

### PLC Meeting Minutes Template 2022-2023

<b>Team:</b>	OT/PT	<b>Assigned Topic:</b>	Student Specific Therapy and Safety Protocol Development
<b>Meeting Date:</b> 5/9/23			
<b>In Attendance:</b> Katy Baughman, Tracey Dearborn, Erin Jackson			
<b>Guiding Questions Discussion</b>			
<b>Review of previous meeting notes from Jess Yates</b>	<ul style="list-style-type: none"> <li>● Written notice stuff/Consent to test <ul style="list-style-type: none"> <li>○ To do - guidance for written notice relating to OT</li> <li>○ Has Jess talked to IEP coordinators about making sure more info as to why eval is warranted/concerns/what they are looking for goes into written notice yet? Or waiting for our guidance</li> </ul> </li> <li>● How PT and OT relate to academic and behavioral goals <ul style="list-style-type: none"> <li>○ Continue to explore how OT/PT goals directly relate to the needs (not just academic) and continue to work on clarifying wording of those goals <ul style="list-style-type: none"> <li>■ Ex: core strength to support upright posture to attend to academic tasks</li> <li>■ Ex: no academic needs per teacher but have fine motor delays that impact behavior which OT can help with!</li> </ul> </li> </ul> </li> </ul>		
<b>Therapy Thursdays</b>	<ul style="list-style-type: none"> <li>● Went well this year at KFS</li> <li>● How to grow to more schools next year <ul style="list-style-type: none"> <li>○ Add more contributors? Who?</li> <li>○ Age appropriate for each school?</li> </ul> </li> </ul>		
<b>Balance between tech and hands on</b>	<ul style="list-style-type: none"> <li>● Still unsure how to address this... so much is on technology that we would prefer to be hands on work... <ul style="list-style-type: none"> <li>○ How can we balance what has to be done on a screen?</li> <li>○ How can we get more outside time?</li> <li>○ How can we pull back some expectations to more age appropriate levels and does that improve behavior?</li> </ul> </li> </ul>		
<b>Eligibility</b>	<ul style="list-style-type: none"> <li>● PT eligibility information is done and will be shared with parents at start of services (at IEP meeting if PT services are added) or when there are questions</li> <li>● OT to begin developing eligibility guidance for OT as well</li> </ul>		
<b>Forms - OT</b>	<ul style="list-style-type: none"> <li>● Would like to refine templates so they are even more consistent for evals, eligibility, daily notes, teacher</li> </ul>		

	questionnaires, etc.
<b>Multidisciplinary Evals</b>	<ul style="list-style-type: none"> <li>• This is still something we really love especially for our lower kiddos... would like to continue the conversation around the benefits of multi-evals <ul style="list-style-type: none"> <li>○ Encourages more collaboration between evaluators</li> <li>○ Less for parents to shuffle through</li> <li>○ Time saving</li> <li>○ Still sectioned into separate disciplines but overall a more holistic approach</li> </ul> </li> </ul>
<b>Trainings</b>	<ul style="list-style-type: none"> <li>• Continues to be a huge time commitment for PT <ul style="list-style-type: none"> <li>○ Videos - need a way to sign off that they've signed off...Survey monkey?</li> <li>○ Are videos enough to call them "trained?"</li> <li>○ Fidelity checks haven't happened consistently - just no time</li> <li>○ Can we have time at the beginning of the school year to train everyone at once?</li> </ul> </li> <li>• Curriculum support/ideas <ul style="list-style-type: none"> <li>○ Ex: Handwriting without tears? How can OT be a resource without becoming a handwriting teacher?</li> </ul> </li> <li>• Special Ed (all disciplines) can provide resources to genEd <ul style="list-style-type: none"> <li>○ Can we try to have time during staff meetings? PD days? Something to bring the Therapy Thursday idea in person?</li> <li>○ Does this education build an understanding of why tech needs to be reduced and movement/hands on stuff needs to be increased... that would be the goal</li> <li>○ Could be a review of Therapy thursday slides or other tips. Could be more in depth topic we all address together, could also be a run down of what sped is working on</li> </ul> </li> </ul>

Action Steps			
Plan	Roles	Timeline	Strategies
Written notice/ Consent to test guidance		End of school year	
OT eligibility guidance		End of school year	Work on this first and it will lead to written notice stuff

OT forms		Ongoing	
Training ideas		End of school year	-Plan for PT safety trainings prior to start of school year - Talk to admin and other RSPs: can we present during PD days/staff meetings? Meet to determine what we want to talk about

<b>Team:</b>	OT/PT	<b>Assigned Topic:</b>	Student Specific Therapy and Safety Protocol Development
<b>Meeting Date:</b> 2/16/23			
<b>In Attendance:</b> Katy Baughman, Tracey Dearborn, Erin Jackson, Maggie McKenna			
<b>Guiding Questions Discussion</b>			
<b>Nearpod</b>	<ul style="list-style-type: none"> <li>• Maggie has started experimenting with this a little... it does not read aloud unless things are created as such, not as universal as advertised</li> <li>• Katy has concerns about all the technology we are pushing into curriculum - Tracey agrees</li> <li>• Maggie - we need to focus on using tech for output, but not so expensive. Looking at extensions to interface with google docs and there are a lot of them, also looking at CoWriter again</li> <li>• Maggie is researching more and hoping to share with Janice and IT team <ul style="list-style-type: none"> <li>○ Keyboarding is going to be important, OT doesn't teach keyboarding but it will be important for output</li> <li>○ Idea is to find 2 that provide some features that</li> </ul> </li> </ul>		

	<p>teachers are asking for and Janice is going to bring to Tricia</p> <ul style="list-style-type: none"> <li>• Maggie - next year grade 3-5 going to be using ipads attached to a keyboard so program needs to move to ipads</li> <li>• Maggie - Nearpod has the potential to help reach our kids who are in mainstream but aren't truly accessing <ul style="list-style-type: none"> <li>○ Her goal is to find a way to use nearpod in a way to reach those kids</li> </ul> </li> </ul>
<b>Keyboarding</b>	<ul style="list-style-type: none"> <li>• Tracey - not just a sped problem, no kids can type. If you want efficient writing, you have to build foundational skills, if you want efficient typers - you have to teach it!</li> <li>• Maggie - AI that is free that you type in your info and it will write the paper for you. Katy - loses all creativity and through processes.</li> <li>• Maggie - focus has transitioned a lot to technology</li> <li>• Do Tech integrators need to help teachers do this? This isn't fully OT job to teach all kids typing? In consultation with OT in general</li> <li>• Katy - has big feelings about tech and all the push for screen time, maybe we need to collaborate with tech in a way that uses our skill set and knowledge of development and their knowledge of tech and access</li> <li>• Tracey - our role in technology should be to get in, help set up, then pass it off to others working more consistently with them</li> </ul>
<b>Review of previous meeting notes from Jess Yates</b>	<ul style="list-style-type: none"> <li>• Katy - feels good about how protocols are working and being able to share them easily via google as reminders/refreshers</li> </ul>
<p><b>Permission to test for and written notice</b></p> <p>How can we get information we need on these documents prior to testing?</p>	<ul style="list-style-type: none"> <li>• Tracey - We shouldn't have to run after people to find out. This is also happening to Hilda</li> <li>• Tracey - We need to give others the language we want <ul style="list-style-type: none"> <li>○ Can you within the written notice - what are the concerns</li> <li>○ The language is on there, but we can't tell if the concern is global or more specific, why is an eval being requested?</li> </ul> </li> <li>• Tracey - Can we give Matt and Christine a cheat sheet of a</li> </ul>

	<p>list of specific things we would be looking for</p> <ul style="list-style-type: none"> <li>• Maggie - when I go to teacher/case manager she can gather more information</li> <li>• Other issue is the role of school-based OT/PT (ex: handwriting) especially in the case of moving to consultation if handwriting (or whatever skill) is not perfect</li> </ul>
<b>Therapy Thursdays</b>	<ul style="list-style-type: none"> <li>• Going really well at KFS - it's kind of like a tier 1</li> <li>• Bring to other schools? More age-appropriate topics</li> <li>• Maggie - "Whole Child" meeting at HBS <ul style="list-style-type: none"> <li>○ Pros and Cons are both there</li> <li>○ Scheduling is really tricky - can't go in once per week and expect to effect change</li> <li>○ Started thinking about push-in again, thinking about the schedule is an issue (the block schedule) <ul style="list-style-type: none"> <li>■ Problems are around teachers not following the blocks, blocks being too long for age groups (KFS)</li> </ul> </li> <li>○ Maybe the week alternating with guidance she can push into whole classrooms <ul style="list-style-type: none"> <li>■ Tracey - she finds this only works in self-contained programs and resource</li> </ul> </li> <li>○ Maggie - teaches underlying OT skills during cursive time after the teacher gives a lesson and they are working on it. This is in addition to the student's direct service time. This is an idea that she is thinking a lot about <ul style="list-style-type: none"> <li>■ Tracey - how is this different from teaching keyboarding not being our job</li> <li>■ Maggie - really it's teaching the teacher all the underlying components to handwriting. It's one visit, when they introduce cursive. She would rotate through classrooms each week. Also helps teachers understand our role and maybe clarifies what are appropriate referrals</li> </ul> </li> </ul> </li> <li>• Benefits to a weekly slide, also benefits to being in class in person <ul style="list-style-type: none"> <li>○ Maggie - this works for January/Feb but would like to branch out to year round topics</li> </ul> </li> </ul>
<b>Consistent in connecting OT and PT into the IEPs</b>	<ul style="list-style-type: none"> <li>• Examples: PT can write a catching goal that doesn't relate to any academic or functional goals in the IEP, but OT can't support fine motor development unless there is an academic goal around writing <ul style="list-style-type: none"> <li>○ Kids come in from CDS with OT needs and goals but we can't address them because they don't have academic needs yet...maybe they only have OT, speech,</li> </ul> </li> </ul>

	<p>and behavioral functional goals but OT goals around fine motor skills</p> <ul style="list-style-type: none"> <li>• Tracey - do we have a resource with the ways we can relate into the IEP, write and word in a way so that if we are audited it is clear</li> <li>• Erin - has an example of a K student transitioned in, clearly needs OT (visual and auditory distractions, sensory based not fine motor) - she avoids work and doesn't attend to difficult fine motor task even though she has the skills to do so due to the other stuff. Do we attach to the "time on task" behavior goal? "Given direct and consult OT services..." This was questioned in the meeting <ul style="list-style-type: none"> <li>○ It's not just about the skill or the product, it is also about how we do what we do</li> <li>○ The hard part is behavior isn't "academic" but the need is affecting her academics in the classroom and OT can help</li> </ul> </li> <li>• Tracey - would rather hit the early intervention when we see issues vs. letting them fail first just because the IEP connection isn't clear</li> </ul>
<b>Discharge Summaries</b>	<ul style="list-style-type: none"> <li>• Maggie - not often at IEP meetings because of the IEP day schedule. Used to write a progress report or add into written notice, attaches the progress note in adori into the written notice under archives with the progress and plan going forward <ul style="list-style-type: none"> <li>○ Now - if recommending discharge will add discharge summary to bottom of this progress report. Puts it in red <ul style="list-style-type: none"> <li>■ Will list skills used for each goal, will list accommodations</li> </ul> </li> <li>○ Complaints from case managers coming in that they don't know what kids need, or why they were discharged when they still have needs <ul style="list-style-type: none"> <li>■ Katy - this should be in the IEPs</li> <li>■ Katy - do people know to look under attachments in written notice</li> </ul> </li> </ul> </li> <li>• Erin - if there was anything "extra" in some files or others it became an audit issue because it wasn't consistent</li> <li>• Maggie - Matt suggested we decide how we want to store this and share this <ul style="list-style-type: none"> <li>○ Adori - links only to last written notice</li> </ul> </li> <li>• Tracey - but everything should be listed in accommodations which get pulled forward. <ul style="list-style-type: none"> <li>○ Maggie - paring down of accommodations happens sometimes when OT isn't at meeting due to being</li> </ul> </li> </ul>

	<p>discharged so it gets removed</p> <ul style="list-style-type: none"> <li>○ Do we put it under “student details” so it is always available?</li> <li>○ Tracey - makes me nervous because discharged from a lot of things, does it become inconsistent and all services now need to write a discharge summary beyond what is recommended and discussed in IEP meetings</li> <li>○ Katy - or we get eval requests at the BHS level for a kid who was discharged and it isn’t necessary</li> <li>● Maggie - maybe the accommodations list needs to be more clear and consistently carried over <ul style="list-style-type: none"> <li>○ Katy - if you’ve discharged, those accommodations don’t always get carried forward if you aren’t in the meeting</li> <li>○ Maggie - maybe behaviors around work for some of these students wouldn’t be increased if we had them set up appropriately</li> </ul> </li> <li>● Tracey - worries about audits/lawsuits when we have inconsistency <ul style="list-style-type: none"> <li>○ If she can’t be at meeting, she talks to casemanager/IEP coordinator, and sends a report to be reviewed</li> </ul> </li> </ul>
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Action Steps			
Plan	Roles	Timeline	Strategies
Create a resource for IEP Coordinators	TBD		
Find technology that would truly be universal learning	Maggie to continue conversation with Janice who will relay ideas to Tricia	By next PLC will have some info to share	
Education around role of OT/PT and building understanding of when/why services change	Katy has started PT criteria guideline	Will complete week of 2/27 so can share with OTs	
Create a collaboration opportunity with Technology	TBD		
Related service provider meeting to clarify how we attach to	TBD		

IEP with Jess Yates			

<b>Team:</b>	OT/PT	<b>Assigned Topic:</b>	Student Specific Therapy and Safety Protocol Development
<b>Meeting Date:</b> 11/8/2022			
<b>In Attendance:</b> Katy Baughman, Tracey Dearborn, Erin Jackson			
<b>Guiding Questions Discussion</b>			
<b>Question</b>	<b>Discussion</b>		
<ul style="list-style-type: none"> <li>Why do we need student specific protocols?</li> </ul>	<ul style="list-style-type: none"> <li>Varying individual needs - nothing is cookie cutter</li> <li>Potential lack of experience of staff to embed - may not have OT/PT skill sets</li> <li>Safety is the primary concern for needing protocols</li> <li>New staff training - providing multiple forms of sharing information</li> <li>Documentation of trainings and info being shared</li> <li>If we want staff to embed skills - can we have a protocol or template to give them so we aren't writing it all down each time <ul style="list-style-type: none"> <li>Tricky because each kid is so different, and writing protocols for so many things (besides safety) may not be efficient or as individualized and might drown the staff person in too much information</li> <li>Protocols would have to be changed super frequently and make the process too rigid. Part of our consult time is troubleshooting ways to embed skills as the student</li> </ul> </li> </ul>		



	<p>changes, often very frequently. This is why consult time is so important to check in on progress and make adjustments</p> <ul style="list-style-type: none"><li>○ Protocols may lock staff into only one way of doing a task instead of using their knowledge of the student, their experience and their own critical thinking in the moment to make adjustments for greater success.</li><li>○ ** A protocol should only be made when we do not want any adjustments to the way the task is performed. This is most easily illustrated in matters of safety. **</li></ul>		
<ul style="list-style-type: none"><li>● Can we create a template to guide this work?</li></ul>	<ul style="list-style-type: none"><li>● Templates would work for broad information but would still need to be modified to be more student specific<ul style="list-style-type: none"><li>○ Universal vs. individualized</li></ul></li><li>● Can use broad template and add highlighted sections for what is being added/changed for that specific student... then it is clear what is being differentiated from the broad template and saves some time in creating the whole thing</li></ul>		
<ul style="list-style-type: none"><li>● How does it get shared with others?</li></ul>	<ul style="list-style-type: none"><li>● In person trainings</li><li>● Mobility binders in programs</li><li>● Google drive sharing</li><li>● Videos shared at trainings and in google drive</li><li>● ** Would like to have opportunity to train all on baseline information **</li><li>● Share video with survey to document that they have watched</li><li>● “Therapy Thursdays” where we share quick tips/tricks (not protocols but ideas) weekly</li></ul>		
Action Steps			
Plan	Roles	Timeline	Strategies
Create universal videos for mobility protocols	Katy to do this	By Dec break	Dedicated time during PTC hours

### Group Norms (3):

1. We will show respect for each other and differing opinions
2. We will collaborate effectively
3. We will work efficiently

**Identify other topics for future PLC times:**

- Improving communication on Permission to Test form and Written Notice so that it indicates what testing is related to or the reason it was requested on students who are unfamiliar to us or when we weren't at the meeting
- “Therapy Thursdays” - OT, PT, SLP, and SW tips and tricks slides shared school-wide like Tech Tuesdays
- How can we be consistent in how OT/PT connect to the IEP
  - One example: PT can write a catching goal that doesn't relate to any academic or functional goals in the IEP, but OT can't support fine motor development unless there is an academic goal around writing
    - Kids come in with OT needs but we can't address them because they don't have academic needs yet...  
Related to this last bullet - Maggie asks: Can we collect a list of the kinds of needs we are seeing that are going “untreated” so this can be addressed more specifically?
  - Possibly develop a chart that helps draw connections between specific skills assessed by OT, and the potential impacts on special education services (including speech only). To be used only as a reference, not eligibility determination or anything like that.
  - Related to this last bullet - Maggie asks: Can we collect a list of the kinds of needs we are seeing that are going “untreated” so this can be addressed more specifically?
  - Possibly develop a chart that helps draw connections between specific skills assessed by OT, and the potential impacts on special education services (including speech only). To be used only as a reference, not eligibility determination or anything like that.

I think this is a cool idea! Are you thinking something like this?...

This looks really do-able. I'll try it out..

Skill	Impact to speech	Impact on academics	Impact on physical access/safety
directionality		Reversals in writing Orientation to page Following instructions Tracking for reading	