



## Case Study 1

Sarah is an occupational therapist (OT) in the Red River Independent School District (RRISD) with a case load in several buildings in the district. In the summer, she attended a conference for OTs and other related service personnel and participated in several sessions about the use of assistive technology (AT) tools. As Sarah learned more about how some AT tools might be of benefit to a particular student she was working with, she began to realize how AT could assist many of the other students with different types of disabilities with accessing the curriculum. To build her knowledge base, she joined an on-line community of practice group and attended more professional development workshops whenever she could. As her work continued during the school year, she began using AT more systemically with her students and began coaching her colleagues on the SETT framework for consideration of AT.

The Red River Related Service Coordinator realized that Sarah was developing her knowledge and skills in AT and, at the same time, influencing others in acquiring skills and using AT with students. The coordinator and Sarah decided to form a district evaluation team. They recruited three additional team members, but neither Sarah or the other team members were allocated additional time for the AT duties and their other responsibilities were not reduced. After six months, the team became frustrated as they felt they were being penalized for their interest and desire to do well. In order to find out more about building a more systemic approach to providing AT services, Sarah contacted the regional education service center and learned about a multi-year AT training project.

## Discussion Questions

1. What strengths does this approach have?
2. What positive acts did Sarah take to make change?
3. What barriers is this team facing?
4. What recommendations would you have for this team?
5. What steps are being explored for sustained leadership?



## Case Study 2

Realizing that Red River ISD (RRISD) needed a more sustainable model of AT service delivery, Sarah asked for a conference with the Special Education Director. Sarah got permission to submit an application for RRISD to participate as a team in the multi-year AT team project sponsored by the regional education service center (ESC). RRISD formed an AT team consisting of a manager, two special education teachers, a speech language pathologist, and Sarah, the occupational therapist. To align with the ESC requirements for teams, they were given release time for their professional development activities aligned to the project.

As a part of the training, the team used the Quality Indicators for Assistive Technology (QIAT) Self-Evaluation Matrices to compare their services to best practices across seven indicator areas. Based on the data the team compiled, they determined that they should focus on fundamental areas, starting with Consideration of Assistive Technology, Assessment of Assistive Technology Needs, and Including Assistive Technology in the IEP.

As a next step, the team arranged a meeting with the director and presented the data and their ideas for improvement. Sarah explained to the director that there were areas in which they could have direct impact if they had support from district administration and management, but that there needed to be a change in practice at that higher level also. Sarah also asked the director to complete the eighth area, Administrative Support for AT and to work with them to improve systemic services in that area. After reviewing the indicator areas and data, the director gave each team member three hours a week to work together to develop strategies to improve AT outcomes. Their caseloads were also reduced so that they could provide services.

The team used the QIAT Matrices Worksheets to record their ratings from the matrices, document the actions steps that were needed for improvement and prioritize the steps. The team decided that the actions that would have the most impact would be developing guidelines for AT practice in the areas of consideration, assessment and including AT in the IEP and disseminating the information through professional development training opportunities. They also got the director's approval to post the guidelines on the district website.

### Discussion questions:

1. Describe how the team used the QIAT Matrices to determine needs.
2. Where could the team make an immediate impact?
3. What strategies did the team use to influence the director?
4. What was the impact of the strategy to include the director?



## Case Study 3

During the next year, the Red River ISD (RRISD) team developed guidance documents which included information on consideration, evaluation and documentation of AT in the IEP. They also developed a series of training opportunities that would support the processes set forth in the documents.

The director was impressed with the guidelines but had questions about what the next steps should be. She asked how the team planned to make sure the guidelines were used. Sarah explained that in the team training in which they were participating, the team had heard that there are five stages of implementation and that there are factors at each stage that need to be considered. The team, with the help of the director, researched and found the Stages of Implementation Analysis, developed by the National Implementation Research Network, which they could use.

The team completed their Stages of Implementation Analysis and discovered that their work was basically identified as being in the installation stage. The team was surprised that they were still in the installation stage and wondered if they were “doing it right.” The director reminded them that change processes take from three to five years to reach sustainable practice. As they wanted to continue to make progress and move forward, they elicited the director’s support to engage other key stakeholders and form an implementation team

Next the implementation team studied the steps that are part of initial implementation and full implementation. Their review provided several ideas for them to use in action planning to improve practice and lead to the next stages. In order to ensure that the guidelines and training were having the desired impact, they further refined their processes. Each time they presented the training on the AT topics, they collected the questions that came up and compiled them into a question and answer document that was posted on the district website along with the guidelines. The team also began coaching, when requested, with individual IEP teams to develop and implement AT support strategies. Three months after each event, they conducted a training follow-up survey to ensure that educators were understanding and following through with the new processes.

### Discussion Questions:

1. Are you surprised that the team was in the installation stage? Why or why not?
2. What other actions that might help RRISD move to full implementation?



3. What support does a Stages of Implementation Analysis provide a team?
4. In forming an implementation team, what other key stakeholders might be important to include to progress to full implementation and sustained practice?

### **New Case Study 4**

After conducting the Stage of Implementation Analysis, the Red River Independent School District (RRISD) implementation team was pleased with their action planning but wondered if they had considered all the factors that they should to progress to full implementation in a more purposeful way. They asked their director for a conference to explore ideas about other issues that they might need to take into account in their planning.

The team was able to explain to the director what they wanted to improve, through use of the QIAT matrices and improvement planning. They could document what they were doing to create the change they wanted to see. The director asked if their activities were aligned to the desired changes and if they could measure the results of their work across the district.

The director explained that there is a concept known as “improvement cycles” which supports a team in planning their actions to create change. The improvement cycle the director introduced is called a plan/do/study/act (PDSA) cycle. In each implementation stage, the team plans the steps they need to take, implements the activities, and evaluates whether the activities helped in making progress towards their team goals. Next they adapt their plan to respond to the impact data.

The team felt that they were implementing parts of the PDSA cycle. Sarah was able to show how specific activities were aligned to changes in practice. The director agreed that they were making excellent progress, particularly in “planning” and “doing.” She asked the team to explore a little more in reviewing the outcomes of their activities (study) and adjusting their activities based on that review (act). The team agreed to try this out.

They studied their professional development activities and developed ideas on using improvement cycles. Specifically, after they presented their training events, the team analyzed the questions they received, and rather than using the method of posting questions and answers to the website, they developed webinars to address the issues in greater depth. These webinars would also be beneficial to training needed for new staff and team members due to normal turn-over.

With Sarah’s leadership, the team wondered if the planning was only for the team’s actions, or if there should be planning for the full district. They posed this question to the director, who with the team researched and found information about implementation drivers, through the



National Implementation Research Network (NIRN). The team and the director explored the drivers to examine whether they were in place to help support change for the district and were in alignment with their goals for AT change.

They agreed that competency drivers included focusing on AT best practices as described in the QIAT indicators. The organizational drivers, such as the district's support for adoption of the AT initiative strategies, could be increased. Leadership drivers were strong but could be improved through more support for the team through increased time allocated to AT team work.

The team analyzed their AT practice at the end of Year 3 of their team change process. They found that there was growth in most of the AT indicators for consideration and evaluation. They saw dramatic growth in indicator 4 in the Documentation of AT in the IEP, with practice improving from a ranking of 2 to a 4.

The team was gratified with their growth. They were enthusiastic to see what further growth they could support by addressing additional indicator areas in the QIAT work in the following year.

Discussion questions:

1. What ideas do you have to help the Red River team with PDSA for their activities?
2. What other supports are needed to strengthen the drivers?
3. How do you think the implementation drivers will change as teams move through subsequent implementation stages?
4. Why didn't the team stop after their sizable growth in their first three years?
5. What is needed to continue to support the sustained leadership?