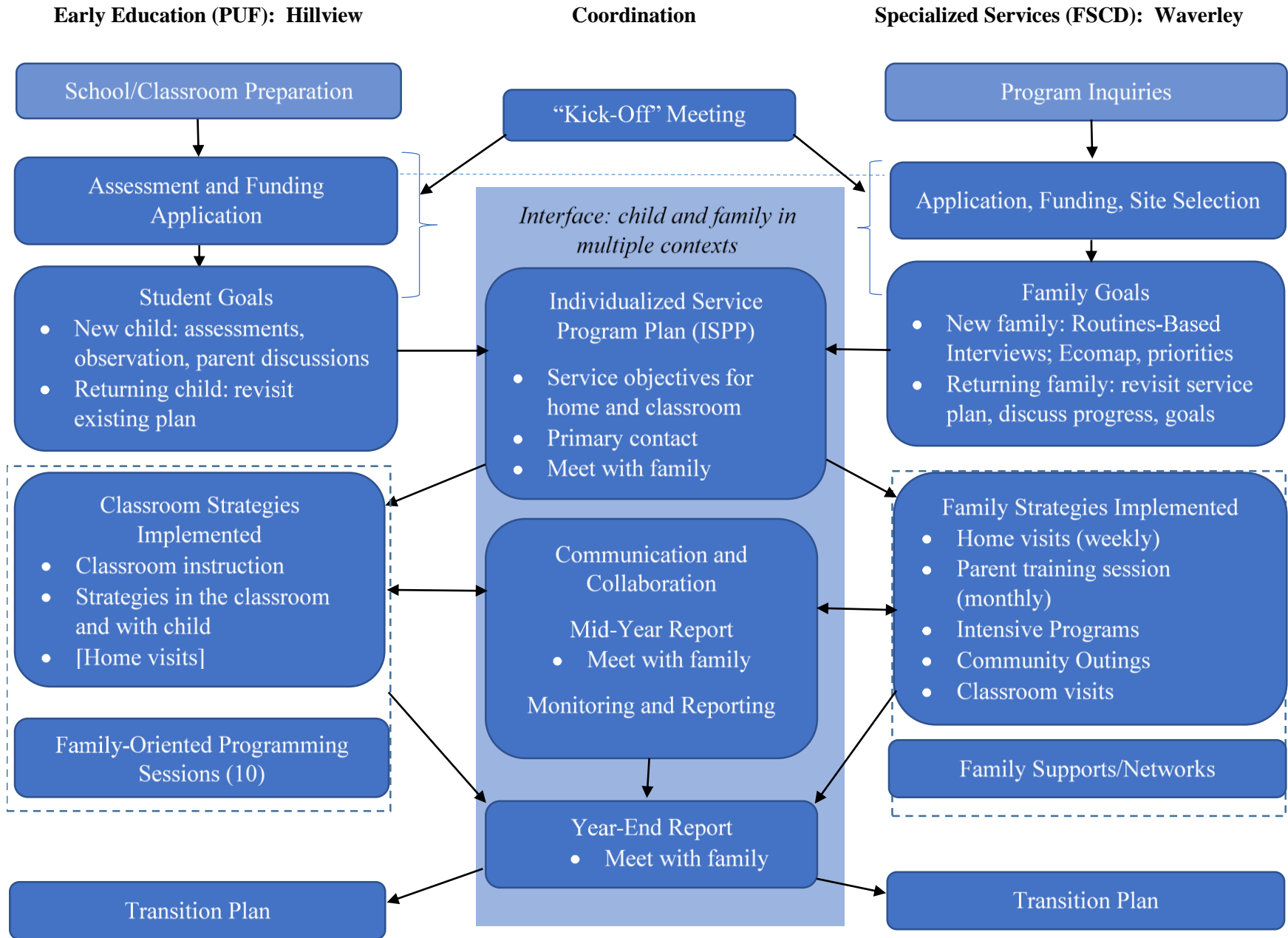
A few participants shared long-term visions when the child transitions beyond this initiative – with the child in inclusive education and the child and his/her family participate in inclusive community living through the skills provided in the initiative.

### **4.3 Initiative Process**

Between May 9-19, 2016, interviews were conducted with individuals involved in the PUF/FSCD Common Approach in Waverley School and Hillview School, and the Government of Alberta’s Family Support for Children with Disabilities, Ministry of Human Services. Four semi-structured interviews were conducted with five individuals. The interviews with school staff included a discussion on the process to implement the PUF/FSCD Common, differences from previous years, and suggestions to change or keep. The interviews also provided background on the history of the Common Approach in Waverley School. Interviews with provincial staff focused on an overview of the PUF/FSCD Common Approach, and strengths and challenges of the PUF/FSCD Common Approach.

The *Figure 6: PUF/FSCD Common Approach Pilot Project Model: Process* shows the process used to implement the PUF/FSCD Common Approach and has been derived from information in the interview process and focus group.

**FIGURE 6: PUF/FSCD COMMON APPROACH PILOT PROJECT MODEL: PROCESS**



To introduce the PUF/FSCD Common Approach pilot project and the Specialized Education program to Early Education staff, a PD day was held at Hillview School in Fall 2015. The PD day also provided advice on how to identify children for the PUF/FSCD Common Approach. After the PD day, a select number of families with preschool aged children with severe disabilities from Hillview School's Early Education program chose Waverley School's Specialized Services Team to provide family supports.

As part of the pilot project, an introductory "kick start" meeting was held with the team members of the FSCD Common Approach.

Typically, families who are interested in receiving Specialized Supports from Waverley School contact the school beginning in January to register their children for the September school year. Families register their children in an Early Education PUF program, then apply for FSCD Specialized Services funding from the Government of Alberta. Once a family receives funding for FSCD Specialized Services, they select their preferred service provider. If Waverley School is the family's preferred service provider, the family indicates their choice to the Government of Alberta's FSCD caseworker, and Waverley School receives a letter from the Government of Alberta indicating when the family will start with the program. The family then signs a service agreement with Waverley School Specialized Services team.

Once the family is registered with Specialized Services at Waverley School, members of the team meet with the family at their home to determine family's priorities and needs. A primary coach is selected as the main team contact for the family based on the family needs and the skills and training of the coach. For example, if communication is the primary goal for the family, a Speech Language Pathologist may be identified as the primary coach. The primary coach and an additional team member will conduct a Routines Based Interviews based on Robin McWilliam's work, and an ecomap.

As part of the RBI process, the team will *walk through a day* with the family and identify challenges, strengths, and where the family would like to see the greatest impact. For example, the team may provide parents strategies to support their children through mealtime or bedtime routines, or identify ways to improve communication between the child and the parents.

The primary coach will also develop an ecomap to identify informal and formal supports. For example, informal supports may be friends, family, sports teams, or faith-based supports. Formal supports may be a pediatrician or autism clinic. One of the intents of the Specialized Services program is to help the family build a network of supports.

For families who have been in the Specialized Services program in a prior year, they will have a service plan in place, and the primary coach will confirm what the family has achieved with their child over the summer months, and confirm goals over the upcoming year.

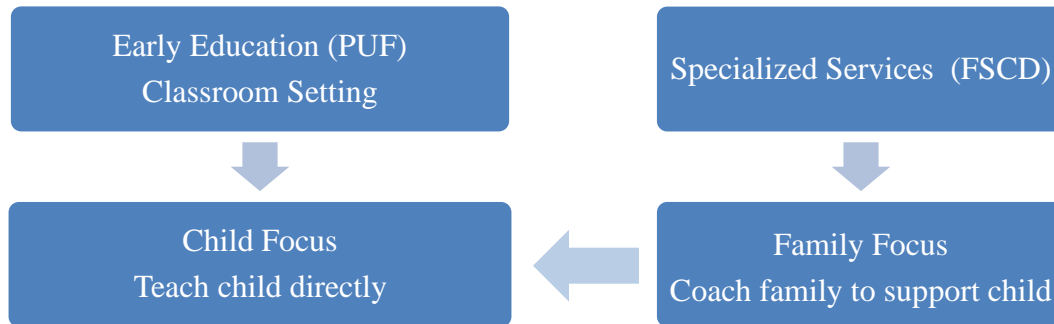
As part of the Early Education program, the school and classroom are prepared to receive students for a new school year. For example, classrooms are set up to support learning for children with appropriate tools and technology, and children are placed in classroom groupings that consider the personalities and needs of children who are registered. When the children are in the classroom, the teacher and specialists (Occupational Therapists, Speech Language Pathologists, and Physical Therapists) conduct assessments and probes with the children. Furthermore, teachers observe the child in the classroom. The school-based team would typically hold discussions with parents about their child and desired priorities, but as part of the PUF/FSCD Common Approach, this task was aligned with Specialized Services conversations. The assessments are used to identify the funding code, severity of disability and needs for a child. As well, funding applications are completed for provincial funding for the child in the Early Education program. The information from the assessments, observations, and parent conversations also inform goals for the children in the classroom. For children who are returning to the Early Education program from the previous year, a service plan for the child will also be created.

Family goals are developed in the home setting, and goals for the child are created in the school setting. The Specialized Services team meet with the teacher to discuss what they see as areas of overlap. For example, if toilet training or helping a child eat during snack time is identified in both the school and home setting, a common strategy may be identified for both teams. One interview participant indicated that before one plan with the PUF/FSCD Common Approach, a family would be required to meet with multiple teams over multiple days to create two separate plans that might not be aligned or use different strategies for similar goals. However, one plan is more manageable for the family than two goals. However, more work may need to further integrate the two plans as another interview participant indicated that the classroom goals identified for one child were more fulsome than those reflected in the ISPP, and the more fulsome plan guided the school-based team.

To create the ISPP, several team meetings were coordinated between the Early Education Team and Specialized Services Team. A meeting was held between the two teams to create a service plan with goals and objectives from the family and classroom goals. Then, a service plan meeting was held with the team and the family. The meeting with the family included the Specialized Services team and teacher, with specialists from the classroom intended to provide support in the background to minimize the points of contact with the family.

Once the ISPP was formalized, the Early Education team and Specialized Services team implemented strategies based on goals and objectives in the plan. The Early Education team worked directly with the child, helping the child learn skills to function in the classroom. The Specialized Services team worked with the family to identify strategies to work with their child in the home and community settings. The differences are found in below in *Figure 7: Focus on Early Childhood and Specialized Services Programs*.

**FIGURE 7: FOCUS OF EARLY CHILDHOOD AND SPECIALIZED SERVICES PROGRAMS**



In the classroom, the teacher provided classroom instruction to the child and implement strategies in the classroom. As well, classroom specialists (Speech Language Pathologist, Physical Therapists, Occupational Therapists, etc.) worked with the child in the school setting with school-related tasks. Prior to the PUF/FSCD Common Approach with Hillview School, members of the Early Education team would conduct home visits with the family to get a holistic picture of the child. As well, 10 family-oriented programming sessions were delivered for the families.

With the family, the Specialized Services primary coach visits the family weekly to work on strategies identified in the home. As well, monthly training sessions and intensive programs are delivered for families. For example, the *More than Words* program provides eight classroom sessions for parents to learn strategies to engage children on the autism spectrum and help their child develop language skills. As well, the intensive program includes three sessions where parents receive video feedback from their Speech Language Pathologist on how to improve the approach with their child. Community outings are held once a month. With one staff for each parent and child, community outings are customized for each family. For example, a community outing may be held in a restaurant where a family identifies an area of need (child will not sit still), and the staff works with the family to identify ways to help them meet their goal.

The Specialized Services team conduct classroom visits to observe the child in the classroom to get a holistic view of the child in multiple settings, and Early Education and Specialized Services communicate throughout the school year during the classroom visits, or through phone calls, emails, or progress updates on GoogleDocs.

The team reviewed the ISPP in January/February – half-way through the school year through a team meeting with the classroom teacher and Specialized Services team, followed by a meeting with the classroom teacher, Specialized Services team, and family to discuss progress. The intent of this process is to have a smaller team to meet with family, rather than multiple specialists from multiple sites. However, ensuring all members receive the information they need to understand the whole child is a consideration. The team then adjusted the ISPP as required based on the midyear update. For example, through an established trust relationship, families may identify areas they would like more help with.

At the end of the year, the team will create a year-end report for the child and family. This year, the year-end report was created by the team through communication through emails and the GoogleForm. Once the year-end report is completed, the team met with the family to discuss progress and next steps. For children and families who continue the program, a service plan is created for the next year. For children leaving either of the programs, a transition plan is created.

While the transition plan is created at the end of the year, conversations about the transitions are held with the family very early in the process. For example, from the Early Education setting, families may determine if they would like their child to continue in the Early Education program or transition into an inclusive kindergarten program. If the family would like their child to enter kindergarten the following year, the teacher prepares a storyboard to introduce the child to the new school and conducts visits to the new school with the child/family. Furthermore, the Specialized Services team helps the family develop a transition plan. For example, if the family would like to continue with Specialized Services, a funding application is prepared for the following year for the Government of Alberta’s consideration. Alternatively, the family may be comfortable with the strategies they learned to support their child, and no longer need support from Specialized Services.

#### **4.4. One Plan, One Team**

Two short-term objectives of the PUF/FSCD Common Approach are: 1) one team, one plan that provides coordinated services; and, 2) team members work together to identify strategies. The survey delivered to participants involved in the PUF/FSCD Common Approach in Waverley School/Hillview School asked participants about these concepts.

##### **4.4.1 One Plan**

Survey participants were asked questions about the “One Plan” ISPP. Participants indicated the ISPP reflects the family’s priorities (100 percent), emphasizes individual

services for the child and his/her family (100 percent), and meets the child's/family's needs in a coordinated way (72.7 percent). As well, participants indicated team members worked together to develop the ISPP (72.7 percent). However, just over half of the participants (54.5 percent) indicated roles and responsibilities are clearly defined.

#### **4.4.2 One Team**

Survey participants were asked if the "One Team" in the pilot project met each child's/family's team in a coordinated way; only 36.4 percent agreed with the statement.

The majority of participants (90.9 percent) worked on another multi-disciplinary team prior to participating on the PUF/FSCD Common Approach. Compared to other multi-disciplinary teams, 60 percent indicated the PUF/FSCD Common Approach was more efficient. Several reasons were provided why the pilot project was more efficient, including: communication; intentional collaboration; focused support for children and families in their homes; training to teach families to meet the needs of their child; one team/one point of contact makes it easier for the family; one document that provides seamless support; and coordinated professional services. Several reasons were provided why the approach was less efficient, including: two distinct teams existed; two sites made it difficult for collaboration to occur "on the fly"; large number of people involved; unclear roles, responsibilities, collaborative processes at the beginning; lengthy and frequent meetings and observation times that took away from Hillview staff to collaborate on other children; one child per team to discuss rather than multiple children due to classroom placements; different contexts between class and home and applicability of strategies.

There were 27.3 percent of participants who participated in a PUF/FSCD Common Approach with another organization. Compared to other PUF/FSCD Common Approach, 100 percent of respondents indicated the pilot project at Waverley School/Hillview School was about the same or more efficient than other approaches. Efficiencies identified include collaboration built into the program early, more easily accessible sharing of information, set meeting times between two teams and the family instead of one consultation with other FSCD providers.

### **4.5. Communication and Collaboration**

The survey included several questions related to communication and collaboration. This section summarizes the findings related to communication and collaboration.

### 4.5.1 Communication

When asked to what extent they agreed or disagreed there is good communication among team members and the family, 72.6 percent of participants who agreed there was good communication.

The survey presented various methods of communication. Participants were asked to rate communication activities by the extent they believed the methods supported clear communication: 1) between the school-based team members and specialized services team members and the family; and 2) between school-based and specialized services team members. The positive responses (strong and very strong) are combined together to show which communication activities participants believed were the strongest. Similarly, the negative responses (weak and very weak) are combined together to show which communication activities participants believed were the weakest. *Table 3: Activities that Support Clear Communication between School-based and Specialized Services Team Members and Families* shows a summary of the findings.

**TABLE 3: ACTIVITIES THAT SUPPORT CLEAR COMMUNICATION BETWEEN SCHOOL-BASED AND SPECIALIZED SERVICES TEAM MEMBERS AND FAMILIES, n=11**

Communication Activity	Strong / Very Strong	Weak / Very Weak	Not Applicable
Consultations and/or home visits	100%	0%	0%
Phone calls with families	100%	0%	0%
Teacher communication books	90.9%	9.1%	0%
One plan	81.8%	18.2%	0%
Classroom newsletter	45.4%	36.4%	18.2%
School newsletter	27.3%	45.5%	18.2%
SchoolZone	18.2%	81.9%	0%
Website	9.1%	81.3%	9.1%

The results for communication between the school-based and specialized team members are presented in *Table 4: Activities that Support Clear Communication between School-based and Specialized Services Team Members*.

**TABLE 4: ACTIVITIES THAT SUPPORT CLEAR COMMUNICATION BETWEEN SCHOOL-BASED AND SPECIALIZED SERVICES TEAM MEMBERS, n=11**

Communication Activity	Strong / Very Strong	Weak / Very Weak	Not Applicable
One-on-one information interactions	90.9%	0%	9.1%
Regular team meetings	81.9%	9.1%	9.1%
School visits	81.9%	9.1%	9.1%
One plan	72.8%	18.2%	9.1%

Other communication methods identified by participants included: email; phone calls; shared tracking document (e.g. GoogleDocs); and, updating service plans and reports.

When asked what communication methods are most effective, responses varied from personal interactions such as face-to-face meetings, informal discussions, and visits to shared tracking documents, telephone calls, and emails. There were comments received about the importance of taking the time to build relationships upfront through personal interactions, and maintaining relationships through phone calls and emails. As well, representatives from both teams when meeting with the families was suggested.

#### 4.5.2 Collaboration

When asked how well the team worked together, the majority of survey participants agreed (81.8 percent). The table below shows the extent they agree with characteristics of team collaboration. The positive responses (agree and strongly agree) are combined together to show which statements the team agreed with most. Similarly, negative responses (disagree and strongly disagree) are combined together to show which statements the teams disagreed with the most.

**TABLE 5: COLLABORATION BETWEEN TEAM MEMBERS, n=11**

Collaboration	Agree / Strongly Agree	Disagree / Strongly Disagree
Our team works well together	81.8 %	18.2%
Team members work together to meet shared goals	72.7%	27.3%
Team members work together to meet challenges or setbacks	72.7%	27.3%
The team regularly tracks progress and adapts plans as needed	81.8%	18.2%
Collective wisdom is valued by team members	72.7%	27.3%

The participants identified several ways the school-based and specialized services team members collaborate with parents, including: home visits, school visits, meetings, parent sessions, Family Oriented Programming Sessions (FOPs), community outings/visits, RBI, email, phone calls, and team member check-ups with families.

The participants identified several ways school-based and specialized services team members collaborate with each other. The most frequently identified ways of collaboration identified included: meetings, including meetings to review team goals; email; phone calls; shared documents such as GoogleDocs. Other collaboration methods identified included classroom visits and classroom observations; creating the ISPP; discussions in-person; and, contact notes.

When asked about the most effective methods of collaboration, survey participants discussed the modes, frequency, quality, and content of communication. The mode of communication most commonly mentioned was face-to-face meetings (e.g. visits, meetings). However, there were comments made that while effective, may not always be possible or efficient. Other modes of communication specifically identified as effective included email and shared comments (GoogleDocs). The frequency of communication was also mentioned – regular communication was identified as important. The quality of communication – open and honest – was also identified. The content of communication was identified, and included working through problems and developing ideas together, the importance of the team sitting to discuss expectations, issues, progress, and updates. Discussing communication processes was also identified. There was an observation shared that minimum collaboration occurred outside from classroom observation and meetings to review goals.

## **4.6. Preliminary Assessment of Implementation**

### **4.6.1 Strengths**

The focus group, interviews, and survey participants identified several strengths of the PUF/FSCD Common Approach in Waverley School/Hillview School.

Several strengths identified related to the family. This included one point of contact for families, holistic/cohesive services, consistent staff, increased programming for the child, consistent messages across home and classroom environments, and good support outside of school. Community outings were also identified as meeting families “where they are at”. Some participants also identified the benefit of family outcomes, and the potential to support children and their families through this initiative.

Strengths were identified related to one plan with home and family goals to guide the team with common strategies. As well, it was mentioned the PUF/FSCD Common Approach enables team members to know the whole child. One participant shared that when families have other service providers [outside of school], the team may not know the goals from the other providers, and time may be required to identify the goals. Furthermore, with the PUF/FSCD Common Approach, consent is no longer required to talk with another agency.

Internal service providers have communication channels within the District that external providers may not have. One participant indicated parents may struggle to get accommodations for their child in a school setting. However, if the school sees the benefit [by participating in the PUF/FSCD Common Approach], “all is taken care of.”

Another strength identified was the different perspectives, understanding, and collaboration between Waverley and Hillview Schools. An observation was shared that professionals in the same field can collaborate on the same child and come up with more ideas as “two heads are always better than one”. In other circumstances, two different specialists may work in isolation or on the same thing in two different ways.

Other strengths identified included Common Approach practices carried into the PUF program, coordinated District approach that contributes to building a stronger team, great outcomes, and working with people to implement change.

#### **4.6.2 Opportunities to Improve / Advice Moving Forward**

The research participants identified several opportunities to improve the PUF/FSCD Common Approach in Waverley School/Hillview School.

The most frequently mentioned suggestion to improve the pilot project was to: clearly define roles, responsibilities, expectations; develop protocols and processes for communication and collaboration; and, explain how team members will work together. A comment was shared how what was communicated about the PUF/FSCD Common Approach was different than what was implemented, and communication felt “top down”. Some participants were also unclear about the roles of the two specialists on the team. Furthermore, related to processes, a suggestion was made to clearly define data collection expectations. A suggestion was made to use GoogleDocs. Other challenges that could be addressed included identifying who to talk to about issues or how to address different strategies presented by professionals.

There were suggestions about how systems and structures could improve processes. There were also observations were made about the differences between PUF and FSCD reporting requirements, definitions of disability between the two programs, and timing of reports. As well, while there was one plan, there was an observation shared that the school goals may not be fully reflected in the plan. As well, the two schools in the pilot project are in two different catchments, or groupings of schools, within the District. As another example related to structures, a suggestion was made to establish common practices across the District and to identify a team lead as a “go to person” for each profession. As well, technology was identified as limiting, and the ISPP process could be made easier if available on PowerSchool. Observations were made to further align the PUF/FSCD Common Approach, including: the FOPs requirements under PUF, and parent training sessions under FSCD and transitions.

Time was identified as the greatest challenge the team faces and was needed to have more deep, expanded conversations, to discuss how things are doing, and to discuss the rationale for different strategies. A couple of research participants observed the importance of investing time together as a team at the beginning of the year as rapport is being developed. One participant suggested

setting up team meetings for the entire year upfront. Other comments included scheduling more opportunities for team members to meet and collaborate, and to align team conversations to already scheduled Monday meetings.

One survey comment shared was “collaboration is key to having this work”. On one hand more conversations between team members were suggested. On the other hand, an observation was shared about **how** the team collaborates and communicates is more important than frequency.

The pilot project included team members from two different sites coming together, each with different ways of doing things and different work cultures. There were observations shared of the growing awareness that things are done differently in each place, and the importance of relationship building and building trust. As one participant said, “relationship is a big piece of it.” An observation was shared that developing processes could support relationship building. The number of sites is further complicated as parents select the school and the FSCD Specialized Services provider they want.

With one site, staff could “pop in and out” of the classroom to observe children and to address immediate concerns in the classroom. As well, in one site, staff share office space and can communicate frequently. However, with two sites, intentional effort is required to have conversations. Furthermore, classroom visits are scheduled ahead of time in large chunks of time because of the time required to travel. When many visitors come to the classroom, it may be disruptive for the children who are routine-based, and the classroom dynamic may be different. A suggestion was made to focus classroom observations with students in the classroom, and discussions outside of the classroom.

Another challenge identified was different routines or strategies provided for children by different team members. Classroom team members are balancing strategies based on what they see in the classroom for a particular child and all students whereas the Specialized Services team is considering factors such as which strategies are most applicable to the family’s context. As well, families may share different information or concerns with different team members.

An observation was shared that university does not fully prepare staff for the experiences faced in the classroom. Furthermore, skillsets are required to work within an interdisciplinary team and unique characteristics to work with parents and multiple types of teams. Training was also mentioned as an opportunity for improvement, including incorporating shared Professional Development opportunities for both sites that would enable feedback into the team’s practices; providing opportunities for members to increase understanding and familiarity with the PUF/FSCD Common Approach and specialized services through information-sharing and open communication; and, cross-training between teams.

There were suggestions on creating efficiencies through classroom placements of students. For example, placing PUF/FSCD Common Approach students in the same classroom, or time period, would enable teams to gather around multiple children, rather than one child per class. As well, to support the classroom, a suggestion was made to limit classroom visits to observations only, limit the number of visitors, and having debriefing conversations outside of the classroom to limit disruption. A suggestion was also made to have one team on one site with school staff trained in FSCD Specialized Services and the classroom team as a lead coach.

There was awareness that, while “ultimately a great concept”, more work was created before expanding the approach across the District. A suggestion was made to “be cautious, take it slow, start small, and then build”. Another suggestion was made to pilot for another year to enable clearly defined roles, responsibilities, and procedures. As well, a comment was made “that it is a process” and “that things may have to change and adapt as you are going through the process of moving to this approach”.

#### **4.6.3 Team evolution**

One of the secondary questions was how has the team evolved throughout the process. Responses received included: communication improved and there is open conversation; the team is becoming more comfortable with each other; the team has identified a system [of communication] that works for them through GoogleDocs; and, there was a lot of coordination. There was also a comment that it was a learning curve for everyone. The question was asked during the focus group – seven months into the pilot project. As such, the team is still in the process of developing and defining itself.

#### **4.6.4 Efficiencies**

Interviews with District staff demonstrated a consensus that the PUF/FSCD Common Approach in Waverley School and Hillview School created efficiencies for the family rather than the team. While the term efficiency was left open-ended through this research project, comments provided by participants related primarily to streamlined processes and time saved for parents through navigating the systems and services, thereby minimizing inconsistencies and frustrations for parents. As well, efficiencies related to time and labour expended by staff to create a new way of doing things.

Participants indicated the pilot project created efficiencies for the family because they have one team (rather than two), one point of contact to call when they have questions or problems, and one document (plan) to refer to. One participant indicated “It is more efficient for the family because now they can get all the services they need in the site close to home...it’s a one-stop shop without having to drive across the city for it.” As well, the team is coordinating the services, rather than the family.

On the other hand, participants indicated combining the two teams to serve the family has been challenging and requires more time and work, in particular since it has been such as large team. One of the survey participants indicated “I feel the common approach has made things less complicated for the parents, but that it is now more complex for the classroom teacher.”

Some participants indicated they believed efficiencies would come with clear protocols, communication challenges, progress tracking, information sharing, and relationship building – and they were in the process of figuring that out. Another observation was made about developing the culture for this type of work over time. There were contrary opinions about the trade-off between the time and actual intended outcomes. On one hand, the process requires a significant amount of expended time. On the other hand, as one participant indicated “despite all of the challenges and inefficiencies it’s all worth it in the end” when referring to the benefits to the family.

## **5.0 Discussion and Analysis**

### **5.1 Introduction**

The PUF/FSCD Common Approach was created to bring together two programs for preschool aged children with severe disabilities and their families. Through the PUF/FSCD Common Approach, children and their families are to receive coordinated services through one team and one plan across multiple settings (school, home, community). In 2015-2016, Edmonton Public Schools piloted an initiative on delivering a coordinated PUF/FSCD Common Approach in multiple sites to learn from the initiative and how a flexible model could possibly be applied throughout EPS early years' locations.

This section discusses the findings from the research project, with a focus on the primary research question: To what extent has the PUF/FSCD Common Approach provided coordinated, collaborative services to families accessing the pilot project at Waverley School/Hillview School. It explores how the multidisciplinary team has operated, compared to literature review findings and concludes with summary thoughts.(The secondary research questions are addressed in Section 4.0, the findings for the report.)

### **5.2 Multidisciplinary Team**

Given the complexity of supports and services, the literature review indicated that multidisciplinary teams are required to support children and their families (Burder, p.340; Canary, p.417), require professionals to go beyond their traditional role of expertise (McCollum, p.7).

The largest input identified during the focus group was the staff/multidisciplinary team, that included teachers, program coordinators, specialists (Occupational Therapists, Speech Language Pathologists, Physical Therapists, and Behavioral Consultants), Educational Assistants, Speech Language Pathologist Assistants, and Family Liaisons/Family Support Workers when needed.

With the vast roles and expertise on the team and the complexity of services provided to the child and his/her family, as one participant indicated, university does not prepare you. Another observation shared during the interview process is that to participate on the PUF/FSCD Common Approach, more than just professional experience is required.

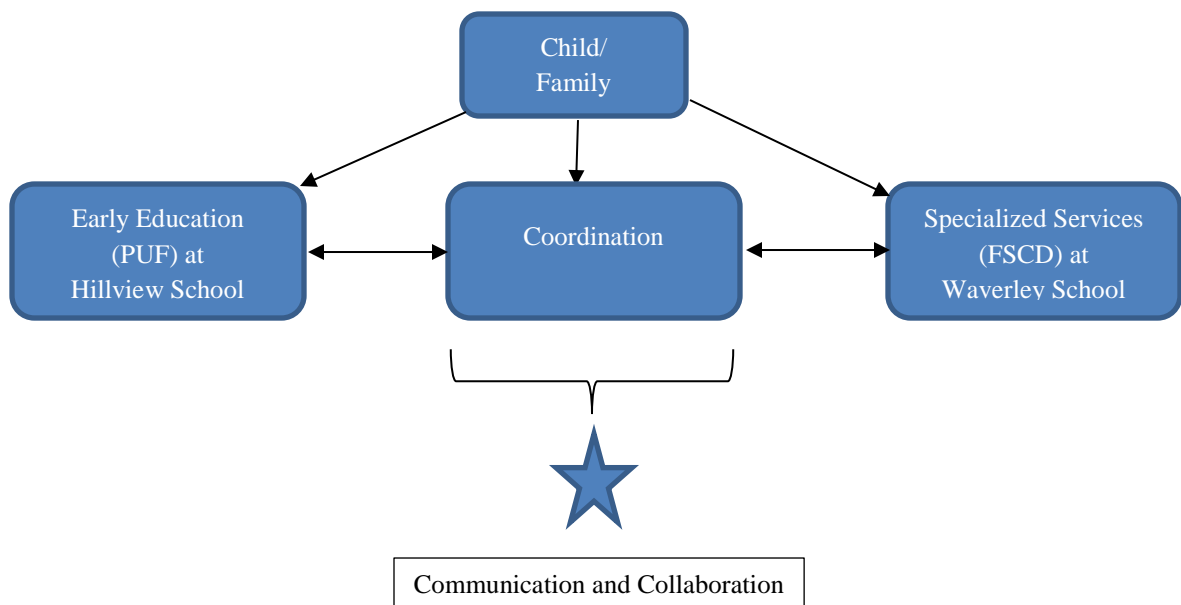
The pilot project used the primary coach model, which provides one point of contact for families. The primary coaches for the pilot project were specialists from the Specialized Services team who had skill sets that aligned with each of the family's priorities and needs. The family contact for the Early Education team who previously conducted home visits was integrated into the primary coach. Wall indicates the approach uses one-point of contact to

manage services for the child/family and utilizes meetings with all members of the team (p.171). This approach is reflective of Sheldon’s and Rush’s work on the primary coach approach. While the approach addresses the needs of the family, intentional effort is required to meet the information/context needs of all team members to serve the child/family to the best of their ability. For example, when a school team member conducted home visits, they were able to see the child they were working within multiple contexts. There is a potential for a gap to exist where team members are not able to see the child in multiple settings. This may require consideration of potential ways to integrate school-based team members as supporters or observers during the home or community visits, and can increase team members understanding of the other roles on the team. As well exploring ways to enhance communication and collaboration may be a consideration.

The PUF/FSCD Common Approach in Waverley School/Hillview School integrates two programs through coordination, which require, as indicated by one participant, intentional collaboration, and communication.

*Figure 8: Overview of PUF/FSCD Common Approach Pilot Project Model: Waverley School/Hillview School demonstrates the relationship between the two programs and the importance of communication and collaboration as the “glue” that brings the initiative together.*

**FIGURE 8: OVERVIEW OF PUF/FSCD COMMON APPROACH PILOT PROJECT MODEL: PROCESS**



Through the research of the pilot project, collaboration became synonymous with communication. When asked about effective methods of collaboration, participants repeatedly identified communication – the mode, frequency, quality, and content. Given the different types of responses, team members had different communication expectations and needs, which further adds to the complexity of a multidisciplinary team.

Nevertheless, the most frequently mentioned method of communication was face-to-face interactions. This aligned with the questions related to communication where survey 100 percent of participants identified interpersonal relationships with parents (in-person or at home) as strong communication methods with parents. Furthermore, one-on-one informal interactions (90.0 percent), followed by regular team members (81.9 percent) and school visits (81.9 percent) supported clear communication between team members. However, because of the multiple sites, there was a realization that face-to-face communication was not always possible, and therefore, the team used other means of communication through email and GoogleDocs. But more than the method of communication, some survey participants stressed the importance of open and honest communications, where team members worked together to develop ideas and solve issues, and regular communications, and discussed how things are going. Even through this research project, some participants were exploring opportunities to improve collaboration and communication, and build relationships.

Related to coming together as a team, the majority of participants believed they worked well together (81.8 percent) and that collective wisdom was valued by team members (72.7 percent). Furthermore, participants believed they worked together to meet shared goals (72.7 percent) or to meet challenges or setbacks (72.7 percent). As well, a high percentage of the team believed they regularly tracked progress (81.8 percent). However, when asked if the “one team” created from the pilot project met each child’s/family’s needs in a coordinated way, only 36.4 percent of participants completing the survey agreed.

All of the participants are currently participating in a multidisciplinary team. The majority of survey respondents indicated they participated on a multidisciplinary team with another organization (90.0 percent), and a handful participated on a PUF/FSCD Common Approach with another organization (27.3 percent).

When asked how efficient the pilot project was compared to other multidisciplinary teams, responses varied. Sixty percent of participants indicated the pilot project was more efficient. Of the participants who participated on the PUF/FSCD Common Approach in another organization, 66.7 percent indicated it was more efficient, while 33.3 percent indicated with was the same.

The varied responses perhaps demonstrate that each multidisciplinary team may operate in a different manner, in different working cultures, and has different levels of experience. Some

participants realized through the pilot project the different sites had different ways of working, which requires flexibility and the need for relationship building and trust. This aligns with research by Atkinson et. Al. that different cultures and management between professionals and agencies can be challenging (2002 in Wall, p.190). That said, over the course of the research project, the team was still forming, and evolving even during the research process. An opportunity also exists to create a cultural transition plan/approach to introduce the PUF/FSCD Common Approach to new locations.

Challenges and opportunities for improvement emerged through this research project, many of which align with what the literature review indicated are challenges for multidisciplinary teams. For example, the literature revealed time and resources is required to develop working relationships. In this research project, time was identified as “the most precious resource”, and more time was required upfront to build relationships. As well, changing roles and responsibilities along with potential overlap was identified in the literature review. Both teams were involved in a new way of working, which included potential overlap of work (family training sessions, meeting with parents) – which has the potential to duplicate functions, or result in work not being pursued because of unclear roles and expectations. The literature review also revealed that collecting outcome data may also be a challenge. Through the pilot project, the need for clearly communicated processes and expectations around data monitoring was identified.

Lack of team processes with shared goals and regularly scheduled meetings was also identified in the literature review, however, the PUF/FSCD Common Approach in Waverley School/Hillview School did have goals through the ISPP, and team meetings, although sub goals may have existed outside of the plan. Suggestions were made to have multiple levels of meetings. First, including all team members in both the Specialized Services and Early Education meetings – including with the family. However, a balance, consideration is the large size and number of teams for each family that adds time and complexity. The second level of meetings includes those with specialists. Third, conversation through GoogleDocs. An opportunity exists to potentially include *all participants* in the PUF/FSCD Common Approach to gather together to share ideas. Other challenges related to processes, is clearly defined expectations, reports, and timing are in place for both the Early Education PUF Program, and FSCD Specialized Services program, and, other than with the ISPP, are asynchronous. While the team is exploring opportunities to bring the timelines closer together, these are system concerns that could contribute to increased efficiencies with the PUF/FSCD Common Approach.

While the PUF/FSCD Common Approach created “one plan, one team” with children and families who selected, Waverley School’s Specialized Services program *and* Hillview School’ Early Education program, both teams still worked with other service providers. For example, Waverley School worked with the Early Education program in Waverley School, and Hillview School worked with other Specialized Services providers selected by the

parents. This aligns with the literature review that there is difficulty in coordinating multiple service providers. Furthermore, the Specialized Services team works with different Early Education teams, depending on the placement of children. Participants indicated that placing the children in the same classroom or time schedules could increase efficiencies and meeting times. Classroom placements, do, however, consider several factors including children interactions.

The challenges faced by the PUF/FSCD Common Approach in Waverley School/Hillview School are typical of multidisciplinary teams. As well, the pilot project integrated or is exploring, several best practices that the literature review indicated supports team functioning. The pilot project included common goals, identified as a way to help the team function well. As well, the team is exploring communications and clear roles and responsibilities, and other practices the literature review indicates supports team development. Furthermore, staff training, coordinated Professional Development, and sharing of best practices were mentioned by this team.

Another area the team could explore that is identified in the literature review is exploring how the professionals complement each other. This could include identifying the roles and responsibilities, along with workplace culture, in each of the settings prior to bringing the teams together.

### **5.3 Summary**

The PUF/FSCD Common Approach in Waverley School/Hillview School reflects several best practices in early childhood interventions for children with disabilities and their families. Furthermore, as a first year of the pilot project, the team experienced several challenges related to multidisciplinary teams and proposed solutions related to what the literature review indicates needs to be in place for a well-functioning team. For example, the team is developing roles and responsibilities, and clearly articulating processes. Most importantly, communication and collaboration will be the “glue” that holds the initiative together. As well, aligned system processes could potentially create efficiencies for the initiative, as well as the way the team is structured physically and organizationally.

From the team’s perspective, the PUF/FSCD Common Approach in Waverley School/Hillview School *has* provided positive coordinated outcomes and efficiencies *for the child, parents, and families*. However, the process has required a lot of time and intentional effort by the team. As a team still forming, a future assessment will more fully define the effectiveness and efficiency of the common approach.

## 6.0 Options to Consider and Recommendations

### 6.1 Introduction

The purpose of this section is to present options for a proposed PUF/FSCD Common Approach service delivery model. The criterion used to assess the service delivery models include team functioning concepts from the literature review and as observed by participants; research questions related to one plan, one team, efficiencies for family, team; and additional considerations such as time to implement the option, the District's scope to implement an option, and potential cost efficiencies.

The four options are identified and discussed in turn:

- Option 1: Status Quo: Continue with the pilot project, while introducing incremental improvements to the PUF/FSCD Common Approach at Waverley School/Hillview School and evaluate a year from now
- Option 2: Foster One Plan, One Team, One Site Approach to PUF/FSCD Common Approach
- Option 3: Create a Core Team of both Early Education and Specialized Services in One Location to Serve Multiple Locations
- Option 4: Government of Alberta and Edmonton Public Schools to Further Align the Two Programs to Create Further Efficiencies

### 6.2 Options to Consider

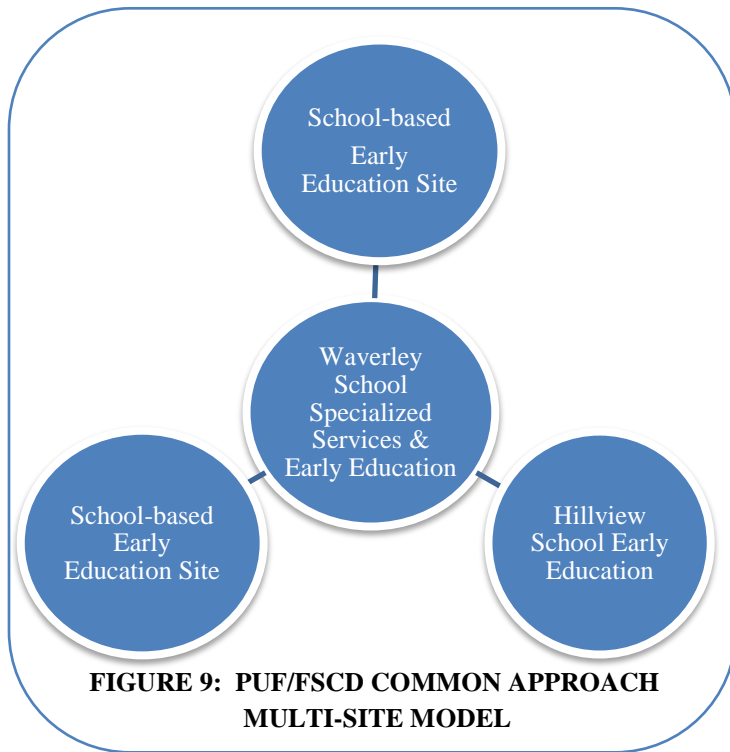
#### **6.2.1 OPTION 1: INTRODUCING INCREMENTAL IMPROVEMENTS TO THE PUF/FSCD COMMON APPROACH IN WAVERLEY SCHOOL/HILLVIEW SCHOOL AND EVALUATE THE APPROACH A YEAR FROM NOW.**

This option continues to explore one team around the family from two sites. The PUF/FSCD Common Approach was put together quickly, with team members drawing from past experiences and “figuring things out” along the way. Even during this research project, the team was still coming together, defining itself, and identifying ways to improve, including:

- creating clearly defined roles, responsibilities, processes and expectations;
- clearly defining meeting times at the beginning of the year, including classroom observations;
- aligning the timing of plans and reports as close as possible; taking the time to build team relationships at the beginning of the year.

This option includes the improvements suggested by the research participants and supports coordination, collaboration, and communication, best practices identified in the literature review. Vital in the approach is the co-creation of materials between the Specialized

Services team members and Early Education team members inform the development of the materials so team members information and communication needs are addressed.



**FIGURE 9: PUF/FSCD COMMON APPROACH MULTI-SITE MODEL**

Some participants also identified further ways to align the two processes, including 1) Family-Oriented Programming Sessions and Parent Training Sessions; and, 2) Transition Plans. This option would include aligning these two sessions where possible, and exploring the alignment of Transition Plans.

With two different sites, the team identified the need for more intentional collaboration. As such, this option would include exploring the best staff for the core team, and provide the opportunity for school-based staff to also participate in home

visits as necessary to support the family and enable all team members to get the information they need to get a holistic picture of the child. As well, setting up deliberate times for specialists to communicate with one another and organizing Personal Development Training with team members, a best practice identified in the literature review to support team functioning.

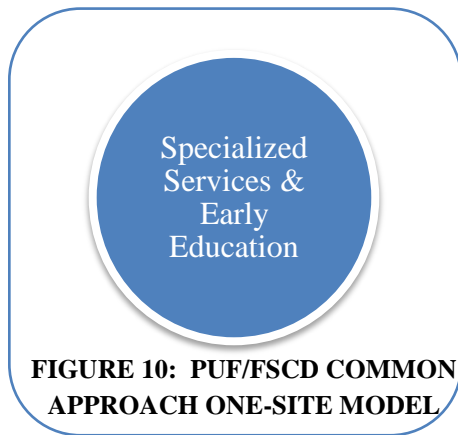
Should this approach continue beyond the pilot project, a culture change management strategy/plan would outline an approach to support gradual transition of staff and schools into the PUF/FSCD Common Approach.

This approach introduces incremental change, integrating key ideas shared by various team members that align with best practices. Potential challenges may still exist with the approach continuing to be labour intensive for the team. However, an evaluation after the established protocols are in place will better inform the ever-evolving approach.

### **6.2.2 OPTION 2: FOSTER ONE PLAN, ONE TEAM, ONE SITE APPROACH TO PUF/FSCD COMMON APPROACH**

The Waverley School Specialized Services team has significant experience with one-site PUF/FSCD Common Approach and serves as a successful model that could be delivered across the District. The Early Education and Specialized Services teams in this school have

developed a culture of working together to provide the Common Approach to families who choose both the Early Education and Specialized Services programs in Waverley School. The opportunity exists to replicate a one site model throughout the District. The approach sets up structures intended to foster communication and collaboration between team members, best practices identified in the literature review.



Based on conversations with the Government of Alberta, one plan, one team, and one site approach seems to be successful when compared to multiple site service delivery. As well, an observation was shared during the research project about the possibility of Hillview staff also providing services similar to the Specialized Services team. However, there was also the observation that time could be an issue if the school-based team provided both services, and more staff would likely be required.

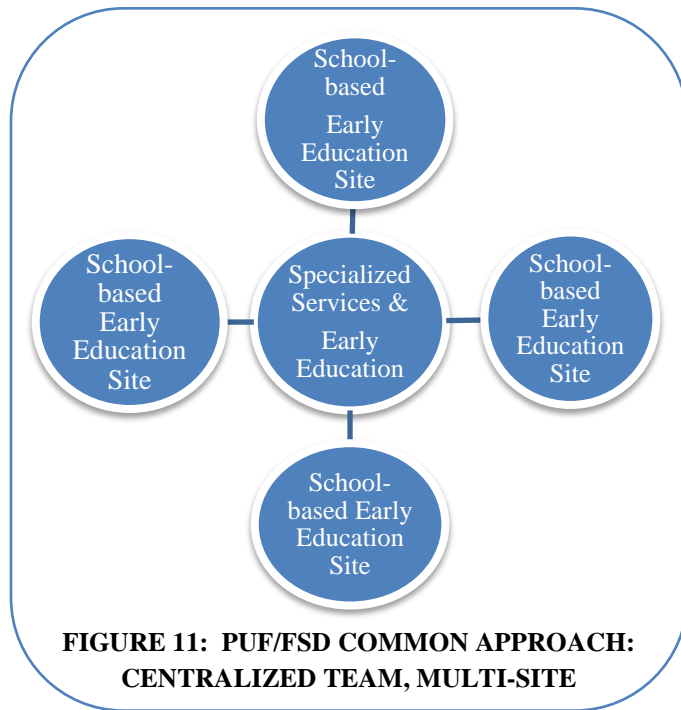
Another complication is that *parents* ultimately choose both the Early Education *and* Specialized Services providers, and parents may choose two different organizations, thereby limiting the one site option.

However, budget constraints related to staff may be a consideration when localizing Early Education and Specialized Services to serve only one site. With potential budget considerations, new ways and methods of delivering services are being explored. As well, only two schools in the District currently deliver Specialized Services programming, requiring further training on Specialized Services and the Common Approach. Furthermore, professional staff may be overwhelmed with the workload, and the approach would change job descriptions, and would require further exploration if pursued.

### **6.2.3 OPTION 3: CREATE A CORE TEAM OF BOTH EARLY EDUCATION AND SPECIALIZED SERVICES IN ONE LOCATION TO SERVE MULTIPLE LOCATIONS**

Another option is to bring together Early Education team members and Specialized Services team members together in one site as part of one overarching team to serve multiple locations. This approach aligns with the antidotal evidence in the research project that one site is the best approach for the PUF/FSCD Common Approach. This option creates structures that foster team development by enabling team members to communicate “on the fly” through shared space and enables cross-training to increase understanding of what various team members do and provides opportunities for specialists to expand career options by seeing variations of their profession. This approach “builds in structures” to support coordination, collaboration, communication, and training, all best practices identified in the literature review. Furthermore, if the PUF/FSCD Common Approach expands through the City of Edmonton – these core regional teams could further exchange ideas through a

District-wide meeting of core teams. However, this approach would take significant amount of time to build.



**FIGURE 11: PUF/FSD COMMON APPROACH: CENTRALIZED TEAM, MULTI-SITE**

The approach also aligns with the Early Years model with a central school and team servicing satellite Early Learning Sites. However, both schools in this pilot project (Waverley School and Hillview School) are in different school groupings, or catchments, that might make collaboration difficult. Furthermore, it might be difficult to find space to house a large team, and will likely increase coordination of team members. Another consideration would be if the team would be staff associated with a school, or regional/central staff.

**6.2.4 OPTION 4: THE GOVERNMENT OF ALBERTA AND EDMONTON PUBLIC SCHOOLS TO FURTHER ALIGN THE TWO PROGRAMS TO CREATE FURTHER EFFICIENCIES.**

The PUF/FSCD Common Approach brings together one team under one plan. However, there continues to be differences in definitions, reports, and requirements under each program. The potential exists to fundamentally align the two programs to support structural efficiencies. Activities that could be undertaken include:

- create a coordinating body of provincial staff and service providers, or utilize existing regional bodies, to further discuss best practices, and opportunities to improve the PUF/FSCD Common Approach;
- identify areas of synergy, areas where programs may be working at cross-purposes and potential areas of realignment:
  - map out and compare key processes, timelines for both programs;
  - identify key reporting processes and timelines for both programs;
  - definitions of programs.
- continue to identify best practices from various PUF/FSCD Common Approach service providers;
- explore the evolution of the PUF/FSCD Common Approach and successes achieved since the pilot project evaluation;

- create a provincial process map that providers may choose to use for the PUF/FSCD Common Approach.

By further aligning the two programs, additional structural efficiencies would be created. Furthermore, mapping out processes aligns with literature on the importance of clearly defined processes. Both programs are complementary but have different mandates. However, changes would require significant amount of time, consultation, and political will. As well, various organizations have different approaches and processes.

#### 6.2.4 COMPARISON OF OPTIONS

The following *Table 6: Comparing Options for PUF/FSCD Common Approach in Waverley School/Hillview School* shows the various options based on the criteria outlined at the beginning of this chapter. In the table, an “X” denotes the likelihood the criteria will be satisfied, and is based on the intent of the options, and comments made during the research.

**TABLE 6: COMPARING OPTIONS FOR PUF/FSCD COMMON APPROACH IN WAVERLEY SCHOOL/HILLVIEW SCHOOL**

Criteria	Option 1	Option 2	Option 3	Option 4
Team Functioning				
Common goals	X	X	X	X
Frequent communication between team members	X	X	X	
Clearly defined processes	X			X
Clearly defined roles and responsibilities	X			
Professionals complement each other	X	X	X	
Clarity on coordinating supports	X	X		
Stronger relationships (collaboration)	X	X	X	
Training	X		X	
Aligned system processes	X			X
Structures		X	X	X
Research Questions				
One plan	X	X	X	X
One team	X	X	X	X
Efficiencies for family	X	X	tbd	
Efficiencies for team	tbd	X	tbd	X
Other				
Time to implement is comparatively limited	X			
Within scope to change	X	X	X	
Potential cost efficiencies	X		X	

From the options presented, the first option is currently the most viable as it satisfies the most criteria and takes less time to implement compared to the other options. As the pilot is currently underway, it is within the scope of the District to change. Currently, there are opportunities to improve benefits to the team and support team functioning – an evaluation of changes to the pilot project a year from now will provide a stronger indication of the benefits of the pilot project.

### **6.3 Recommendations**

The PUF/FSCD Common Approach Waverley School/Hillview School pilot project delivered one plan, one team, over two sites. As a newly formed initiative and team, and the team is still forming, the recommendation for the pilot project is Option 1:

#### **Introduce incremental improvements to the PUF/FSCD Common Approach in Waverley School/Hillview School and Evaluate the Approach a year from now.**

1. Create/communicate well-defined responsibilities, processes, and expectations, including:
  - PUF/FSCD Common Approach processes, alignment, and overlap;
  - roles, responsibilities, and expectations for each team member;
  - process/forum to address disagreements, continuous improvement ideas, or sharing of best practices;
  - expectations around classroom visits/observations;
  - data collection and monitoring processes;
  - clearly defined meeting times between team members and with the family;
  - organize opportunities for joint training sessions between team members.
2. Continue to identify opportunities to create alignment between the PUF/FSCD Common Approach pilot project:
  - continue to explore the alignment of plans and reports as close as possible;
  - explore the alignment of Family-Oriented Programming Sessions and Parent Training Sessions;
  - explore the alignment of Transition Plans, creating options when it makes sense to bring the Transition Plans together or keep them apart;
  - express concerns with the timing of the PUF/FSCD Common Approach with appropriate decision-makers.
3. Develop a culture change management strategy to support gradual transition of staff and schools in the PUF/FSCD Common Approach.
4. Evaluate the impact of the incremental changes in Spring 2017.

**Rationale**

Option 1 implements observations made by research participants, addresses the challenges faced by the team, and aligns with best practices in the literature review, such as clearly defined processes, roles and responsibilities, clearer communication, stronger collaboration, and training for team members.

There is a significant amount of agreement from PUF/FSCD Common Approach participants that the PUF/FSCD Common Approach meets the priorities for families in a coordinated way. However, the majority of participants do not see the two teams forming the “one team” for the PUF/FSCD Common Approach met the child’s/family’s needs in a coordinated way. As well, when comparing the approach to other multidisciplinary teams, the participants are almost divided whether the approach is more efficient.

The potential challenge may be the PUF/FSCD Common Approach teams are in the process of forming, and workplace culture and processes are still being developed. These recommendations provide an opportunity to explore the team’s observations for continuous improvement, create more efficiencies as they make sense, and create materials to prepare future schools to enter the PUF/FSCD Common Approach, should the District choose to continue the approach after the pilot project. The evaluation at the end of the second year of the pilot will help assess if coordination efforts and efficiencies for the team have improved with clearer processes. The recommendations also focus on incremental improvement and recommendations that are within the scope of the District.

An opportunity may exist to explore Option 3 in the future to structurally create one team for the PUF/FSCD Common Approach.

## 7.0 Conclusion

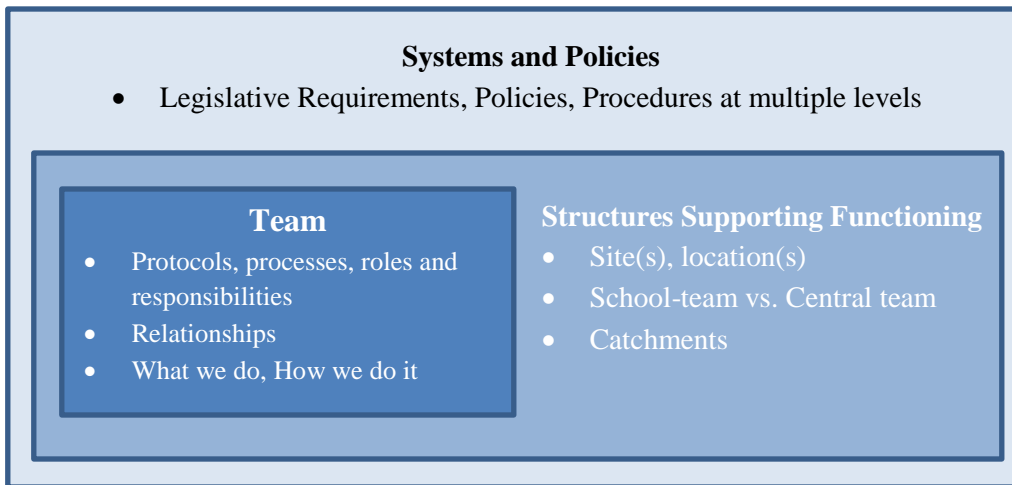
The PUF/FSCD Common Approach is complex, integrating concepts and best practices that include inclusive school, family-centred approaches, and natural settings and various. In complex settings, the literature review reveals multidisciplinary teams are used to deliver programs and services in complex settings that require perspectives from different fields of study and expertise. Furthermore, as indicated by Sheldon and Rush, the issue is “is not *if* teams should be used, but *how* they can be configured to work effectively” (p.175).

The PUF/FSCD Common Approach is such an initiative that requires breadth and depth of expertise ranging from education to health experts and behavioural consultants. The focus of the PUF/FSCD Common Approach is “one plan, one team”, and making plans and services streamlined for parents. This is aligned with practice on focusing on family choice and priorities (Turnball, Turbiville, Turnball, p.640). The majority of team members from the PUF/FSCD Common Approach in Waverley School/Hillview School agreed the pilot project reflects parents’ priorities and individualized services. There are seemingly notable benefits for the family through the desire to provide seamless service delivery to children and their family through a “one-stop shop” for families. At the same time, as a new team in a new way of doing things, opportunities exist for improvement. Through this research project, participants identified opportunities for improvement and strategies moving forward. An opportunity also exists to explore cost-efficiencies of the initiative.

Coordination is significant, as demonstrated in the literature review through approaches such as a key-worker system/primary coach approach (Wall, p.171; Sheldon and Rush, p. 175), and models of service coordination (Dunst and Bruder, p.161-162). In this research project, team members repeatedly emphasized the importance of collaboration and communication – key components of coordination.

A number of factors seemingly influence coordination – communication and collaboration: clearly defined protocols and processes; structures that support functioning, such as the way teams are physically and organizationally placed; aligned systems and policies.

**FIGURE 12: FACTORS THAT INFLUENCE COORDINATION: COMMUNICATION AND COLLABORATION**



Furthermore, relationships influenced by past experiences and expectations seemingly impact coordination – communication and collaboration.

While significant research likely exists on teams, this study is limited in that only a preliminary literature review was done on multidisciplinary teams given the scope of the project. In-depth research in each of these areas would have better influenced this research project and recommendations for team functioning. This research project focused in-depth on the PUF/FSCD Common Approach in Waverley School/Hillview School (only) and on staff and provincial perspective. With time, comparing the approach with different sites, different models (number of plans, teams, sites; service delivery models), and the pilot project over time could better explore the benefit and efficiencies of the PUF/FSCD Common Approach, and potential ways to support teams transitioning to new settings and ways of working together. Furthermore, in future follow-up with the project, seeking parent and other stakeholder perspectives would have a more well-rounded review of the results as would assessing the outcomes of the pilot project and conducting interviews with more staff. Another area of interest could be exploring in more depth team members’ experiences with multidisciplinary teams and the impact of these experiences and expectations on the PUF/FSCD Common Approach.

The PUF/FSCD Common Approach in Waverley School/Hillview School spearheaded a new initiative within Edmonton Public Schools, integrating current research and best practices in early childhood intervention. The team experienced challenges as the literature review indicated would be expected, and is pursuing opportunities that the literature review indicates supports team functioning. With potential recommendations in place, the opportunity exists to further assess the PUF/FSCD Common Approach in Waverley School/Hillview School. An encouraging opportunity exists to also explore additional foundational elements (structures, systems, and policies) to support team functioning.

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## Appendix A: Focus Group Research Questions

The following is the agenda for the focus group discussions that took place on April 19, 2016.

### Agenda

#### Purpose:

- To identify the initiative structure (logic model) to implement the PUF/FSCD Common Approach in Waverley School.
- To reflect on the implementation of the PUF/FSCD Common Approach in Waverley School (strengths, challenges).

#### 1. Welcome and Introduction (20 minutes)

- Natalie Prytuluk, Early Years Supervisor, Edmonton Public Schools
- Sherelyn Caderma, Graduate Student, University of Victoria; Strategic Planner, Edmonton Public Schools

#### 2. Logic Model (1 hour, 30 minutes)

The focus group will explore concepts/questions related to a logic model. The purpose of a logic model is to show the relationship between the resources used for the pilot project (e.g. staff, classroom, equipment); the activities used to deliver the pilot project; what is delivered/produced from the pilot project; and what is the intended outcome/impact of the pilot project.

Participants will be asked the following questions:

Inputs	Activities	Outputs	Outcomes
What resources are required/used to deliver the PUF/FSCD Common Approach?	What are the key activities of the PUF/FSCD Common Approach pilot project?	What is delivered/produced through the PUF/FSCD Common Approach?	What are the desired outcomes/impact of the PUF/FSCD Common Approach?

#### Break (15 minutes)

#### 3. Implementation Questions (45 minutes)

Participants will be asked to reflect on the following questions:

- What are the strengths of the process used to implement the PUF/FSCD Common Approach?
- What are ways this team has evolved through the process?
- What are the barriers to implement the PUF/FSCD Common Approach?
- What are opportunities to improve the PUF/FSCD Common Approach?

#### 5. Concluding Remarks, Questions and Next Steps (10 minutes)

## Appendix B: Survey Instrument

The following is the survey used for this research project.

### PUF/FSCD Common Approach

Waverley School and Hillview School

#### Introduction

The purpose of this survey is to look at the Program Unit Funding (PUF)/Family Support for Children with Disabilities (FSCD) Common Approach pilot project in Waverley School/Hillview School. The information collected from the survey will be used to inform the development of a model that may be adapted in other Edmonton Public School early years locations. Participation in this survey is completely voluntary, and you may choose to withdraw at any time without any consequences or explanation.

The online survey in FluidSurveys is expected to take between 15 to 30 minutes to complete. Information collected through this survey will be anonymous and confidential. Your confidentiality and the confidentiality of the data will be protected as names will not be collected in the survey, and the survey results will be summarized.

The results from this survey will be used for a University of Victoria Master of Public Administration Capstone Project Report; and the overall results will be shared with Edmonton Public Schools and research participants (focus group and other participants as requested). The survey will be open until Wednesday, May 4, 2016 @ 4:30 pm.

#### Coordinated Services: One Plan, One Team

The PUF/FSCD Common Approach was created to provide coordinated services through one team, one plan, where team members work together to identify strategies. For the purpose of the questions below, team is defined as parents, the school-based team members and the specialized services team members.

#### One Plan

To what extent do you agree or disagree to the following statements:

	Strongly Agree	Agree	Disagree	Strongly Disagree
All members of the team worked together to develop the Individualized Service Program Plan (ISPP) for each child and his/her family.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Individualized Service Program Plan (ISPP) reflects the priorities of the family.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Individualized Service Program Plan (ISPP) emphasizes individual services for each child and his/her family.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Roles and responsibilities are clearly defined in the Individualized Service Program Plan (ISPP).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
“One Plan” meets each child's/family's needs in a coordinated way.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## One Team

To what extent do you agree or disagree to the following statements:

	Strongly Agree	Agree	Disagree	Strongly Disagree
“One Team” meets each child's/family's needs in a coordinated way.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Have you worked with a multi-disciplinary team before participating on the PUF/FSCD Common Approach in Waverley School/Hillview School?

- Yes  
 No

	A lot more efficient	Somewhat more efficient	About the same	Somewhat less efficient	A lot less efficient
If yes, in your perspective, how efficient is the PUF/FSCD Common Approach in Waverley School/Hillview School in providing coordinated services to the child and his or her family compared to the other multi-disciplinary teams?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

In what way(s) is the PUF/FSCD Common Approach in Waverley School/Hillview School more or less efficient?

Have you participated in a PUF/FSCD Common Approach with another organization?

- Yes  
 No

	A lot more efficient	Somewhat more efficient	About the same	Somewhat less efficient	A lot less efficient
If yes, in your perspective, how efficient is the PUF/FSCD Common Approach in Waverley School/Hillview School in providing coordinated services to the child and his or her family compared to the other organization?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

In what way(s) is the PUF/FSCD Common Approach in Waverley School/Hillview School more or less efficient?

**Collaboration**

This section is about collaboration. For the purpose of the questions below, team is defined as parents, the school-based team members and the specialized services team members.

To what extent do you agree or disagree to the following statements:

	Strongly Agree	Agree	Disagree	Strongly Disagree
Our team works well together.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Team members work together to meet shared goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Team members work together to meet challenges or setbacks.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The team regularly tracks progress and adapts plans as needed.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Collective wisdom is valued by team members.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

What are ways school-based team members and specialized services team members collaborate with parents of children in the PUF/FSCD Common Approach pilot project?

What are ways school-based team members and specialized services team members collaborate with each other?

In your opinion, which methods are the most effective for collaboration?

**Communication**

This section is about communications. For the purpose of the questions below, team is defined as parents, the school-based team members and the specialized services team members.

To what extent do you agree or disagree to the following statement:

	Strongly Agree	Agree	Disagree	Strongly Disagree
There is good communication among team members including the family.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

To what extent do you believe each of the following activities support clear communication between parents and school-based team members and specialized services team members:

	Very Strong	Strong	Weak	Very Weak	Not Applicable
One plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
School newsletter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Classroom newsletter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teacher communication books to describe classroom activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Phone calls with parents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Consultations and/or home visits by school-based team members and/or specialized services team members	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SchoolZone	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

To what extent do you believe the following activities support clear communications between the school-based team members and specialized services team members?

	Very Strong	Strong	Weak	Very Weak	Not Applicable
One plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regular team meetings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
One-on-one information interactions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
School visits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

What are other ways the school-based members and specialized services team members communicate with parents of children in the PUF/FSCD Common Approach pilot project?

What are other ways school-based team members and specialized services team members communicate with each other?

Which communication methods are the most effective? Why?

### **Observations of the of the PUF/FSCD Common Approach**

What advice would you give to other teams implementing a PUF/FSCD Common Approach?

Do you have any other comments or observations about the PUF/FSCD Common Approach?

## **Appendix C: Semi-Structured Interview Questions**

This section provides semi-structured questions that guided the interviews with research participants. The semi-structured interviews were also used to clarify questions emerging from the focus group and/or survey, and evolved through the process.

### **Semi-structured Interview Questions for Hillview School/Waverley School Participants**

1. What is the process to bring a child/family through the PUF/FSCD Common Approach?  
What did your year look like?
2. What was different this year compared to previous years?
3. what would you suggest to keep/change?
4. What efficiencies do you see from this process? Multidisciplinary team? Family? School?
5. Reflections on the logic model
6. Other comments or insights about the Common Approach?

### **Semi-structured Interview Questions for Government of Alberta**

1. What is the history of the PUF/FSCD Common Approach?
2. What are the key steps of the PUF/FSCD Common Approach process?
3. What do you see are the strengths of the PUF/FSCD Common Approach?
4. What do you see are challenges with the PUF/FSCD Common Approach?
5. What do you see are characteristics of successful PUF/FSCD Common Approaches?

## **Appendix D: Focus Group Discussion Logic Model Detail**

This appendix provides detailed information for the logic model created based on the focus group conversation on April 19, 2016.

### **Inputs**

The inputs were identified during the focus group through a large brainstorming session. The inputs can be placed with seven categories: 1) time; 2) clients; 3) contracts and agreements; 4) funding; 5) initiative processes and documents; 6) classroom and equipment; and 7) staff. External staff from District central decision units, provincial supports, and external community partners were also identified as contributing to the initiative.

#### ***Time***

When asked what resources are required for the initiative, the focus group identified time first. One participant indicated it is “the most precious resource.” Throughout the focus group time was identified as necessary for the team to gather together to collaborate and for staff personal training and development to occur.

#### ***Money and Funding***

The focus group identified two sources of funding: Program Unit Funding (PUF) and FSCD Specialized Services (SS) Funding. In addition to funding, money was identified as required to purchase equipment and toys for the initiative.

#### ***Family***

The family(ies) participating in the PUF/FSCD Common Approach were also identified by participants as inputs to the initiative.

#### ***Staff/Multi-disciplinary Team***

The focus group identified staff and the multi-disciplinary team as inputs. Staff identified included: teachers; FSCD and PUF Coordinators; Occupational Therapists; Speech Language Pathologists; Physical Therapists; Educational Assistants; Speech Language Pathologist Assistants; and, Behavioural Consultants. The focus group indicated in some cases, there were two specialists. The Family Liaisons/Family Support Workers were also identified as potential resources. While not part of this pilot project, these individuals could function as a primary coach for the family. School leadership from schools participating on the initiative (principals and assistant principals) were identified as well.

#### ***Processes/Tools/Documentation***

The focus group identified processes and criteria to identify the family; roles and responsibilities; and tools to conduct assessments as key inputs to the initiative. Some of the

inputs were/will be created this year, for example – a communications brochure to describe the program – and will be inputs for future years.

### ***School/Classrooms***

The focus group discussed environments for learning, and “classrooms [that] ‘fit’ in the rest of the school” as important inputs. One participant explained, the “schools are set up differently than other schools, preschools, or day cares with specialized equipment such as small toilets and chairs”. Toys were identified as inputs to help “children to behave more like typically developing children.”

### ***Technology***

The focus group identified several technology inputs such as computers, GoogleDocs, and email. I pads were also identified as being used for video modeling and video feedback for parents.

### ***Vehicles and Mileage***

The focus group identified vehicles and mileage as a small, but necessary input for the initiative.

### ***Staff training and professional development materials***

One participant reflected on personal experience in the Common Approach and the importance of training to learn about specialized to make it more effective. Inputs identified by the focus group included materials to support training and development and a professional development coordinator.

### ***External Supports (District, Provincial, Community Partners)***

The focus group identified external supports to the initiative, including District central supports, such as the Early Years Supervisor, Inclusive Learning, Budget Services, District Support Services, Transportation Services, and the Planning Department. As an example of what some of these departments do, Budget Services coordinates contracts and District Support Services to help families navigate processes and help staff with complex cases. The FSCD Caseworker from the provincial government and community partners (Glenrose Rehabilitation Hospital, doctors and pediatricians, Alberta Aids to Daily Living) were identified as supports.

## **Activities**

The activities were identified during the focus group using a period of individual reflection followed by large group discussion. The activities were fine-tuned during the interview process to support groupings of activities.

The activities can be grouped into two large categories: 1) coordination and team development; and, 2) program delivery.

### ***Coordination and Team Development***

The activities discussed by the focus group related to coordination and team development can be grouped as: 1) ISPP development and reporting; 2) coordination; 3) communication and reporting; 4) monitoring and reporting; 5) professional development and training.

#### ***ISPP Development and Reporting***

The focus group identified document writing as a key activity, including creating the ISPP document, final report and proposed report. The interview process supplemented the focus group conversations and identified several meetings with the team and/or family as part of the interview process.

#### ***Coordination***

The focus group identified key coordination activities including, coordinating staff under both the PUF and SS programs, organizing and participating on team meetings, and coordinating/collaborating services such as screens and food checklists for consistency.

#### ***Communication and Collaboration***

Communication and collaboration were the most commonly mentioned activities identified during the focus group. Examples of activities identified during the focus group included: communication/collaboration within the classroom and between the teams and the family on how to achieve goals and objectives; communication of observations and concerns within the team through a variety of mechanisms (e.g. GoogleDoc, emails, phone calls, team meetings); communication with the family; and sharing weekly goals and progress; meetings with team members to learn new techniques and share with families. The focus group also identified that communication also occurs with the Inclusive Learning department.

#### ***Monitoring and Reporting***

The focus group identified several monitoring and reporting activities: document progress on weekly goals and share information through meetings and GoogleDocs; communicate observations and concerns within the team through a variety of communication modes such as GoogleDocs, emails, phone calls, and family; and,

monitor progress by comparing the start, progress, and growth that occurred through the year.

### ***Professional Development and Training***

The focus group identified professional development and training as another activity for the initiative. The focus group discussed the importance of opportunities for team members to share perspectives, best practices, and new techniques that may be shared with the family.

### ***Program Delivery***

The activities related to program delivery can be divided into three categories: 1) school, classroom, initiative preparation; 2) Program Unit Funding (PUF); 3) FSCD Specialized Services.

#### ***School, Classroom, and Initiative Preparation***

The focus group talked about activities that support the classroom: create an environment in the school and classroom that is welcoming for the child; set classrooms that are conducive to the learning needs of the child; identify classroom groupings and children for each class; and, work with the bus driver and transportation department to ensure safe transportation of the child to and from school.

#### ***Program Unit Funding (PUF) programming***

The focus group identified several activities related to PUF. The activities were categorized and clarified during the interview process. Activities related to the PUF program included: conduct assessments to obtain funding and preparing the application for funding on behalf of the family; provide classroom instruction; implement strategies in the classroom; provide information on classroom progress/consultation; deliver Family-Oriented Programming sessions; and, support families to transition beyond the initiative.

#### ***FSCD Specialized Services programming***

The focus group identified several activities related to Specialized Services. The activities were categories and supplemented during the interview process. Activities identified included: conducting intake meetings and Routines Based Interviews with families to identify priority areas and goals; create an ecomap of the families' network and support systems; deliver parent sessions and Intensive Programming; accompany families on community outings; help families with networking and connecting to other resources as required; write specific FSCD reporting requirements; and, support families to transition beyond the initiative.

## **Outputs**

The inputs were identified during the focus group through a large brainstorming session. The activities were fine-tuned during the interview process to support groupings of activities from the PUF program and SS program, or both programs combined.

### ***Individual Service Program Plan Documents***

The focus group identified several documents and reports related to the ISPP. The first document is the ISPP that identifies specific child/family objectives and roles and responsibilities for the objectives. The focus group also identified an update (mid-year) and year-end report multi-disciplinary report. As one participant indicated the year-end report is “one report with information on communications, self-help skills, motor skills, behaviour, parent learning and outcomes, continued areas of need...recommendations, and assessment results”. If the child is continuing in programming, a proposed report for the upcoming year will be created. A focus is “on what the parent has learned.”

### ***One Point of Contact***

The focus group identified as an output one point of contact for the parents. The interviews identified this individual as the primary coach that is identified as a result of the ISPP process.

### ***Team Meetings/Family Meetings***

The focus group identified coordinating/participating on team meetings as an activity. Through the interview process, participants identified six formal team and/or family meetings related to the ISPP.

### ***Team Communications***

The focus group identified communicate observations and share issues and concerns through GoogleDocs, email, and phone calls as activities. Frequency of communications is an output of these communications.

### ***Family Communications***

The focus group identified several communications modes to parents that included brochures, websites and newsletters. Specific to the PUF program are parent communications on SchoolZone and Daily Communications book. As well, specific to the Specialized Services program are home visit notes. The interviews provided an opportunity to clarify which communications methods were specific to each program component (PUF or SS).

### ***Progress Monitoring***

The focus group identified several data and measurement documents such as a monitoring progress document, measurement of impact, FSCD quality of life questionnaire, and FSCD outcomes questionnaire.

### ***Professional Development and Training Opportunities***

The focus group identified trained staff as an output in the initiative.

### ***One-time Outputs: Initiative Documents***

The focus group identified documents that were/will be developed for the initiative that will be one-time outputs that will become inputs in future years. Documents identified during the discussion were roles and responsibilities and a staff handbook, and a communications brochure describing the initiative.

### ***Program Unit Funding Outputs***

The outputs for the PUF program were identified during the focus group and fine-tuned during the interview process. Outputs included completed assessment tools by the teacher, Speech Language Pathologist, Occupational Therapist, and Physical Therapists; funding code for a child as a result of the assessments; hours of classroom instruction and specialist time; and family-oriented programming sessions.

### ***Specialized Services Outputs***

The outputs identified for the Specialized Services program were identified in the focus group and interview process, and fine-tuned during the interview process. Outputs identified include Routines Based Interview based on Robin McWilliams work to walk through a day with the family; an ecomap to identify the networks of a family; parent training sessions; community outings with the team and family; nominal quarterly report that identifies specialists time dedicated to each child; a quality of life questionnaire and FSCD outcomes questionnaire.

### ***Home Visits***

Common to both the PUF and SS program are home visits, which are delivered under the SS program

## **Outcomes**

The focus group identified six outcomes from the PUF/FSCD Common Approach: 1) consistency and efficiency across environments; 2) staff strengths and development; 3) positive child outcomes; 4) positive family outcomes; 5) celebrate success!!; and, 6) long-term goal of inclusivity.

### ***Consistency and Efficiency Across Environment***

The focus group identified several outcomes that address consistency and efficiency across environments. An intended outcome identified of the PUF/FSCD Common Approach is the increased holistic and cohesive services across the PUF [Hillview School] and Specialized Services [Waverley School] providers in a manner that makes it easier and less overwhelming for families. Part of the coordinated services includes increased strategies incorporated into both the classroom and home. Stronger relationships between the two sites was also identified as an important outcome.

### ***Staff Strengths and Development***

The focus group identified the importance of increased collaboration between team members and increased team member skills developed through collaboration, communication, and sharing of best practices. One participant indicated “as team members, we develop new skills as part of our collaboration.” An example shared by a participant was strengthened communication skills through the process.

### ***Positive Family Outcomes***

The focus group identified the importance of positive family outcomes. The family outcomes have several components, including parents increased understanding their child’s strengths, abilities, and needs and using the strategies they learn from the initiative to help their child in school, home, and community settings. Through this process, parents have increased ability to help their child develop and grow in a variety of settings, have an improved sense of well-being and mastery through their new knowledge and skills, and increased confidence in parenting and being with their child in the community. Another intended outcome of the initiative is that parents are strong advocates for the child when they no longer have support of the team, and have stronger informal and formal community networks and connections. The focus group discussed an improved sense of family well-being and stronger quality of life as a result of the initiative.

### ***Positive Child Outcomes***

The focus group discussed several aspects of positive child outcomes including increased growth, development and independence for children in the initiative. As one participant indicated, the initiative is about “looking at the child’s being overall more functional, happy, [and] better sense of well-being.” Outcomes for the child includes increased skill

development and functioning in a variety of areas that include communication, fine/gross motor skills, self-help, self-regulation, play and social skills, academic learning, emotional and physical well-being. Through the initiative, children have increased ability to meet their personal needs or ask for help when the need it. The focus group also identified further outcomes such as the child achieving goals identified for him/her, is reaching his/her potential, and has increased ability to function in a variety of contexts – home, school, and community.

***Celebrating success***

The importance of celebrating success was identified as an important outcome.

***Long-term vision: Inclusivity***

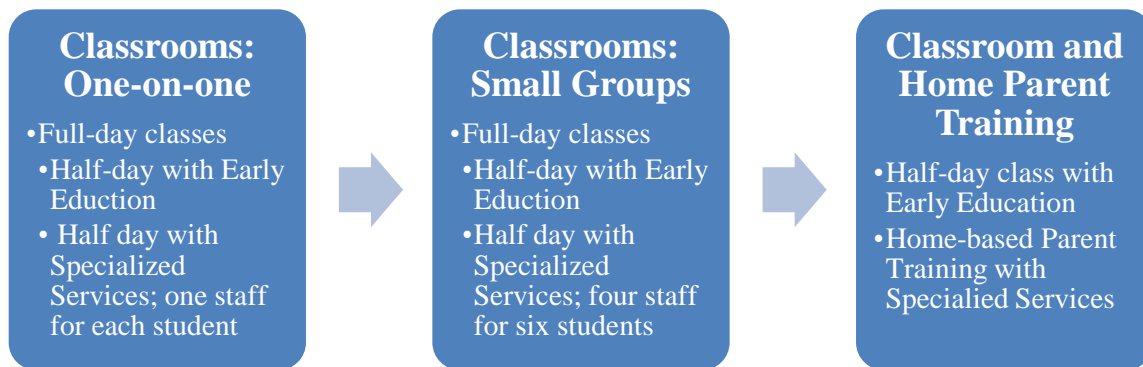
A few participants shared long-term visions when the child transitions beyond this initiative – with the child in inclusive education and the child and his/her family participate in inclusive community living through the skills provided in the initiative.

## Appendix E: History of Common Approach in Waverley School

The following section shows the history of the Common Approach in Waverley School described during the interview process.

The Common Approach in Waverley School evolved from classroom-based instruction for both the Early Education and Specialized Services programs over a full day to half-day Early Education Programming and Specialized Services home support to the families. More specifically, the Specialized Services program evolved from one-to-one interaction between staff and children in a classroom setting, to a small group setting with four staff for six children, to home support. *Figure 13: Transition of Common Approach in Waverley School* shows the changes over the years.

**FIGURE 13: TRANSITION OF COMMON APPROACH IN WAVERLEY SCHOOL**



Currently, small children who are part of the Specialized Services program may travel over an hour to receive Specialized Services at Waverley School; however, the District is shifting the approach from children coming to a centralized Specialized Services Site, to children receiving Specialized Services at their closest Early Education site.

The first year of the pilot project in the 2015-2016 school year involved the evolution of the common approach from one school site to multiple sites. The Early Education programming involved staff and students from Hillview School, with students qualified for the FSCD Specialized Services program. Staff for the Specialized Services program was from Waverley School.

## **Appendix F: PUF/FSCD Specialized Services Common Approach Framework**

The *Figure 14: PUF/FSCD Common Approach*, Government of Alberta depicts the vision, outcomes, guiding principles, and protocols of the PUF/FSCD Specialized Services Common Approach framework developed by the Government of Alberta (GoA, 2013b, p.2-4).

**FIGURE 14: PUF/FSCD COMMON APPROACH, GOVERNMENT OF ALBERTA**

<b>Vision</b>	<b>Families of children who qualify for PUF and FSCD Specialized Services will experience the right supports, at the right time to help build their capacity to promote their child’s development and create their full potential in their home, community and in early learning setting</b>
<b>Long-term Outcomes</b>	<ul style="list-style-type: none"> <li>• Children reach their full potential in their homes, communities and in early learning settings</li> <li>• Families are able to meet the needs of their child</li> <li>• The network of supports and services for preschool-aged children with disabilities and their families is strong, integrated and coordinated</li> <li>• Resources are used effectively and efficiently</li> </ul>
<b>Guiding Principles</b>	<ul style="list-style-type: none"> <li>• Child and family-centred</li> <li>• Collaboration and coordinated</li> <li>• Culturally responsive</li> <li>• Strengths-based and capacity-building</li> <li>• Responsive and flexible</li> <li>• Outcomes-based and focused on continuous improvement</li> <li>• Efficient and sustainable</li> </ul>
<b>Protocols</b>	<ul style="list-style-type: none"> <li>• Common entry approach</li> <li>• Family and child priority planning</li> <li>• Successful resource planning</li> <li>• Individualized service and program planning</li> <li>• Successful transition planning</li> </ul>

Government of Alberta. 2013. PUF/FSCD Specialized Services Common Approach Framework: Working Together for the Delivery of Programming and Services to Preschool Children with Disabilities.