

ABSTRACT

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FACILITATOR: A JOB ANALYSIS.

Megan Michelle Vaganek, Master of Arts
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Directed By: Professor Emerita Sylvia Rosenfield,
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Teams have become a primary vehicle for problem solving and decision-making in schools, but research on team leaders in schools is weak. Instructional Consultation (IC) Teams is a team-based early intervention program aiming to improve student achievement through changes in teacher beliefs and enhancement of teacher practices. The leader, or IC Facilitator, is a driving force of the program, responsible for team training and maintenance. A job analysis, conducted using a review of IC literature and training materials (known as a content analysis) and interviews with 12 facilitators, resulted in a comprehensive list of statements regarding tasks, knowledge, skills, abilities and attributes, and performance standards that characterize the job. Interview-generated statements are consistent with those outlined in training materials. Facilitators in this study also reported participation in additional tasks, outside of the expected role. Implications for training and recruitment and, limitations and directions for future research were explored.

THE INSTRUCTIONAL CONSULTATION FACILITATOR: A JOB ANALYSIS

By

Megan Michelle Vaganek

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Advisory Committee:
Professor Emerita Sylvia Rosenfield, Chair
Professor Gary Gottfredson
Dr. Deborah Nelson

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Chapter 1: The Problem: A Need for a Better Understanding of the IC Facilitator

The use of teams in schools for problem solving and decision-making is a mandated practice since the signing of P.L. 94-247 in 1975 (Iverson, 2002), as this law mandated the use of multidisciplinary teams as the decision-making entity for special education eligibility and placement. Subsequently, many states followed suit, recommending or mandating the use of teams for a variety of other purposes in schools (Iverson, 2002). Iverson described the two major types of teams that emerged since the initial mandate as (a) broad participation teams and (b) teams of specialists who consulted with regular education teachers. The team approach has been adapted to serve a variety of purposes, including pre-referral teams focused on consultation, instructional support, and intervention (Kovaleski, 2002).

Despite the widespread establishment of teams in schools across the country, team practices are not usually built on evidence, and members are typically provided little or no training in group process (Iverson, 2002). In a review of the literature from 99 peer-reviewed journals between 1980 and 1997, Welch, Brownell & Sheridan (1999) found that only 18 articles had been published on school-based problem-solving teams and only one-third of those articles reported on empirical research. It appears that team practices are rooted in assumptions about group process rather than empirical evidence. Practical issues and advice about training and practice have appeared in the literature (e.g., Kovaleski, 2002) and studies on IC teams, described below, provide some information about the skills of the team leader.

The literature on leadership in schools focuses primarily on principals, and often within the context of school improvement, school change, and the implementation of new innovations (e.g., Hall & Hord, 2006; Huberman & Miles, 1984). Change agents are also influential for school improvement and program implementation (Hord, Stiegelbauer, & Hall, 1984). Fullan (1991) stated that the change agent or facilitator is typically responsible for introducing, leading and supporting new programs within schools. Research on facilitators is important because the facilitator or change agent has considerable influence over adoption and implementation of programs (Fullan, 1991; Rodgers, 2003). Along with the principal, facilitators play a role in achieving global, systemic change in schools. (Fullan, 1991; Hall & Hord, 1984; Rosenfield & Gravois, 1996).

Instructional Consultation (IC) Teams

Instructional consultation is a consultee-centered consultation model, primarily delivered through a school-based team format that provides assistance to classroom teachers with academic or behavioral concerns for students (Rosenfield, 1987; Rosenfield & Gravois, 1996). The goal of IC Teams is to improve student achievement in the general education environment by supporting teachers' capacity to use assessments, collect data, and employ instructional practices that are based on evidence (Rosenfield & Gravois, 1996). Three critical assumptions underlie the IC Teams model: (a) All children can learn under the right conditions, (b) Focus must be on the match between a student's skills with the task and instruction, and (c) a problem-solving, collaborative school community is beneficial. These assumptions

suggest that student success can be enhanced through teacher professional development and collaboration.

Instructional Consultation emphasizes a stage-based model of problem-solving and the consultation relationship with the consultee (usually a teacher with concerns about a child or class' progress) (Rosenfield & Gravois, 1996). The stages of problem solving in the IC model are entry and contracting, problem-identification, intervention design and implementation, intervention evaluation, and case closure. The consulting relationship provides the context for teacher reflection and change.

While IC occurs within a team format, referring teachers work with an individual member of the team, or case manager, who has been trained in the problem-solving process. According to the IC program model, team members include administrators, general education teachers, special education teachers, and support personnel, but classroom teachers represent a larger proportion of the team relative to other professionals. The team is lead by a facilitator who receives advanced training in the problem-solving process and communication skills. The IC facilitator then trains teachers in case management and communication skills. It is the IC Team facilitator role that is the focus of this study.

IC Team Facilitator Role

The IC facilitator's key task, as seen by the program's developers and trainers, is "to build a core team that is skilled in the IC collaborative problem solving process" (Rosenfield & Gravois, 1996). The facilitator introduces the IC process, develops the team, and facilitates service delivery through ongoing team-member training, coaching, and collaboration with building and district administrators. The

major facilitator activities outlined in the IC Teams Facilitator Training Manual (Gravois, Rosenfield, & Gickling, 2002) involve planning and conducting team meetings, coaching team members, modeling the collaborative consultation process, receiving external support and training, consulting with the principal, disseminating information to staff about the IC Team and assisting program evaluation. The facilitator also functions as an active team member, taking cases with teachers who have a concern regarding the academic progress or behavior of a student, small group or their class as a whole (Rosenfield & Gravois, 1996).

The IC team developers' writing on leadership in IC teams reflects some of the skills that the broader literature suggests are necessary for success in leading teams. Iverson reported that facilitation is an important skill for group process (2002). Some of the skills she found to be necessary include listening, encouraging group members to participate, aiding decision-making, and building trust and group cohesion. While several authors make suggestions about the necessary skills for effective group facilitation (Iverson, 2002; Kovalski, 2002; Rosenfield & Gravois, 1996), there seems to be less known about the actual expectations and requirements for group leaders in their day-to-day professional lives. Rosenfield and Gravois (1996) analyzed audio-tapped logs of facilitators in order to better understand the specific tasks and skills required for the job. Skills outlined by Saxl, Lieberman, and Miles (1987) were the basis for the coding used by Rosenfield and Gravois. These skills can be found in Appendix A. In terms of knowledge, mastery of the content of the IC program and a general grasp of educational issues and educational content were deemed necessary. The authors also noted that a commitment to the

assumptions underlying the innovation was reported in the recorded logs. Social-emotional skills were also considered vital in order to carry out the role of the facilitator.

In order to speculate meaningfully about the necessary skills, expertise, beliefs or personality variables of effective facilitators, we must understand exactly what facilitators are asked to do. The current study aims to outline the specific tasks an IC Facilitator must accomplish as a part of an IC intervention in a school; the purpose is to elicit the knowledge, skills, abilities, and performance standards the participating facilitators find relevant to their job.

Research on the Facilitator Role

Thomas (2004) remarked that literature on facilitators focuses on the skills, methods, models or theories of facilitation, but neglects the assumptions and philosophies behind the processes through which facilitators develop. Facilitation and leadership research and writing is more frequently found in the management and psychology literature (DeChurch, Hiller, Murase, Doty, & Salas, 2010) than in education despite the increased use of facilitation for teams in schools. Thomas (2004) reviewed facilitator literature across a number of fields and classified the approach to facilitator education based on how aware one is of the rationale for action in facilitation. Facilitator education approaches can be categorized as follows:

- Approaches with a narrow focus on skills and formulaic approaches
- Approaches grounded in theory
- Approaches that emphasize the motives behind actions and personal qualities necessary for facilitator

- Approaches and education programs that raise awareness of the political nature and implications of facilitation.

Although some work has been done to better understand the facilitator, Thomas states that the literature is weak and only a small portion is grounded in empirical evidence and suggests that even the use of naturalistic approaches would strengthen the available knowledge about facilitation.

One of the key tasks of the IC facilitator is to lead a team of case managers. Research on leadership sheds some light on the expected role of the IC facilitator.

Research on Leadership

The management and psychology literatures describe leadership through lenses of many theories and perspectives. Leadership literature focuses on several levels, from lower-level team and unit leaders, to middle management and top-level, executive leadership.

DeChurch et al. (2010) described six major leadership perspectives prevalent in the literature. One common approach is the trait-based approach, in which researchers have sought to identify the characteristics related to leadership effectiveness. Traits like the Big Five (extraversion, neuroticism, conscientiousness, agreeableness, and openness to experience) have been linked to leadership emergence and effectiveness. The trait-based approaches described by DeChurch et al (2010) bear the most resemblance to the literature on IC Teams, in that some work has been done to identify some of the traits and skills that may be required for change facilitation. Key skills described by Rosenfield and Gravois (1996) and Gravois,

Rosenfield, and Gickling (2002) (see Tables 23 and 24) also mirror many of the team leader functions described by Morgeson et al. (2010), described below.

Researchers have also used a behavioral approach in which behavioral dimensions associated with effective leadership are isolated, such as initiating structure and consideration (Fleishman, 1953). Leader-member exchange theory states that leader form different relationship patterns with subordinates, resulting in in- and out-groups

According to Morgeson, DeRue, and Karam (2010), a key aspect of team leadership is oriented around meeting team needs. Leaders can be internal or external and the formality of the leadership role is on a continuum. The IC Facilitator is an internal leader, which adds a high degree of formality to their role, as they are appointed by the school and receive additional training.

Morgeson et al. (2010) compiled lists of team leadership functions based on a comprehensive review of leadership literature. Teams function in a cycle of two phases: transition and action. Transition activities focus on evaluation and planning and action activities work to complete tasks and accomplish goals. These functions will be compared to the IC facilitators' tasks and will be described in Chapter 5.

In the transition phase, leaders perform many functions. First, leaders compose the team. They may assess skills, redistribute responsibilities, or replace members of a team that is already in place. Leaders also define the mission and establish expectations and goals, but team members should play an active role. The team leader must structure and plan the team's work and determine the best ways in which the team can meet their goals. Also in this phase, leaders train and develop the

team. Skills and knowledge related to the content of the team's work must be addressed, as well as those related to the interpersonal processes of the team. Sensemaking is another team leader function. Here, the leader interprets and communicates environmental effects that may impact team functioning or goal attainment. Finally, in this phase team leaders provide feedback to maintain the functioning and development of the team system.

In the action phase described by Morgeson et al., team leaders monitor and evaluate the team's progress and performance. Managing team boundaries means that the leader represents the team's interests outside the group. Leaders must challenge the team regarding their performance, assumptions, methods, and processes. Authors also suggest that leaders perform team tasks by taking a more active role in the team's work. Leaders also solve problems and provide resources. Encouraging self-management and supporting the social climate on the team also fall under the purview of the team leader.

Prior Research on IC Teams Facilitators

Although qualitative and experimental means have been used to study a variety of outcomes and factors associated with IC Teams (e.g., Rosenfield, Silva & Gravois, 2008), less research has focused on the IC Facilitator. McMahon (1998) studied the necessary skills through the perceptions of facilitators and IC Team members in urban and suburban schools. The participants rated 18 skills (Appendix A), on their importance to the facilitation of IC Teams, the frequency of use by the facilitator, and the skill level of the facilitator. These 18 skills for change facilitation (adapted from Miles, Saxl & Lieberman, 1988) were viewed as necessary by program

developers for the facilitation of education innovation (Rosenfield & Gravois, 1996). McMahon (1998) discovered that both facilitators and team members rated all 18 skills as moderately to very important, with a frequency of use that varied from infrequent to very frequent. Facilitator's self-report of skill levels ranged from minimally to highly skilled. McMahon's study of the perceived importance of these 18 skills points to some agreement between the expectations of the program developers and the actual beliefs of IC team members and facilitators. While these congruent beliefs are important, this study does not address potential other skills or tasks of IC facilitators that have not already been identified by program developers.

The need for deeper investigation of the IC Facilitator was highlighted during a four-year experimental investigation of the effectiveness of Instructional Consultation Teams (Rosenfield & Gottfredson, 2004). During the four years of on-going training, support and contact with university researchers and IC staff, IC Facilitators played a vital role in the implementation of the program. Over time, the research team learned, based on anecdotal and program evaluation data, that facilitators were involved in their school community and the actual implementation of the program to varying degrees. One of the IC Facilitators and the supervisor of program evaluation in the school district created an online survey to assess facilitators' level of satisfaction with their role, professional development opportunities and other feelings about their jobs (Neill & Cassata, 2009). Twenty-five of the 28 facilitators in the district at the time of the survey, December 2008, voluntarily participated. The facilitator who coordinated the survey noted that the data

were intended to inform a strategic plan for growth for IC Teams in the county (Neall & Cassata 2009).

Facilitators had an opportunity to write open-ended responses in addition to rating their satisfaction and agreement with several statements regarding their role. These comments provide some evidence for the variability in perceptions of the role within facilitators in the study. Results showed that some facilitators seemed to take initiative for collaboration and self-improvement, while others saw little value in asking for assistance from colleagues. Some facilitators commented that there is variability in the extent to which facilitators fulfill job responsibilities (Neall, 2009). The comments on the survey demonstrate variability within the facilitator community in one school district, and suggest the need for further research on facilitator perception of the role.

In addition, schools in the study experienced facilitator turnover (Berger, Vaganek, Yiu, et al., 2011). Only eight out of 17 treatment schools had the same facilitator over three years of program implementation. Of the nine schools that experienced facilitator turnover in the first three years of the project, seven schools had two facilitators and two schools had three facilitators (i.e. a new facilitator each school year). Berger et al. found that facilitator stability was positively and significantly related to how many teachers in the school used the services of the team. Berger et al. also measured use with program records. This measure of use was positively related to facilitator stability, but not always statistically significantly so. Because of the nature of the implementation process, where facilitators are responsible for training team members, a change in facilitator in the middle of the

project could derail training for all team members. While causation cannot be inferred from the relationship between facilitator stability and use, Berger et al.'s finding suggested that stability of IC Facilitators may be influential in program use, warranting further investigation into causes of stability or turnover.

The evidence that the role of facilitator is variable, the facilitators' comments on their own internal survey and the finding that turnover in the program may be an important factor in use, point to for the potential usefulness of further study of the IC Facilitator role. In order to better understand the role of the facilitator, in the present report I recount a first step in this direction: a job analysis, resulting in a list of task statements that give a detailed summary of the job.

Job Analysis

The general, modern definition of a job analysis is collection, organization and analysis of job-related information, for any purpose, using any method (Ash, 1988; McCormick, 1979). The US Department of Labor (1991) defined a job analysis as:

a systematic study of a specific job in terms of the workers' relationships to data, people & things, methodologies and techniques employed, machines, tools, equipment and work aides used, materials, products, subject matter or service which result and worker attitudes that contribute to successful job performance.

(pp. 11)

Variations of job analysis techniques emerged over the years, such as Functional Job Analysis (FJA), Job Element Procedure, Critical Incident Analysis,

and many others. The Functional Job Analysis procedure was the basis for the methods in this study.

A Variation of Job Analysis: FJA. The fundamental concept that distinguishes FJA from other variations of collecting job-related data is the emphasis not only what gets done, but also what workers do to get things done (McCormick, 1979). FJA includes traits and behaviors, in addition to tasks. FJAs are applied to one job at a time. Other methods including the task inventory approach, compare multiple jobs, and focus more exclusively on tasks (Harvey, 1991). The ideas now associated with FJA evolved between 1950 and 1960 at the U.S. Employment Service, guiding the research that resulted in the occupational classification system for the *Dictionary of Occupational Titles 1965* (Fine & Cronshaw, 1999; McCormick, 1979). FJA is based on several core propositions, such as (a) considering context (“People are whole persons”), (b) how workers relate to Data, People and Things, (c) specific Knowledge, Skills and Abilities acquired in particular Job-Worker situations and (d) tasks as the basic components of work (Fine & Cronshaw, 1999).

Job analyses can be used to for a variety of purposes, including job descriptions, job classification, job design and redesign, worker training, selection, and performance appraisals, among others (Brannick & Levine, 2002; McCormick, 1979). Jones and DeCoths (1969) investigated the uses of job analysis. They distributed surveys to over 1,800 firms. About half of the surveys were returned. Of those firms, 76% had job analysis programs in place. The major categories of use were job evaluation (for setting wages and salaries), recruitment and placement, personnel utilization and training. Research findings on the validity of Functional Job

Analysis results are mixed. However, authors argue that the true measure of FJA is its usefulness, because they are often conducted when information is needed to make a decision (Brannick & Levine, 2002). McCormick described validity of a job analysis as the extent to which the reality of the job is reflected, but he noted that the true validity (or true ‘reality’) of the job is difficult to know (1979). He defined reliability as the consistency of the information elicited from workers by multiple analysts or across time points. It is possible to replicate the job analysis with multiple analysts or at different times, though this is rarely practical. Because job analyses require a series of decisions to be made regarding sampling, data collection, and interpretation of tasks, it is a tool that could benefit from further study.

Job analysis methods can be used for a wide-variety of purposes and can lend meaningful insight in to the day-to-day responsibilities of workers. Applying techniques from FJA and other general job analysis methods, one could gain deeper insight into the necessary skills and required tasks of the IC Facilitator.

Purpose of Current Research and Research Question

As stated above, the IC facilitator is expected to play a critical role in the implementation of IC Teams. IC program developers Rosenfield and Gravois (1996) have outlined expectations for the tasks, knowledge, and skills that may be required for facilitators to carry out their role. Some research has been conducted on perceived importance, frequency of use, and facilitator skills, using skills outlined in the IC teams literature (McMahon, 1998; Rosenfield & Gravois, 1996). The purpose of the present research was to better understand the role of the IC facilitator by using

a job analysis to generate tasks, KSAs, beliefs, and performance standards relevant to the IC facilitator job. The research question addressed in this study is the following:

What are the tasks, knowledge, skills, abilities and attributes, performance standards and beliefs of the IC facilitator?

Definition of terms.

The job analysis literature shows general consensus over the definition of a job analysis, but authors do not agree on definitions of various elements of the process. The definitions of terms used in the study are defined below.

Instructional Consultation (IC) Facilitator is the team leader of a school's Instructional Consultation Team. The IC Facilitator is expected to be responsible for the implementation of the IC Team model in the school (Rosenfield & Gravois, 1996).

Tasks are discrete actions, with a beginning and end, that when carried out over time, contribute to a specific end result or the accomplishment of an objective (Fine, Fine, & Getkate, 1995; Fine & Cronshaw, 1988 Gael, 1983; McCormick, 1979).

Task statements are used to describe tasks. They usually contain specific action verbs and a concise indication of what is being acted upon by the worker. Task statements tell what is being done to what. Qualifiers may also be included to describe 'how' and 'why' tasks are performed (Gael, 1983).

Tasks (and other) categories are similar to task clusters in the JA literature. Clusters (called categories in the present study) help to organize task statements, to help edit them, and to provide insight into the constructs represented in the job. Task

statements and task clusters should include what is done, how and by whom or what it is done and why (Goldstein, Zedeck, & Schneider, 1993)

Knowledge describes information and ideas that the job incumbent needs in order to get his or her work done (Fine & Cronshaw, 1999).

Skills are acquired competencies one must have in order to carry out tasks.

Fine & Cronshaw, 1999). Skill ranges from simple to complex.

Abilities & attributes. Abilities relate to one's capacity to do a task well and can be expressed using adjective or adverbs (Fine & Cronshaw, 1999). Attributes, sometimes called personal characteristics, describe, that a worker feels he or she possess that facilitator task completion or knowledge/skill demonstration (Goldstein, Zedeck, & Schneider, 1993; Harvey 1991). Abilities and attributes are combined in the present study to represent characteristics of the facilitator that influence the way in which they complete tasks.

Performance standards are the standard that employees work toward. These include personal and organizational standards.

Beliefs describe the values and assumptions that facilitators feel are important to their role. Beliefs were included in the job analysis so that they could be compared to the critical assumptions of the IC Teams described in the IC training literature (Gravois, Rosenfield & Gickling, 2002),

Chapter 2: Method

In this chapter, a detailed methodology is presented including description of the interview protocol design, study participants, job analysis procedures, analysis of interview data, and verification of interview data. The purpose of this research was to identify the tasks, knowledge, skills, abilities and attributes, and performance standards of the IC facilitator.

Job analyses are generally two-part endeavors. Job-related data must be collected from a source and then the information must be organized and presented so it is useful for practical applications (McCormick, 1979). The methods selected for job analyses depend on the purpose and available resources

Collecting Job Analysis Data.

Job incumbents are the most commonly used sources of job-related data, though other sources may be consulted (McCormick, 1979). In Rupe's (1956) job analysis with the military, he concluded the individual interviews were the most effective and dependable, with average cost in investigator time and higher numbers of job elements or tasks reported compared to other techniques. According to Rupe, technical conferences and observation-interviews were practically equal to individual interviews in the production of job-related data, but that the time cost was high. According to Fine and Cronshaw (1988), FJA differs from other methods of job-related data collection in that, because of the importance of context and a systems approach, FJAs cannot be conducted with checklists and questionnaires alone; FJA's conceptual framework necessitates that analysts obtain job-related information

directly from workers. In keeping with Fine and Cronshaw's (1988) recommendations, individual interviews and technical conferences with a program developer were also used in the present inquiry.

Compiling and Interpreting Job Analysis Data.

Tasks are described in Task Statements, usually containing specific action verbs and a concise indication of what is being acted upon by the worker (Gael, 1983). Task statements and task clusters should include what is done, how and by whom or what it is done and why (Goldstein, Zedeck, & Schneider, 1993). Examples of sample tasks include "solder minor leaks in radiator" and "type minutes of reports from meetings" (McCormick, 1979). Mental tasks, though more difficult to state because they often lack a distinct start and end point, are still described in the job analysis (McCormick, 1979). Tasks can be divided into job-oriented and worker-oriented activities. Job-oriented activities describe activities performed (e.g., galvanizing, weaving, cleaning) whereas worker-oriented activities describe human behaviors (e.g., sensing, decision-making, communicating) (McCormick, 1976). According to Goldstein et al, it is useful to develop task clusters from the list of task statements. Often Subject Matter Experts (SMEs) make independent judgments in order to create the clusters (1993). Functions are groups of related tasks and jobs are combinations of functions performed by a single employee. As the smallest unit of work that can be meaningfully defined, tasks and lists of task statements communicate the requirements of a job more clearly than job titles. Task statements and clusters can be used to inform research and development of competencies required for the job (Goldstein, Zedeck, & Schneider, 1993).

Personal characteristics (sometimes referred to as the O for ‘other’ in the KSAO acronym) can be defined in the job analysis. These characteristics or approaches are not included as skills or knowledge, but they may affect the way in which employees carry out their work. Flexibility, ability to show empathy, and openness to feedback are examples of personal characteristics that are relevant to work. These attributes should be written in a way that allows job analysts or others to judge or rate the items in order to assess current or potential employees on those characteristics (Goldstein, Zedeck, & Schneider, 1993). These ‘other’ characteristics are hypothetical constructs that may be difficult to directly observe (Harvey, 1991).

Current Study.

The present job analysis study was based on the methods used by Gael (1983), Fine and Cronshaw (1999), and Brannick and Levine (2002). Cornelius (1988) concluded that simple job analysis techniques often produce job-related data that is equal in quality to more complex methods. Large-scale job analyses sometimes employ statistical methods, like regression equations, to predict test scores and calculate validity coefficients, but qualitative methods are regularly used to address practical questions in smaller-scale projects (Cornelius, 1988). Qualitative methods predominate in the present study.

This study also followed the general two-part model described by McCormick (1979). Data were collected from a content analysis and individual semi-structured phone interviews with job incumbents. Task statements were then generated from the data and organized into clusters, referred to here as categories.

Many authors have commented on the importance of indicating the purpose of the intended job analysis before beginning data collection methods (Brannick & Levine, 2002; Gael, 1983; McCormick, 1979). The purpose of the job analysis of the IC Facilitator was to specify the tasks, knowledge, skills, abilities and attributes, and performance standards associated with the job using information directly obtained from facilitators in the role, in addition a content analysis of IC literature and training materials. Conclusions drawn from the job analysis may inform training, selection, or job redesign in the future, although these uses will not be emphasized as the primary purposes of this analysis.

Content Analysis. The first step in the job analysis was to conduct a review of the IC literature in order to gather information about the knowledge, skills, abilities, beliefs, tasks, materials, performance standards and outputs that make up the job of the IC Facilitator. A content analysis was conducted of the available materials about IC facilitation, including training manuals and IC Literature. A preliminary list of tasks was generated from these materials, though Gael (1983) cautioned that the content analysis may not reveal the full range of work activities. This general list of IC Facilitator tasks informed later steps in the job analysis, including the creation of the interview protocol and the categorization of statements made by facilitators. In addition to reviewing all available materials about IC Facilitators, I discussed the expectations and required tasks of the job with program developers and trainers, a step that McCormick calls a Technical Conference (1979). The program developers supplied a copy of the Instructional Consultation Manual (Gravois, Rosenfield, &

Gickling, 2002) for review. I also reviewed Rosenfield and Gravois' (1996)

Instructional Consultation Teams: Collaborating for Change.

Interview Protocol. Next, based on the content analysis, a semi-structure interview protocol was developed. The protocol was reviewed by IC staff and members of the thesis committee. A copy of the interview protocol used in two pilot interviews is present in Appendix B. The revised interview protocol can be found in Appendix C. General questions in each topic area are based on Fine and Cronshaw's (1999) focus group techniques for Functional Job Analysis.

The original interview protocol (Appendix B) was adjusted after two 'pilot' interviews were completed. Initially, facilitators were asked to give estimates of time spent engaged in several activities. After conducting the first and second interviews, these questions were eliminated. Time spent engaged in certain tasks was outside the scope of the research questions. The final protocol, which was used with Facilitators three to ten, can be found in Appendix C

Participants.

Selection of participants. I contacted Todd Gravois, President of ICAT Resources, via email to obtain contact information for the IC Facilitators who are currently facilitating school teams across the country. At the time of the study, there were 300 schools located in 8 states using IC Teams. Dr. Gravois' files were organized by school name in spreadsheet format. I created a table of 50 random numbers and asked Dr. Gravois to send me the contact information for the facilitators whose school name/row number corresponded to the number from the random number table.

I invited facilitators to participate via individual emails that included a link to the IRB approved consent information and to a SurveyMonkey survey. Facilitators were asked to click on the survey link in order to read the consent information. If they agreed to participate, facilitators were asked to click an item stating they had given consent and to type their name and date. I checked the SurveyMonkey site daily and contacted facilitators again by email when they agreed to participate in order to schedule the phone interviews. The invitation email, Informed Consent form, and SurveyMonkey survey can be found in Appendices D, E, and F, respectively. I sent additional emails to the next facilitators on the list when an individual declined to participate or when no response was given after several days. I continued this process until I had consent from 12 facilitators and 12 interviews were scheduled. A total of 37 facilitators were contacted via email in order to obtain consent from 12 participants—a 32% consent rate. The information that was collected includes a limited number of statements from the interview with facilitator 12 due to the poor quality of the audio recording, despite the use of technology that was similar to that that had been successful in recording another interview.

Participant Characteristics. The participants in this study were 12 IC facilitators employed in school districts around the country. Table 1 shows characteristics and contextual information of the participating facilitators. The majority of the facilitators who volunteered to participate were women. Participants had with a range of experience in the facilitator role. Four facilitators reported five or more years of experience. Two facilitators reported two years of experience and three reported three years of experience. Only one of the facilitators interviewed was in the

first year of the role. Facilitators reported that they worked at 1 or 2 sites, with approximately equal numbers of facilitators in each group. Facilitators interviewed reported a variety of prior professional roles, including special education teachers, reading specialists, a school counselor, a principal, and other teaching roles. At least 5 facilitators worked in elementary schools. Two worked in middle schools and one worked in a high school. One facilitator's placement was in a kindergarten through grade 12 school. Data about grade levels was not available for three facilitators.

Procedures

I called each facilitator at the agreed-upon time to complete the semi-structured interview. A cell phone with a speakerphone feature was used for each interview. Interviews were audio-recorded using a digital recorder in 10 instances and 2 interviews were recorded using a audio-recording feature laptop. At the beginning of each call, facilitators were reminded that the interview was audio recorded and were asked to confirm that they consented to the audio recording. A brief explanation about the purpose of the research was provided, along with an overview of the structure of the interview questions, which progressed from general to more specific.

At the beginning of each section of questions, facilitators were informed that the following questions pertained to a specific type of job information, such as tasks, performance standards, knowledge, and other. Facilitators had the opportunity to answer the open-ended questions and to provide examples or other information. I also asked follow-up questions and engaged in some discussion about various answers, in addition to the structured questions that were asked. As stated by

McCormick (1979), semi-structured interviews are generally the most appropriate interview technique for job analyses. At the end of each interview, facilitators were asked if there were additional information that they would like to share in order for the interviewer to have a good understanding of their job. Facilitators were encouraged to send an email should any additional information come to mind; however, none of the 12 facilitators emailed supplemental information.

In general, interviews were completed in approximately one hour; however, there was variation in the length of the interviews, ranging from 45 minutes to 1 hour 30 minutes. The variation in length may have affected the amount of information gathered from individual respondents. Some facilitators indicated that they could only spend a designated amount of time on the call, thus limiting our interaction to one hour. In other cases, facilitators gave answers of varying length and depth. Some facilitators answered the questions asked with brief examples, while others shared in-depth anecdotes and explanations of their daily experiences.

Table 1.

Facilitator's Relevant Contextual Factors

Facilitator	Role(s)	# of teams/sites	Years in Role/Phase of Implementation	Prior Role	Culture/other imp issues
1	Half time facilitator & Half time principal & Grant writing duties	2	7-8 years	Principal	Elementary schools; issue of travel time; issues with others' perception of her role as non-evaluative as facilitator because of role as principal
2	Facilitator	2	5 years	Special education teacher	Elementary schools (grades k-2 & 3-5); Small schools; did training twice
3	Reading Specialist & Facilitator	1	2 years; not sure which phase	Reading specialist	Staff was 'reluctant' at first. starting to see attitude change; no coverage provided
4	Facilitator at two schools (was one large 678 school) then split to 5-6 and 7-8)	2	2 years	Taught middle school study skills	new school opened mid-year and 6-7-8 school was split into two
5	Full time Facilitator & District trainer for alternative state assessment	2	1(schools are in second year, but this is the facilitator's first year)	Special education teacher- had resource room and some students who we in self contained classroom	High school & k-12 rural school; b
6	Facilitator in 2 elementary school	2	4 years/phase 3	Special education teacher	k-5 schools; 2.5 days in each; must provide coverage 1 full day a week

Facilitator	Role(s)	# of teams/sites	Years in Role/Phase of Implementation	Prior Role	Culture/other imp issues
7	Full time elementary Counselor plus Facilitator	1	5-6 years	Counselor	Another duty added to counselor role; also involved in 'screening' meetings
8	80% IC Facilitator & 20% RTI Facilitator	1	3rd year as facilitator in this school. 6th yr total.	Resource teacher for reading & math for k-6 (special education teacher)	RTI at school; budget issues; School had IC a few years back and restarted team 3 years ago.
9	75% Facilitator & 25% Special educator(coordinator of accommodations)	1	6 years	Special Education Teacher	budget; RTI; 2 facilitators in that school- other is school psych; intended to become principal but now wants to stay in this role
10	50% facilitator; 50% special ed case manager and resource teacher	1	3rd year of implementation	<i>Buddy</i> (team member with additional training) for 3 yrs; Resource teacher	middle school; RTI
11	50% facilitator and 50% reading specialist	1	5	Reading specialist	ELL testing; district provides subs; conflicting roles that are merging
12		2	7		

Data Analysis

Transcriptions. Two interviews were transcribed in full. The remaining interviews were transcribed; however interview questions were abbreviated and irrelevant statements, such as small talk, interruptions or other comments were omitted. Statements regarding tasks, knowledge, skills, abilities, beliefs, performance standards, and relevant contextual information were highlighted in the transcribed text and compiled into a list of task (and other) statements. Fine and Cronshaw (1999) recommend that workers' responses be recorded exactly as offered, with only minor edits to punctuation and other surface or grammatical errors when organizing the data.

Task Lists. Statements were typed into tables for each facilitator. See Appendix G for a sample of one statement list. Facilitator 3's list of statements was used as the base. This list was chosen because it was the first transcription of the interviews that used the revised protocol. Additional task lists were compared to Facilitator 3's list. When statements or items were repeated by a subsequent facilitator, that facilitator's number was placed in a column next to the original statement. Unique statements were added to the list. This process was repeated for the remaining facilitator statement lists. At this stage, nuances and variations in statements were preserved and only those statements that were clearly duplicates were tallied together. After all interviews were reviewed, the number of facilitators who endorsed each statement was tallied.

The statements were separated into categories. These decisions were informed by the literature review, content of the statement, and the questions that elicited the responses. Categories were reviewed and subcategories were created (with guidance

from a program developer/committee member, Sylvia Rosenfield, PhD. Fine and Cronshaw (1999) reported that workers are likely to offer broad subject categories when asked about the necessary knowledge, skills and abilities; therefore, clarifying follow-up questions may be helpful. Participants in this study also provided broad statement and follow-up questions were used frequently in the interviews.

Task and KSA statements were constructed using Fine and Cronshaw's (1999) and Gael's (1983) structures. Gael's task statements are simple sentences, including a subject, verb and immediate object. Fine and Cronshaw also used a similar verb (behavior)-object format. Authors warn that the verbs and behaviors used must be specific and clear, and verbs such as 'creates', 'makes' 'evaluates' and 'ensures' should not be used (Fine & Cronshaw, 1999; Gael, 1983). Gael provided several guidelines for task statements, noting that the statements should contain one action and one object, stand alone and be understood apart from other task statements, and use familiar and consistent wording. The analyst can also consider how the task statements could be used as the basis for rating scales (Gael, 1983). Following these rules, a final list was constructed.

Verification of Interview Data. After compiling the tables of statements by category and including examples, I emailed the 12 facilitators who were interviewed to invite them to provide feedback on the data. An Informed Consent letter was provided in the email and facilitators were asked to sign or type their name on the form and return it via email or letter post if they agreed to participate in this portion of the study. The Facilitator Feedback Form can be found in Appendix H. Facilitators were asked to review the general categories and specific statements. For

each category, they were asked to report any major inconsistencies or omissions and were asked for any comments. Three facilitators (25%) agreed to participate in the verification portion of the study.

Chapter 3: Results

In this chapter, the results from the content analysis and facilitator interviews are presented. Interview results are presented by category and specific examples of materials, beliefs, tasks, KSA statements, and performance standards will be given where appropriate. Environmental and contextual factors are also discussed. Finally, feedback from facilitators who participated in the verification process is included.

Content Analysis

The first step in the task analysis was a document review, also called a content analysis. According to Gael (1983), a document review can provide information about the general nature and scope of a job and the tasks that job incumbents likely undertake. The document review requires supplementation from interviews and other sources, as the content analysis of documents will not result in a complete task list.

Multiple documents were reviewed. First, the Rosenfield and Gravois (1996) chapter on change facilitators in *Instructional Consultation Teams: Collaboration for Change* was reviewed, as this book is the most comprehensive description of the core components of the IC Team innovation and the change process. The emphasis of the chapter is on the role of the building-level IC facilitator as it relates to the change process. Facilitators should engage in activities to manage the change process and move the innovation forward, though these tasks are different depending on the phase of implementation.

In general, the IC facilitator is responsible for initiating the process of the program, developing the team and delivery system, providing training, and coaching team members (Rosenfield & Gravois, 1996). As discussed in Chapter 1, Rosenfield

and Gravois (1996) outlined some facilitator skills drawn from audio-tapped logs. These skills can be found in Appendix A. In terms of knowledge, mastery of the content of the IC program and a general grasp of educational issues and educational content were deemed necessary. The authors also noted that a commitment to the assumptions underlying the program was reported in the recorded logs. As described in Chapter 1, Social-emotional skills were also considered vital in order to carry out the role of the facilitator.

Table 2 shows the general tasks and social-emotional skills that Rosenfield and Gravois outlined as necessary for the facilitator role. These tasks can be categorized into three groups: tasks facilitating the functioning of the team, assisting individual team members to function as case managers, and creating a favorable school environment.

Table 2

Rosenfield & Gravois' (1996) General Tasks and Social-Emotional Skills

Basic Facilitator Tasks	Socioemotional Skills of the Facilitator
<ul style="list-style-type: none"> • Diagnosing individuals • Diagnosing organizations • Managing/organizing • Training & coaching • Resource-bringing • Demonstrating 	<ul style="list-style-type: none"> • Understanding of group functioning • Skills in team facilitation • Build trust and confidence of participants • Confront to resolve conflicts • Provide appropriate support • Interpersonal ease in relating to others • Initiative-taking • Capacity to organize time, work, and activities

The definition of the role of the IC facilitator is described in the Instructional Consultation Teams Training Manual (Gravois, Rosenfield, & Gickling, 2007):

The IC Teams Facilitator:

- Receives advanced training and coaching in the IC Process
- Helps initiate and introduce the IC process into the school
- Provides support to students by supporting classroom teachers
- Supports the on-going training and development of the team
- Facilitates professional development for staff members

Other activities of the IC facilitator are determined by the changing concerns that they and the team face as they move through phases of implementation.

According to Rosenfield and Gravois, time, stress, and administrative support are likely to be concerns with which the facilitators will need to cope. Tasks related to these concerns include communicating with administrators, arranging for professional support, developing a personal support network, setting priorities, scheduling and planning. Program developers also expect that facilitators will engage in training and will receive training and support from their systems facilitator.

A document from the IC Facilitator Training Manual (Gravois et al., 2007), in Appendix I, also outlines expected tasks and skills for the facilitator role. These tasks are based on those outlined by Rosenfield & Gravois (1996) and are summarized in Table 2.

Table 3

IC Facilitator Roles, Functions and Activities from the Facilitator Training Manual

IC Roles, Functions, and Activities	
Role & Function	Activities
Help initiate and introduce IC process to school	Plan IC Team Meetings
Develop team and delivery system	Conduct IC Team Meetings
Provide ongoing training to develop members' skills	Coach Team members
Coach individual team members in IC Process	Case consulting
Work with principal and key staff to integrate IC into school functioning	Receive External support
	Consult with principal
	Share information with Staff
	Assist in program evaluation

Taken together, the IC Facilitator Training Manual (Gravois, Rosenfield, & Gickling, 2007), the IC Teams Training Manual (Gravois, Rosenfield, & Gickling 2002) and the Rosenfield and Gravois (1996) book create a list of expected facilitator tasks, knowledge and skills that include introducing the IC teams process, developing the team to deliver the innovation, planning, coaching/training, providing professional development, engaging in case management, and evaluating the organization, team, and the innovation.

Interview Results

The content analysis informed the creation and adjustment of the interview protocol and provided context for the definition and categorization of task statements. After the content analysis was completed, interviews were conducted and transcribed, as described in Chapter 2.

First, materials, tools and equipment used on the job are also described. Tasks, KSAs, Performance Standards and Beliefs are presented. Tables in each section of tasks, KASs, Performance Standards and Beliefs display the statement categories, subcategories and examples drawn from the interviews. A frequency count is included to show how many facilitators endorsed each subcategory. A supplementary analysis is presented on the environmental and contextual information about the participants.

Facilitators provided specific examples that were often variations of similar, more general statements. Statements that were variations of the same theme were condensed into the categories and subcategories presented. The inclusion of the examples allowed for similar statements to be collapsed while preserving the nuanced meaning in the varied ways individuals described their jobs. Many of the items in Tables 6 through 20 include several examples that were drawn from the interviews. Note that information under the Knowledge, Skills, and Abilities and Attitudes categories were drawn from the specific answers provided to questions about the knowledge, skills, and abilities requires for the facilitator job. While information provided in other sections of the interview can also be used to infer knowledge, skills

and abilities, the information in the tables reflects the facilitators' perspectives on what is important or salient for their work.

Materials. Facilitators were asked about the materials, equipment, and tools that they use on the job (see Table 4). Facilitators reported these items in general terms. For instance, several facilitators reported that they use IC Manuals and IC Materials. However, specific information about the IC Materials used is not clear from the data collected.

Table 4

Number of Facilitators who Reported Use of Materials, Equipment, and Tools

Materials, Equipment, & Tools	Number of Facilitators
Computer	11
IC Manuals/Binder/Spiral Books	7
IC Materials	6
IC-Specific Forms (e.g., Student Documentation Form (SDF), Systems Tracking Form)	5
Office Supplies (e.g., pens, paper, sticky notes, files, folder, calendars, bags)	5
ICAT Tools (website)	3
Projector	3
General Assessment (e.g., Developmental Reading Assessments (DRA), forms for baseline) & Intervention Materials	3
Whiteboard/Smartboard	3
Assessment and Intervention Forms/Graphs/Tracking Tools	2
Books for Assessment and Intervention Ideas	2
Instructional Materials/Grade-leveled books	2
Copy Machine	2

Table 5

Materials Reported by Individual Facilitators

Materials	
Other people	Video Camera
Time Logs	Tape Recorder
Online Survey	Power Point
Websites	
Newsletters	Internet
Letter-cutting Machine	Sub-line (to call for substitute teachers)
Bulletin Board	

Several facilitators reported using many IC-specific materials, including the IC Manuals/Binders, IC forms, such as Student Documentation Forms (SDFs), and ICAT tools (data management, professional development and program evaluation website). General office supplies and office equipment (copy machines, projectors, etc.) were also used by most facilitators. A review of the tasks, especially the organizational/clerical tasks reported by facilitators, suggests that several additional materials are likely used, but only those materials specifically stated by the facilitators were included in Table 4. Table 5 describes materials, tools, and equipment that were reported by only one facilitator. Given the open-ended and general nature of this interview question, the number of reporting facilitators may be an underestimate and the scope of the items used may be limited.

Tasks. Task statements were combined into categories, where appropriate. Each category is described below and examples are given where appropriate. Categories and subcategories of task and other statements are presented in tables for each section.

Change Process. Throughout the interview, facilitators reported tasks and knowledge specific to the change process. These items were categorized together because change is a major component of the IC program according to Rosenfield and Gravois (1996). Categories are presented in Table 6. The materials used to train IC facilitators and teams emphasizes the change process and the role that facilitator plays as a change agent. According to information from the interviews, facilitators must understand the change process in order to carry out their role. They must also facilitate change. Facilitators reported that they advocate, represent, and support IC

as a cheerleader for the process and by addressing concerns of staff regarding the process and time of taking cases.

Table 6

Frequency of Change Process Statements

Change Process	Frequency of Response
Understand the Change Process	3
Facilitate Change for IC <i>e.g., Advocate, represent, and support IC (i.e. be a cheerleader; address concerns about time it takes to take a case)</i>	5

Conflict. Given the facilitators' role as a team leader and the role that the change process plays in implementing the IC program, it was not a surprise to hear facilitators report carrying out conflict-related tasks as a part of their role. Specifically, facilitators reported that they manage conflict between several parties, as shown in Table 7. Facilitators manage conflict between programs in their schools, such as RTI vs. IC. They also manage conflict between case managers and consultees. For example, facilitators may mediate when a teacher does not feel that a student made enough progress on the goals that the consultees and case manager defined. Facilitators also reported that they manage conflict between team members, such as addressing disagreements about meeting times. In addition to conflict mediation/management, facilitators reported that they must receive negative feedback about IC. Some facilitators said they must hear and deflect complaints and working to interpret negative reactions without taking them personally.

Table 7

Frequency of Conflict Statements

Conflict	Frequency of Response
Manage conflict between programs <i>e.g., Role of RTI and IC in the same school</i>	2
Manage conflict between Case Managers and Consultees <i>e.g., Mediate when teacher does not feel that student progress is enough</i>	2
Manage conflict between team members <i>e.g., Deal with pretty things such as disagreements such as meeting times</i>	1
Receive negative feedback re: IC <i>e.g., Hear/deflect complaints; do not interpret negative reactions personally</i>	3

Case Management. Case management referred to a group of tasks explicitly mentioned universally by the facilitators interviewed. All facilitators reported tasks related to case management in some way. Case management in the context of IC Teams is a stage-based, collaborative, problem-solving process in which two professionals work together to address student academic and/or behavioral concerns in the classroom (Rosenfield & Gravois, 1996). According to facilitators in the study, they engage in case management and the problem-solving process. Many facilitators reported that they engage in case management but they did not describe *every* step in that process. Table 8 details facilitators' case management tasks. Specifically, facilitators collect data, meet with consultees, may engage in small group cases, sit with teachers during snapshots (assessments of student skills/knowledge), help to implement strategies (interventions), and introduce strategy information and

resources to the teachers. Interpersonal tasks were reported as relevant to the case management tasks. For example, facilitators said that they work to lower consultees' anxiety, keep conversations congruent, understand teacher concerns, and develop rapport with consultees. Finally, communication with consultees emerged as a task area that facilitators demonstrate in their role. Facilitators used a variety of modalities to communicate, such as informal meetings, email, and phone calls.

Table 8

Frequency of Case Management Statements

Case Management	Frequency of Response
Engage in Case Management <i>e.g., Engage in case management with teachers, principal or others as consultee</i>	12
Problem Solving Process <i>e.g., Collect data; meet with consultee; engage in small group cases; provide feedback to teachers; sit with teacher during snapshot; help to implement strategy; bring in strategy resources/info</i>	7
Interpersonal tasks in Case Management <i>e.g., Help lower consultee's anxiety; keep conversations congruent; connect with teacher; understand where teacher is with their concern; develop rapport with teachers (consultees)</i>	2
Communication with Consultee <i>e.g., check in with consultee informally via phone, email, in person</i>	9

Team Business. Team business tasks made up a large portion of the statements made by facilitators in the interviews; 13 categories were created to represent these items and they are presented in Table 9.

Initiation and implementation. In general, facilitators oversee all tasks related to IC. They initiate and implement the IC Team and accomplish this in a variety of ways. Examples of initiation tasks include choosing team members that they know will be supportive, bringing on more team members to replace ones that left the team, and meeting with prospective team members before they join.

Facilitators also reported dissemination activities, saying that they encourage teachers (non-team members) to utilize the IC team. Some reported that they try to get as many teachers as possible to try IC, while others reported that they specifically try to get teachers who have had a bad experience with the process to try it again. In general it appeared that facilitators took on a role in which they try to encourage more wide-spread use of the team in their schools.

Work with team members. Facilitators also reported many ways in which they work with team members. They noted that they build confidence of their team members as part of their role. Facilitators may not all engage in these specific types of assessment, but many reported that assessment was a part of their role. They assess the team and team members and gave the following illustrations of that task: ask team members what their needs are, administer self-assessments to members, engage in temperature taking, conduct needs assessments, talk with team about how they feel in order to inform planning, get feedback from team members about what they want to work on, and ask team to reflect. One facilitator asked the team to complete reflection worksheets.

Along with assessment tasks, facilitators set goals and expectations for the team. Some reported using input from the team or information from needs assessments to inform their goal setting activities.

According to the interview data, facilitators oversee team members' cases. Many variations and examples were documented (see Table 9). Some examples include: sending reminders to case managers about their cases, working with case managers through each step of the consultation process, and making sure cases move forward. In some instances facilitators covered classes so that case managers and consultees could find time to meet to work on a case. This type of class coverage, when specifically related to IC and the facilitation of meeting for cases was considered a task in and of itself, as opposed to 'emergency' situations that required class coverage, which are described below.

Team meetings. In addition to working with individual team members, facilitators also attended and facilitated regular team meetings. Specifically, some reported that they introduce topics and activities during meetings, address to the goals of the meeting, set the next meeting agenda with the team, process and reflect on the meeting with a team member, and are responsible for making sure others stayed on task.

Some facilitators acted as the Systems Manager. The primary function of the systems manager is to collect new requests for assistance and to maintain records of case data, such as stage of the problem-solving process and dates of meetings between case managers and consultees (Rosenfield & Gravois, 1996). The systems manager is intended to be a role for a team member to take on during meetings.

Program developers and trainers indicate that the role may be adapted by facilitators to meet the needs of their particular team (Rosenfield & Gravois, 1996). For example the role may be permanently assigned or may rotate among members. However, the tasks associated with the systems manager role are not included in the IC training material as an expected part of the facilitator role.

Generally, these facilitators took on the task of collecting data on others' cases. Some did so on paper, others entered the data directly into ICAT tools, the online system for data collection, while another asked team members to complete a checklist of data that was collected and later entered into ICAT tools.

Maintaining the meeting climate was also found to be a group of tasks that falls under the facilitator role. Some examples of this task category include keeping things fresh, keeping up the energy during the meeting, creating an open forum, encouraging others to give input, and give others the opportunity for leadership roles during the meeting. However, facilitators did not describe *how* they go about accomplishing these items. This group of tasks, while hard to define without the use of examples, appears to imply that the facilitator has a responsibility to manage or address the atmosphere of the team and the dynamics among members.

Facilitators reported that they distribute new cases during regular IC team meetings, though the methods that are used appear to vary. Some facilitators simply reported that they hand out new cases. Others use some means to determine difficulty of the case and then distribute them, noting that the most challenging cases are often taken by the facilitator. This task was also accomplished by asking for volunteers.

Training. One of the larger tasks of the facilitator is to provide training. Because one of the purposes of the regular team meeting, according to Rosenfield and Gravois (1996) is training, this task was included in the Team Business section. Specifically, some facilitators reported that they conduct case reviews, provide practice opportunities, and review stages of the IC process during meetings. There are several other specific training tasks that are described in the section called Training (see Table 11).

Table 9

Frequency of Team Business Statements

Team Business	Frequency of Response
Oversee all tasks related to IC	2
Set up/ build team <i>e.g., Choose team members that you know will be supportive; bring on new team members when others leave; meet with people before they join the team</i>	5
Build confidence of team members	2
Assess team and team members <i>e.g., Ask team what their needs are; administer self-assessment to team; engage in temperature-taking; conduct need assessment; talk with team about how they feel to inform planning; get feedback from team about what they want to work on; ask team to complete reflection sheet</i>	8
Encourage teachers to utilize the IC team <i>e.g., Encourage teachers who have had a bad experience with IC to take another case; get as many teachers as I can involved with IC; get as many teachers as I can to have a positive experience with IC</i>	2
Set goals and expectations for team (i.e. with input from team, based on needs assess, etc)	7
Cover class so teacher/case manager can meet	4

Oversee team members' cases <i>e.g., Send reminders to case managers to make sure they don't skip steps of the process; be aware of all the cases that the team has; touch base with case managers to see if they need anything for the week; collect data on how case managers are progressing; remind members that they are still doing cases; track cases; constantly work/nurture the steps of the case for case manager; encourage team members; make sure cases are moving forward (remind case managers of the timeline goals)</i>	8
Attend and Facilitate IC Meetings <i>e.g., Make sure everyone stays on track; address goals of the meeting; introduce topics/activities; set next agenda; process/reflect with team member after meeting</i>	11
Fulfill systems manager role <i>e.g., Use ICAT tools to update cases; ask team members to fill out check sheet of info for case updates to collect during meeting; take down case update info on paper</i>	9
Maintain meeting climate <i>e.g., Keep things fresh; keep energy up; create an open forum; encourage others to provide input; give members opportunities for leadership roles in meeting</i>	3
Provide training during meeting <i>e.g., Conduct case reviews; provide practice opportunities; review stages of process</i>	8
Distribute new cases <i>e.g., Determine which cases are tougher and take those myself; ask for volunteers for cases, hand out new cases</i>	6

Organizational/Clerical Tasks. The Organizational/Clerical tasks of the IC Facilitator were broken into nine categories. Many variations and examples of each general task were described by those interviewed. The examples for this section can be seen in Table 10. Generally speaking, task areas described by facilitators have corresponding organizational/clerical tasks such as planning, preparing, or creating materials associated with them. Facilitators engaged in specific activities in order to

create materials for cases for which they were case manager. Many tasks related to preparing for team meetings and training, including preparing for coaching of team members. Facilitators reported many other specific examples of paperwork and administrative tasks that were required in their role. Managing schedules, communicating with several parties (e.g., team, consultees, and staff), and providing information to staff were task areas present in the data. On top of the organizational and clerical tasks required for the building-level facilitator role, some facilitators engaged in similar tasks that related to IC Program Development, or systems- or district-level roles. Other IC Program Development tasks are described in more detail below.

Table 10

Frequency of Organizational/Clerical Statements

Organizational/Clerical Tasks	Frequency of Response
Create materials for cases <i>e.g., Create intervention materials such as flashcards, games, etc.; develop information materials for teachers; create scoring rubrics; gather intervention materials; find and organize assessment materials for my cases</i>	7
Create materials for team training <i>e.g., Create/edit videos of my cases for training; make up fake cases for training; create power points; make handouts of math assessments; make binders of resources for team members; create review games, write scripts; create visuals for training; make info sheets; write checklists for stages; write list of operational definitions; make copies for the meeting(case review documents, SDF's, etc); make sure forms are available; look for materials for assessment/intervention in the resources that have been collected by team; check goals in order to plan meetings; ask team to assemble binder of resources for their use</i>	10
Preparing for team meetings and trainings	11

e.g., Write meeting plan; make notes for meeting; prepare for meeting; create meeting schedule, organize materials for meeting; differentiate training; plan for half- and full-day trainings; write agendas for meetings; invite students/teachers for training meetings; copy materials; order lunch for team (for meetings); call substitutes to cover for team members during meetings/trainings; divvy up training tasks among team member; in the summer, plan the agenda for meetings/trainings for the year; prepare for meetings with consultees

Communication (with team, consultees, staff, etc.) 2
e.g., Send out online surveys to get information from staff about professional development needs or meeting times; communicate with team members about their schedule for the week;

Prepare for Coaching 2
e.g., Prepare for coaching meetings; print out tracking forms and check dates with team members

Complete paperwork and administrative tasks 8
e.g., Log hours; update paperwork after meeting with a teacher; maintain files on cases; maintain notebook for record keeping at meetings; keep a folder for each case I am working on; keep records on cases; read emails; travel between buildings; manage clerical/admin. tasks; make sure IC data is available for 'screening meeting' (special education process if child is referred; cover classes for teachers to encourage them to be a consultee

Providing information to staff 4
e.g., Write blurb for monthly parent newsletter; maintain IC bulletin board; prepare presentations for staff; create graphs for staff newsletter; maintain whiteboard with goal attainment info and steps of the process

Manage schedules 9
e.g., Keep schedule of appointments; determine which teachers need to hear from me today; manage team's schedule; review appointments for the day; coordinate schedules for subs; coordinate meeting times for members I am coaching; make time in schedule to meet with teachers for my cases; keep lists meetings I need to get ready for; adjust meeting schedules if something comes up; set up screening meeting (special education process) if child is not making progress in IC case

IC Program Development Tasks (district level) 3

e.g., Prepare for district meetings; email to set up tech support dates; set county-wide meeting agenda

Training. This represents a significant category of tasks that were carried out by facilitators in this study. While statements were collapsed into only five general task categories, each category contains many examples of the specific strategies, methods, tools and activities used to provide training to various recipients. These examples are listed in detail in Table 11. Training was delivered to multiple groups, in multiple ways. Facilitators provided professional development about IC to staff and faculty, and this category included items such as presentations at faculty meetings, creating a staff newsletter about IC, and talking to staff about IC. Facilitators coached and supported team members through cases. They trained new team members and provided on-going training to current members. It appears that the main distinction between facilitators' perception of coaching versus training was that coaching was a more individualized interaction, while training was provided to the team or subsections of the team (i.e., new or experienced members). A category was also dedicated to the ongoing training provided to team-members in regular meetings, such as those held each week and the regular half- or full-day training sessions described by most facilitators.

Table 11

Frequency of Training Statements

Training	Frequency of Response
Provide professional development to staff/faculty	9

e.g., Attend monthly staff meeting; give updates to staff re: IC; clarify what IC is to others, create monthly newsletter for faculty, plan and provide professional development via presentations to staff; communicate with staff about IC; let people know what we do; get input from team, principal, and others for presentations; talk to staff and help them to see problems in a different way

Coach/support members through cases

11

e.g., Coach team members through practice cases, get members to start cases; encourage team members to have be observe their meetings with consultees; provide non-evaluative feedback; help others reflect; review with case managers before they meet with teachers; help case managers grow in their skills; process with case managers after they have met with teachers

Train new team members

6

e.g., Partner up experienced and new team members; meet weekly with new case managers, provide half- and full-day training to new team members, do training sessions to get new members up to speed with experienced members; plan training around rotating team membership; ask veteran members to observe and mentor new members

Provide on-going team-member training (content)

9

e.g., Review and practice skills, teach Instructional assessment with students; teach communication skills; instruct team members to use forms/resources; provide training for reading cases; teach steps of the process; teach principals of learning; teach team how to do whole-class word search; teach from ICAT books

Provide on-going team-member training in weekly meetings, and half/full day trainings (process)

11

e.g., Help others to reflect (i.e. on skills, process, meetings, etc); ask veteran members to mentor and observe new members; as team members to partner up to practice skills and share ideas; process sessions with consultants after they meet with teachers; complete/review SDF's as training activity; answer questions during case reviews; use modeling, role-plays, guided practice and direct instruction to teach skills; engage in individual training; ask members to share cases; ask for input/concerns/issues to inform training; review student work samples; provide feedback to team members; come up with new ways to review old skills; have team members provide training; share audio recordings of my meetings with teachers; team members observe me as case manager; meet with case managers when they start a new type of case

Facilitator Training. In addition to providing training to others, facilitator received their own initial and continued training and professional development. Facilitators attended and participated in facilitator trainings and meetings, such as networking meetings, state-, county- or district-level meetings, session trainings. Some also engaged in follow-up with trainers to address questions. Facilitators also reported that they engage in peer networking and this appears to have taken place in many ways and variations, as seen in Table 12. Peer networking included opportunities to receive and provide support to other facilitators. Facilitators also engaged in other professional development activities to build their own skills as a facilitator. Some of these activities may not have been directly related to IC, such as computer trainings and education-related workshops.

Table 12

Frequency of Facilitator Training Statements

Facilitator Training	Frequency of Response
Attend and participate in facilitator trainings and meetings <i>e.g., Attend networking meetings; attend state level meetings, county-wide meetings, district meetings, etc; attend session training; follow up with trainers with questions</i>	12
Engage in Peer Networking <i>e.g., Act as a mentor for other facilitators in the county; help other facilitators with questions; provide feedback to others facilitators about their skills; share knowledge and info with other facilitators; practice skills with other facilitators; support other facilitators; collaborate with other facilitators about my own skills and questions; receive online coaching; practice assessment skills with other facilitators; receive feedback about my facilitation from others; talk to other facilitators about how they conduct training and discuss what works</i>	8
Engage in other professional development activities to build own skills as a facilitator.	9

e.g., Participate in training for making charts and graphs on computer; participate in Professional Learning Community and attend meetings about math facts, working memory, repetition with grade level tea; further my training as a facilitator; engage in book study (IC book; communicate with my buddy; receive tech support; participate in professional development for myself in case management and problem solving; attend teacher trainings so I have a knowledge of curriculum; receive small-group tech training as follow-up to session training; look for resources/info online (e.g., ICAT, university websites, searches for info on learning, behavior); reflect

Administrative Contact. For the first two interviews, two facilitators were asked specifically if they engage in administrative consultation; however this question was eliminated when the interview protocol was changed. As described in Chapter 2, a section regarding time spent in a variety of activities was removed from the interview protocol. Even without the specific question, several facilitators reported that they engage in contact with school administrators as a part of their role and these tasks are displayed in Table 13. Some facilitators delivered presentations to principals or their district’s school board. Other tasks generally fell in the category of communicating with the administrator, such as providing the principal with one’s professional goals, updating the principal about the IC team, and discussing innovation issues like sustainability and expectations.

Table 13.

Frequency of Administrative Contact Statements

Administrative Contact	Frequency of Response
Communicate with administrator <i>e.g., Provide principal with my goals, give updates about IC, discuss sustainability/expectations</i>	9
Present to principals/school board	4

Additional School Responsibilities and “Extra Hand” Activities. During the interviews, several facilitators mentioned that they engage in tasks that are outside of their role as an IC facilitator. These extraneous tasks were grouped into two categories: School Responsibilities and “Extra Hands” (see Table 14). The school responsibilities are duties that the staff member fulfills on a regular basis as a part of their role as a school employee. These are not emergency situations. Examples of such tasks included participation on other school teams, conducting standardized testing, completing assigned duties (cafeteria, bus, after-school duty), presenting to staff on non-IC topics, and participating in special school events. “Extra Hand” tasks are those in which the facilitator is called upon to fill-in during an ‘emergency’ situation, in which a person is needed regardless of their other role or specific skill set. Examples included covering a class when a teacher went home ill.

Table 14.

Frequency of Additional School Responsibilities and “Extra Hand” Statements

Additional School Responsibilities and “Extra Hand” Activities	Frequency of Response
Attend to other school tasks and other school responsibilities <i>e.g., Participate on other teams, conduct standardized testing, complete assigned duties (lunch, etc); present to staff on non-IC topics; attend and participate in special events</i>	7
Act as an extra hand	5

IC Program Development. A small number of facilitators interviewed were engaged in activities that may be seen as outside the scope of the building-level facilitator. These tasks are presented in Table 15. Some facilitators reported that they coached other facilitators online, which is a process in which a new facilitator receives feedback and support from a more experienced facilitator. Some individuals

also reported that they have developed a support network of facilitators in their districts, implying that have some kind of implicit or explicit leadership role within their IC community. In addition, a few facilitators act as a trainer of others in IC. Many examples were provided to illustrate this, such as participating in Session trainings, providing tech support, and training new team members from other schools at district -wide training events. Participation in activities in this category is expected to be restricted to a minority of facilitators and may be limited to those with the interest and experience to pursue IC facilitator role at a more systemic level.

Table 15

Frequency of IC Program Development Statements

IC Program Development	Frequency of Response
Coach others online	4
Develop support network in district	2
Act as a trainer for others in IC <i>e.g., Work with coordinator to help conduct Session training; provide tech support; plan county-wide meetings; attend session training; coordinate county-wide facilitators; help conduct new member training with coordinator; train new team members from other teams in count as a part of county-wide new member training; plan tech support for the district; attend training at ICAT Center with coordinator; shadow coordinate at new member trainings; work toward becoming a trainer of the process; lead sessions for case managers at district meetings; act as a mentor for other facilitators in the county</i>	4

Performance Standards. Facilitators responded to interview questions about performance standards. These included “What standards do you work toward—yours and your organization’s? What tools are used to evaluate your performance? Do you receive any supervision?” Resulting statements are presented in Table 16.

Program Evaluation. Most of the statements made in response to performance standard questions related to the Level of Implementation (LOI) scale. The LOI measures implementation of the IC Team innovation (Rosenfield & Gravois, 1996). The evaluation process includes interviews, record reviews, and observation. According to Rosenfield and Gravois, the facilitators are not necessarily responsible for conducting the LOI evaluation in their own schools. Nevertheless, the facilitator is expected to assist by collaborating with district-level personnel to coordinate the evaluation and to utilize the resulting data. Based on the interview data, facilitators reported that they complete the LOI and do so by interviewing IC team members at other schools, participating as interviewees, and coordinating interviews. Facilitators also reported that they review the LOI data to inform their goals and planning for other areas of their work. Use of ICAT tools (website) for data entry and feedback is a stand-alone activity, as well as a component necessary for completion of the LOI. This task is reflected in multiple categories— Performance Standards and Team Business

Other methods of evaluation of the facilitator. Facilitators also reported that they engage in evaluation of their performance through their various schools/districts processes. There is significant variation in the ways in which facilitators were evaluated and this is a reflection of the context— the variety of school districts/states/school buildings in which they work and the other role(s) that make up their employment.

Table 16

Frequency of Performance Standards Statements

Performance Standards	Frequency of Response
Complete LOI form <i>e.g., Interview IC Team at other schools, participate in interviews; coordinate interviews</i>	8
Review LOI data to inform team goals, planning	4
Use ICAT tools for data entry and feedback <i>e.g., Enter whole kindergarten class into ICAT tools; enter case data</i>	6
Engage in evaluation of my performance <i>e.g., Complete school's evaluation tool; receive summative evaluation at end of year from administration; participate in state evaluation system; meet with principal and instructional specialist about my work; get observed by principal; complete end of year reports; receive thanks for work as facilitator (an informal measure of progress; meet with district coordinator to discuss my performance; set goal based on IC implementation data; rate myself on performance objective for tech support; keep data on my professional goal</i>	7

Knowledge, Skills, Abilities, & Attributes. In the functional job analysis approach, workers are seen as whole persons, who accumulate knowledge, skills, and abilities in order to function in the job (Fine & Cronshaw, 1999). Knowledge describes the information and ideas that the job incumbents need in order to get their work done. Skills, ranging from simple to complex, are acquired competencies one must have in order to carry out tasks. Abilities are described by Fine and Cronshaw as related to how well a worker does or can do a task and can be expressed using adjectives or adverbs. Attributes in this study are defined as the personal characteristics that a worker feels he or she possesses that facilitate task completion

or knowledge/skill demonstration (Goldstein, Zedeck, & Schneider, 1993; Harvey, 1991).

The information compiled regarding the necessary knowledge, skills and abilities and attributes was drawn directly from answers given to the specific questions on those topics. While more information may be inferred from responses to other questions throughout the interview, the focus of this section is to understand the KSA's that are required, from the perspective of the facilitator. Taking only the explicit responses to KSA questions may have eliminated a layer of interpretation that would have been required had KSA statements been pulled from elsewhere. Some knowledge and skills are implied, by virtue of engaging in the tasks and activities reported by the facilitators in response to other questions. For example, some facilitators mentioned the use of copy machines when asked about materials and equipment used on the job. Some levels of skill and knowledge are necessary in order to use such equipment, but that is not discussed here.

Knowledge. Facilitators were asked “what do you need to know to do what you get paid for?” This question elicited some responses about skills and abilities in the first two interviews. In remaining interviews facilitators were told that the next questions would address skills and abilities, so that they would focus on knowledge in their answers. They provided several specific pieces of information in response to the knowledge question that were collapsed into five categories, which are displayed in Table 17. According to those interviewed, facilitators need to have knowledge of principals of learning and behavior, as they apply to both children and adults, best

practices in instruction, content/curriculum, IC process/philosophy, and the change process.

Table 17

Frequency of Knowledge Statements

Knowledge	Frequency of Response
Know best practices in instruction <i>e.g., Intervention strategies, etc.</i>	7
Know content/curriculum	4
Knowledge of IC process/philosophy <i>e.g., Problem solving process, training in IC, how to do IA</i>	2
Know the change process <i>e.g., How IC can work in your school, vision, direction ; know team dynamics</i>	4

Skills. Facilitators were asked “what skills/abilities do you need to apply your knowledge?” Two follow-up questions were also posed: “what skills do you think are critical for successful facilitation?” and “which critical skills are your best and which could benefit from more training?” Regarding skills, facilitators’ answers generally related to use of skills in five areas, shown in Table 18.

Table 18

Frequency of Skill Statements

Skills	Frequency of Response
Use communication skills <i>e.g., Paraphrase, summarize, ask clarifying questions</i>	8
Use Management skills <i>e.g., Time management, organizational skills, keep people on task, prioritize time</i>	4
Case management skills <i>e.g., Narrow down concerns, do assessments, interpret data</i>	4

Use interpersonal skills <i>e.g., Build relationships with staff</i>	5
Computer skills <i>e.g., Use ICAT tools, troubleshooting, general computer skills</i>	3

Facilitators reported that they use communication skills (e.g., paraphrase, summarize, ask clarifying questions) and management skills, such as manage/prioritize one's time and keep others on task. Using case management skills was also a large part of the role and examples included narrowing concerns, doing assessments, and interpreting case data. Facilitators also use interpersonal skills, in which they build relationships with staff, including team-members and others. Use of computer skills is also required and examples included having general computer and trouble-shooting skills and being able to use ICAT tools.

Abilities and Attributes. Abilities and Attributes were separated from skills and represent more personal characteristics that facilitators employ in order to do their work. See Table 19 for Ability and Attribute statements. Facilitators reported several examples of executive functioning skills, such as breaking things down into smaller parts, organizing tasks and materials, initiating tasks, being flexible and multi-tasking. This category was named executive functioning skills because it bore a striking resemblance to the types of activities described by researchers and practitioners as executive skills — the brain-based skills that people use to *execute* tasks (Dawson & Guare, 2009).

Facilitators also gave many examples of abilities and attributes that can be described as Interpersonal Skills, such as engaging in work with groups and people and different personalities, empathizing with others, empowering others, helping

others feel safe and certain, being able to ‘read’ other people, dealing with hard questions and attitudes of adults, and helping others to reflect.

Some of the abilities and attributes mentioned did not easily lend themselves to the task-statement format recommended in the job analysis literature. However, these examples were included under the category of Personal Attributes and they represent characteristics or ways of engaging in tasks that may be important to the role. Some facilitators described the need to be patient, take risks, and be firm but understanding and supportive in their role.

Table 19

Frequency of Ability & Attribute Statements

Abilities & Attributes	Frequency of Response
Executive functioning skills <i>e.g., Need to be able to break things down into smaller pieces; organize; be a self-starter; multi-task; be flexible, be able to see the bigger picture</i>	5
Interpersonal skills <i>e.g., Work with groups; work with people/different personalities; deal with different personalities; empathize with others; empower others that they can do it (the process); help people feel certain; help others to feel safe; be able to read other people; deal with hard questions and attitudes of adults; help others reflect on how they feel</i>	9
Personal attributes <i>e.g., Be patient; take risks; be firm but understanding and supportive</i>	3

Beliefs. Facilitators were asked “are there necessary beliefs or assumptions in order to be successful in your role? If so, what are they?” In general, facilitators reported beliefs and assumptions that fell into three categories, which are displayed in Table 20. Facilitators stated that they believe that IC is a good process. Variations of

that theme included comments such as facilitators must believe it can work, believe in the mission of IC, have a vision of how IC can work in their school, and have a commitment to following the process with integrity. According to responses to the question of necessary beliefs, facilitators feel they must believe in collaboration. Examples included believing that teachers can work together, and that facilitators should not let their own beliefs interfere when working with others. Some facilitators included that “no one is an expert” as a necessary belief. In the IC literature, this phrase communicates that, as the consultant, taking an expert-stance may not be effective in collaboration. Another necessary belief or assumption reported by facilitators is that they must assume children can learn, however noting that not all children learn in the same way or at the same rate.

Table 20

Frequency of Belief Statements

Beliefs	Frequency of Response
Assume children can learn, but not in the same way or at the same rate	6
Belief in Collaboration <i>e.g., Teachers can work together; no one is an expert; don't let own beliefs interfere when working with others</i>	4
Believe in IC as a good process <i>e.g., Believe it can work, believe in the mission; have a vision of how it can work; commitment to following the process with integrity</i>	6

Supplementary Analysis

Environmental and Contextual Factors. Contextual information was gathered about each facilitator from interview data. Some information was gathered through

explicit interview questions, such as previous job title and school climate. Other contextual factors, such as number of schools and years of experience were drawn from information throughout the interview. Table 3 shows the contextual information for each participating facilitator.

Facilitator Feedback

Three facilitators responded to the request for feedback on the summary of categories and examples drawn from the interviews. These facilitators will be referred to as Facilitators A, B, and C. See Appendix G for the Facilitator Feedback Form. Of the three respondents, one facilitator, Facilitator A, reported no major inconsistencies or omissions. Facilitators B and C suggested additions to several categories, which are displayed in Table 21. Suggested additions to the tasks generally were items that existed in other categories. For instance, Facilitator B suggested some organizational tasks that could be added to the Administrative Contact category. Similar organizational activities such as preparing for meetings are captured in the Organizational/clerical section.

Table 21

Facilitator Feedback

Category	Facilitator B	Facilitator C
Change Process	<i>Involving all service providers in the process</i>	
Beliefs		<i>I don't agree that no one is an expert. We routinely tell the classroom teacher that they are the expert when it comes to their grade level curriculum.</i>
Knowledge	<i>Ability to apply congruency in working with team members.</i>	
Skills	<i>Comfort with all types of cases – reading, math, writing, group and class, and behavior</i>	
Case Management	<i>Being strategic in carrying out the assessments</i>	<i>Whole-Class Cases</i>
Team Business		<i>Empower team members to spread goodwill about the process. Staff should hear it from team members not just the facilitator.</i> <i>Cases should be distributed by ability to meet and not by degree of difficulty. Facilitators shouldn't take all of the difficult cases. Everyone can learn from the difficult cases.</i> <i>The Systems Manager should be fulfilling the duties of that role, not the facilitator.</i>
Org./Clerical Tasks		<i>Maintain electronic copies of forms frequently used and keep in shared folder for all to access.</i>
Admin Contact	<i>Prepare agendas/materials for meeting with administration</i> <i>Keeping to schedule with admin meetings focus on just a few items.</i>	
Conflict	<i>Apply congruency and communication skills when dealing with conflict.</i>	

Chapter 4: Discussion

The purpose of the job analysis of the IC Facilitator was to specify the tasks, knowledge, skills, abilities and attributes, and performance standards associated with the job, using information from a content analysis of materials and statements directly obtained from facilitators in the role. Chapter 3 presented the detailed results of the content analysis and facilitator interviews. Chapter 4 draws conclusions from these findings in the context of the IC and leadership literature. Findings are discussed in the context of what is known about the IC facilitator job and what can be learned from this study. Limitations, implications, and directions for future research are also explored.

What do we know?

Comparisons of Interview Data to Content Analysis. In general, many of the task categories generated from facilitator interviews fell closely in line with the expectations of the facilitator role as outlined by the training materials and IC literature. Table 22 shows the roles, functions and activities of the IC Facilitator, as delineated in the IC Facilitator Training Manual (Gravois, Rosenfield & Gickling, 2002). Corresponding task categories generated by the interviews are presented next to the expected roles, functions, and activities from the training manual. Table 23 compares the Key Skills of the facilitator from Rosenfield & Gravois' book (1996).

Table 22.

Expected Roles, Functions, and Activities vs. Interview-Generated Tasks

Expected IC Roles, Functions, and Activities	Corresponding Interview-Generated Task Categories
Role & Function	
Help initiate and introduce IC process to school	Change Process; Team Business: Oversee all tasks related to IC
Develop team and delivery system	Team Business: Set up/build team
Provide ongoing training to develop members' skills	Training: Provide ongoing team member training (content and process)
Coach individual team members in IC Process	Training: Coach/support members through cases
Work with principal and key staff to integrate IC into school functioning	Admin Contact
Activities	
Plan IC Team Meetings	Organizational/Clerical: Prepare for team meetings and trainings
Conduct IC Team Meetings	Team Business: Attend and facilitate IC meetings
Coach Team members	Training: Coach/support members through cases
Case consulting	Case Management
Receive External support	Facilitator Training: Engage in peer networking
Consult with principal	Administrative Contact
Share information with Staff	Training: Provide professional development to staff/faculty
Assist in program evaluation	Performance Standards: Complete LOI

Table 23.

Key Facilitator Skills and Corresponding Interview Categories and Statements

Expected Key Facilitator Tasks and KSA Facilitator Tasks	Interview Generated Categories and Statements
Diagnosing Individuals	Team Business: Assess team and team members
Diagnosing Organizations	NA
Training	Training
Managing/controlling	Skills: Use Management Skills
Resource-bringing	Team Business: set up/build team; Case Management: Problem-Solving process; Admin. Contact: present to school board
Socioemotional Skills that Support Change	
Group Functioning	Team Business: Maintain meeting climate;
Trust/Rapport Building	Skills: Use Interpersonal Skills;
Support	Facilitator Training: Engage in Peer Networking;
Confrontation	Conflict
Conflict Mediation	Conflict: Manage conflict between programs; Manage conflict between Case Managers and Consultees; Manage conflict between team members
Confidence Building	Abilities/Attributes: Interpersonal Skills; Team Business: Build confidence of team members
Collaboration	Beliefs: Belief in collaboration; Case Management
Interpersonal Skills	
Interpersonal Ease	Abilities/Attributes: Interpersonal Skills
Administrative/Organizational Skills	Organizational/Clerical Tasks
Initiative-Taking	Abilities/Attributes: Executive Functioning Skills
Knowledge	
Education-general	Knowledge: Know content/curriculum; Know best practices in instruction
Content of Innovation	Knowledge: Know IC process/Philosophy; Know Change Process

Most of the expected categories corresponded with interview-generated categories. Because the interview protocol was informed by the content analysis of IC literature and training materials, it is not a surprise that many general categories were represented in both sources of data. Some expected items corresponded to multiple categories from the interview data, such as confidence-building and resource-bringing. Confidence-building was represented in Abilities and Attributes as well as in Team Business as a task. Regarding 'resource-bringing,' some facilitators reported that they bring resources in the form of strategies and intervention ideas to the table when they engage in case management. Regarding personnel, some described setting up or building the team by choosing new members and bringing on new ones during turnover. Some facilitators reported that they presented at board meetings where they were making the case for the IC budget to remain intact. This may be an example of bringing financial resources, in an indirect way.

Beliefs The themes that facilitators communicated in response to a question about beliefs (see Table 20) or assumptions necessary for success in their role mirror the critical assumptions outlined by Gravois, Rosenfield, and Gickling (2002) in the general IC manual:

- All students can learn
- Early intervention is preferable to waiting for failure
- The critical arena for intervention is the student-teacher relationship within the general education classroom
- The instructional match and setting are the focus of problem solving

- A problem-solving community is the foundation for professional and student learning
- Teachers, as professionals, are entitled to consult and collaborate
- Change is a process, not an event

Generally, the facilitators in the interview study focused more on beliefs about student learning and collaboration than on beliefs about early intervention or intervening in the general education classroom. It is interesting to notice the similarities in the beliefs expressed by the facilitators compared to the critical assumptions of the program developers. It is unclear if, or to what extent, the participating facilitators held the beliefs expressed in the interviews before taking on the facilitator role or the extent to which training or experience has shaped their beliefs.

Comparisons to leadership literature. Chapter 2 described team leader functions present in the leadership literature (e.g., Morgeson et al., 2010). Morgeson et al. (2010) created a list of functions and tasks within those functions (see Appendix J). A comparison of these functions and the task and other categories generated by the facilitator interviews are described.

Functions in the transition phase. Consistent with the leadership literature, IC facilitators engage in many of the anticipated team leader functions. Table 24 presents the transition phase functions as they correspond to categories and subcategories of the interview-generated data. Facilitators may not perform every task outlined in Morgeson et al.'s functions. Like other team leaders, facilitators

compose a team, establish expectations and goals, structure and plan their team's work, train and develop the team, and provide feedback. IC facilitators may not fully engage in the function of defining the mission; however, this function related to the match between many facilitator beliefs and the critical beliefs and assumptions outlined by the training materials (Gravois, Rosenfield, & Gickling, 2002). By providing professional development to staff and training the team (see Table 11), they are working to ensure the staff and team has a collective vision and sense of the mission. These are subcategories of the mission function (Morgeson et al., 2010).

Facilitators also reported tasks consistent with action phase functions. IC facilitators monitor the team, manage team boundaries, challenge the team, perform the team tasks, solve problems, provide resources, encourage self-management, and support the social climate. Many of the team leader functions are captured by tasks in Team Business. Team tasks may often take place during team meetings. Meeting-related tasks from the interviews are categorized under Team Business.

Table 24.

Team Leader Functions and Corresponding Interview-Generated Categories

Team Leader Functions	Interview-Generated Task Categories
Transition Functions	
Compose team	Team Business: set up/build team
Define mission	Beliefs; Training: provide professional development to staff; train new team members; provide on-going team member training
Establish expectations and goals	Team Business: set goals and expectations for team
Structure and plan	Team Business: distribute new cases
Train and develop team	Training
Sensemaking Provide feedback	Training: coach/support team members through cases
Action Functions	
Monitor team	Team Business: assess team and team members, oversee all tasks related to IC
Manage team boundaries	Maintain Meeting Climate
Challenge team	Training: Coach/support team through cases
Perform team task	Case Management; Team Business: systems manager role
Solve problems	Team Business: attend and facilitate IC meetings
Provide resources	Organizational/Clerical: create materials for team training; prepare for team meeting and trainings
Encourage self-management	Team Business: Maintain meeting climate
Support social climate	Team Business: Maintain meeting climate; build confidence of team members

Implications

In general, the current data supports most of the expected tasks outline in the IC and leadership literature. Common tasks, KSAs, performance standards, and beliefs were found in the content analysis and interview data. This confirming evidence suggests that the current understanding of the role by trainers and program developers is reflected in practice, according to participating facilitators. When asked for feedback, one facilitator reviewed the categories and reported via email that he/she had no additional comments to make and that “things looked good.” While this represents the professional opinion of only one facilitator, it suggests that the general categorization of the facilitator job, based on interview data is in line with current job practices of facilitators trained by the developers. However, this does not mean that there is nothing left to learn from the facilitators about the details of their job.

What have we learned?

Results of the interview study contribute new information about the job of the IC facilitator and can help to refine the expected role and tasks of the facilitator, as described in the IC literature. In this section, contextual factors that may impact the facilitator role and the way in which it is performed are presented. Additional tasks outside those outlined in the IC training materials are identified. Tasks in the IC and leadership literature that were not reported by facilitators are also discussed.

Environmental and contextual factors It is important to consider environmental and contextual factors that may affect how facilitators carry out and view their jobs. The diversity of professional experience across participating

facilitators and environmental issues like budget, additional school initiatives, and other factors all provide useful background information to consider when interpreting the results of the interview study.

Professional diversity. Facilitators in the study had a variety of prior job titles, including special educators, an administrator, reading specialists, and a counselor. Most of the facilitators were engaged in another formal role at their school. Special education and reading specialist were the most commonly reported additional roles. Unique roles, such as principal, grant proposal writer, RTI facilitator and counselor were also represented.

The variety in prior roles reflects how many different backgrounds are represented. This heterogeneous group of professionals may bring different perspectives and experiences to their work and the nuanced ways in which they carry out the facilitator role may reflect this diversity.

Budget. One general contextual theme that emerged from the interviews was budget issues in the schools. A few facilitators reported participation in presentations to the board and other communication with district staff regarding the future of IC in their school due to budget constraints. Budget issues also affected the morale of staff, according to some facilitators.

Other school initiatives. Some facilitators reported that other school initiatives, such as RTI, or specific reading programs, have an influence on their role. In some cases, facilitators were required to participate on other teams and give presentations about topics not specific to IC (such as RTI). In one case the IC facilitator was also the leader of the RTI team. Another facilitator was also

responsible for scheduling and attending meetings to begin the special education process and bring IC-related data. The way in which IC fits within the context of other programs could be unique to each district and school building. However, it is worth noting that the way that a school configures its initiatives may affect not only the perception of IC, but the way facilitators work. Some facilitators reported that they must manage conflict between programs at their schools.

Other contextual factors. Factors such as school size, schools serving rural vs. suburban communities, and the age groups served by the school were also mentioned. All of these factors likely influence the way in which IC Teams is implemented and may affect how the facilitator perceives and carries out his or her daily tasks. For instance, about half of the facilitators reported working in multiple schools. These individuals have an added task of traveling between sites and likely spend their time in different ways when they need to conduct many of the facilitator tasks at two locations.

Additions to the role. Findings from this job analysis highlight the additional tasks that the facilitator may take on, which fall outside the scope of their expected role and functions in the IC literature (Gravois, Rosenfield, & Gickling, 2002; Gravois, Rosenfield & Gickling, 2007; Rosenfield & Gravois, 1996). This work documents the nature of additional tasks that facilitators are asked to balance, while accomplishing the tasks required for facilitation. The amount of time spent on additional activities was not explored in this study. However, it is clear that many facilitators engage in activities outside of what is expected by trainers and program

developers. It may be important to consider how this issue may impact implementation and time allocated to other facilitator tasks.

Non-IC Activities. Facilitators reported that they engage in additional school responsibilities or ‘extra-hand’ tasks, which fall outside of the prescribed role of the IC facilitator. Some of these activities may be unavoidable, especially in actual, serious emergency situations. The extent to which facilitators engage in non-IC tasks may vary as a result of the school or district expectations for all employees and the specific culture as it relates to non-traditional employees who may not be tied to the same rigid schedule of a classroom teacher.

Facilitators with dual roles in their schools may be in a unique position when it comes to participation in additional activities. The ways in which facilitators divide their time between roles may be clearer in some instances than in others. For example, the facilitator role was added on top of one participant’s current job. Responsibilities were not taken away from the original role and the facilitator was left to navigate ways in which to manage time and meet all of the expectations of both job titles.

Other factors, such as budget and ability or willingness to provide substitutes or paraprofessional staff, may affect the additional roles the facilitator must play in other school activities. In some limited, specific instances, facilitators reported that they spent significant amounts of time (up to 20%) engaged in non-IC activities during their contracted ‘IC time.’ This may be an issue for program developers and systems-level IC staff to investigate further to determine the potential impact that

engagement in non-IC activities may have on the fidelity of implementation of the program.

Systems manager role. According to the interviews, at least nine of the 12 facilitators function in the role of the Systems Managers, even though training materials define this as a separate role meant for a team-member (Gravois, Rosenfield & Gickling, 2002). Facilitator C reiterated this point on the facilitator feedback form and stated that the Systems Manager duties fall outside of the role of the facilitator. In discussion with participants during the interviews, some facilitators commented that they took on the systems manager role because they felt their time was more flexible, especially if their time was dedicated to IC facilitation. This may be an important point for developers and trainers to consider, as some schools may find reasons to adapt the boundaries of the systems manager and facilitator roles to best meet their needs.

Conclusion: Illustration of the Role.

The IC facilitator role was designed to aid the implementation of an intervention by building and training a team, participating in the activities of that team, and further the change process (Rosenfield & Gravois, 1996). According to the APA Division 16 Working Group on Translating Science to Practice, interventions should be implemented with fidelity. Providing training may be one important way to ensure that interventions are carried out as designed (Forman et al., 2012). As the team leader, the IC facilitator is in a critical position for the successful training of intervention implementers (team members) and for facilitating the day to day functions of the team.

There was considerable overlap in the tasks and other statements generated by the interviews and the expected tasks outlined by the IC literature and training materials. Participating facilitators presented a rich depiction of their job, using personalized, nuanced ways to perceive and describe their work. Yet, many of the idiosyncratic statements were found to be variations on the same themes. In these instances, statements were collapsed into categories and subcategories and examples were included to illustrate the variations and unique ways in which individuals carry out tasks necessary for their jobs. The categories, subcategories and examples of tasks, KSAs, performance standards, and beliefs provide a rich picture of the IC Facilitator. (See Tables 6 through 20).

Convergence and expansion While many of the interview-generated categories already existed in the IC literature, the details may not have been recognized. For example, program developers and trainers expect that facilitators will plan for IC team meetings (see Table 23 and Appendix I). However, Table 10 shows that planning was reported in the context of weekly team meetings, full- and half-day trainings, administrative contact, coaching, and case management. Confronting in order to address conflict is an expected task outlined by program developers (Rosenfield & Gravois, 1996). Current data reveals that facilitators do in fact manage conflict and do so in several contexts, with several parties (see Table 7). These examples are highlighted in order to illustrate ways in which this study expanded, as well as confirmed, tasks from the content analysis.

Expected tasks not represented. Table 23 presented Key Skills of the Facilitator, as outlined by the IC Facilitator Training Manual, compared to the skills

and tasks generated by the interviews. One key skill, ‘diagnosing organizations’ was not represented in the interview data. Facilitators reported assessing the team and team members (Table 9) but they did not report working with the school organization as a whole.

Schools implementing IC Teams are generally a part of a larger project that may encompass their state, county, or district. It is possible that ‘diagnosing organizations’ is a task performed by systems-level facilitators, district-level or project coordinators, or other professionals associated with IC Teams and that this is no longer a task generally expected of the building-level facilitator. The building-level IC facilitator, who is the subject of this job analysis, is more active in implementation activities — actions that ensure that an intervention is carried out fully and appropriately (Forman et al., 2012). Change facilitators are responsible for bringing in new ideas and programs (Rosenfield & Gravois, 1996). Systems-level facilitations or project coordinators at the district or state level may be responsible for initiating the innovation, diagnosing and assessing the organization, and working to facilitate change in the larger system. Program developers and trainers may wish to consider this possible evolution of the role when updating training materials. A clearer distinction may be warranted between the role of building-level facilitator and facilitators at other levels, especially regarding the facilitation of the change process in a system.

Team leader functions. One of the team leader functions described by Morgeson et al. (2010) was not reported by the participating facilitators. It is less clear if facilitators engage in sensemaking, where they interpret and communicate

environmental events to the team. One of the tasks in this category is to help the team interpret things that happen inside the team. It is possible that facilitators do this as part of facilitating the IC meeting (see Table 9), but it is not explicitly stated in the interview data.

Interconnectedness and overlap of categories. The process of identifying task and other categories revealed that many of the general tasks of the IC facilitator apply to several areas of their work. As described in Chapter 3, facilitators reported general organizational/clerical tasks, such as preparing for meetings and creating materials (see Table 10), that can apply to case management, coaching, administrative contact and others. Tables 22 and 23 present the interview-generated tasks as they correspond to the skills outlined in the IC literature. The expected tasks appear fairly general, as several of them fit with more than one interview-generated task category. This may point to the overlap and interconnected nature of the tasks but may also indicate that the interviews generated more detailed data than was outlined in the IC literature and training material that was reviewed.

Statements may fit in multiple categories and work in tandem with other KSAs and tasks may be carried out in conjunction with other tasks. For example, the activity of conflict mediation (see Table 7), regardless of the parties with whom the facilitator is mediating, draws on interpersonal skills (see Table 18), as well as personal attributes (see Table 19) that may help facilitators to tolerate negative feedback while remaining productive and without taking it personally. There also may be a circular relationship between statements. Knowledge and skills likely precede the tasks; however execution of the task can be expected to influence KSAs.

By definition, knowledge and skills are acquired and may evolve (Fine & Cronshaw, 1988). The extent of interconnectedness of tasks and KSAs and specific relationships between areas was captured in the interviews.

Facilitator feedback also highlighted the interconnected nature of the task and other categories. Comments tended to integrate statements from other categories, suggesting that some tasks, skills, and activities may fit into multiple categories (See Table 21). Facilitator C suggested that facilitators empower team members to communicate with staff about the IC process. Here, the facilitator integrated Tasks, specifically, team business (“encourage teachers to use the team”) with interpersonal skills, listed under Abilities and Attributes (“empower others...”). Facilitator B highlighted the ways in which skills and tasks intersect with the suggested addition of “apply congruency and *communication skills* when dealing with *conflicts*” [emphasis added]. Based on the feedback from facilitator B, it appears that there is overlap in the way people think about skills versus knowledge. This facilitator reported that comfort or knowledge of cases of all types could be better represented in the summary of statements and that an additional communication skill of ‘congruency’ may be relevant to the job. These statements may be more appropriately placed in the Skill section.

Many skills and tasks may not be unique to the facilitator. Case management tasks (see Table 8) and communication skills (see Table 18) likely apply to team members and systems-level facilitators, as they are topics covered in general IC training (Gravois, Rosenfield, & Gickling, 2002). However it is impossible to know

at this time how facilitators' description of these tasks compares to that of other professionals.

Final Thoughts. The job analysis of the IC facilitator served to provide confirmation that most expected tasks, KSAs and beliefs outlined by IC training materials are present in incumbents description of the job. This study also revealed some key deviations from the expected role that may be of interest to IC trainers, program developers and others in the implementation science community. As IC has evolved and is implemented in large systems, the role of the building level-facilitator, as compared to others in the program who facilitate change, may need to be clarified in the IC literature and training materials. Stakeholders may also wish to further investigate the impact that additional tasks and, such as non-IC activities and the Systems Manager duties, have on the role to determine how facilitators can best manage the boundaries of their jobs.

Limitations

Although this interview study provides a glimpse into the facilitators' perspectives about their job and daily tasks, there are several limitations to the design that may impact the generalizability and interpretation of results. The limitations of the job analysis process, the sample of participants, and jargon used in the interviews are presented.

Limits of Job Analyses. Job analysis as a technique has inherent limitations. The JA process is a time-consuming endeavor and must be kept up to date for it to remain relevant (Harvey, 1991). One of the challenges in interpreting JA results is the degree of error that may affect data quality (Hennen, 2008), as the analyst must

make many decisions about categorizing statements, interpreting them, and comparing them to statements from the content review. Raters, including this researcher, base judgments on differing interpretations of the job, tasks and KSAs. Specific techniques within the JA process, such as the interview and verification process also have limitations to consider.

Interview limitations. The statements and examples included in this report are based on what facilitators explicitly stated in interviews. There may be other tasks, KSAs, materials, performance standards, and other important job-related information that is a regular part of the role, but that was not reported.

After analyzing the interview data, it became apparent that some areas of the job could have been explored by additional interview questions. For example, participants were not explicitly asked if they completed the IC facilitator training program. The tasks, KSAs, and beliefs of the IC facilitator are likely influenced by the amount of training they receive. Only two facilitators explicitly reported that they completed facilitator training. This number likely does not reflect the actual number of participants who completed training, as the issue was not clearly addressed. It is also not clear from the data how recently some facilitators were trained and if there is any ‘drift’ in their practice.

The interviews varied in length from 45 minutes to over 1 hour 30 mins. Variations in length may contribute to the number and variety of statements that were pulled from each interview. Some facilitators indicated they had only a limited amount of time to spend on the phone, and their interviews were limited to about one-hour. Individual variation in communication style may have also played a role in the

length of interviews. Some facilitators gave many detailed examples and anecdotes, while others responded to direct questions with little extra information that was shared. In one instance, a facilitator was in her shared office at the time of the interview and the presence of others in the room may have affected her responses in some way.

It was known to the facilitators that I was working with one of the IC program developers on this research. Their responses may have been influenced by this knowledge.

Verification. The verification process also has limitations that impact the results and conclusions. Facilitators were asked to consent to participation in an additional phase of the study, and three of the twelve responded. They provided responses in writing, thus eliminating the opportunity for follow-up questions and clarification of their comments. Facilitators, many of whom are likely not 12-month school employees, were contacted over the summer and may not have been available to participate. Supplemental observations, reviews by IC trainers and staff, and communication with additional facilitators who did not participate in the original interview study may have yielded additional information to verify the accuracy of the interview-generated statements.

Participant Sample. Information was gathered from 12 facilitators who volunteered to participate. These facilitators may not be representative of all IC facilitators and the small sample size will have considerable impact on generalizability, as facilitators from different districts and with different levels of experience were not equally represented. According to Hennen (2008), job analysis

participants are more likely to be members of the racial/ethnic majority rather from minority groups. Participants are also more likely to be high performing, more experienced, and higher paid. According to interview data, four of the facilitators reported engagement in IC Program Development tasks. This shed some light on the level of experience of the participants, as these tasks are beyond the typical role of a building-level facilitator. Data from unrepresentative samples may lead to a bias in the interpretation of the data and may present a picture of job demands that is more complex than the norm.

Jargon and assumptions of knowledge. Several facilitators used IC “jargon” during the interviews to describe people, tasks, and skills in the job. Given the length of the interviews and number of questions, it was not possible to ask follow-up and clarifying questions about all terms, comments, and job-related information. In many instances, I understood terms and acronyms that were used, such as LOI, SDF, and systems manager, based on the content analysis and literature review. However, my understanding of the facilitators’ responses to questions is influenced by my own familiarity with IC based on the literature and personal experience with the initiative, my biases, and the extent to which I understand the details of the program. While outside the scope of this study, it may be interesting to consider if facilitators generally communicate with “jargon” or if this was a by-product of communication with someone they assumed was familiar with IC.

Future Directions

Understanding the tasks, KSAs, and other factors relevant to the IC facilitator job opens up several avenues of future research. Future research may include surveys

and other job analysis techniques to verify the current findings and probe deeper into the job of the IC facilitator, and to examine the characteristics necessary for success in the role.

Surveys. The information gleaned from the content analysis and interviews in this study may serve as a basis for a survey instrument, and may eliminate some of the issues of relying on the individual to generate a complete list of tasks, KSAs, beliefs and performance standards, as discussed above. Survey respondents may be exposed to more tasks and KSAs than they might generate on their own if asked open-ended questions.

A future survey could explore the amount of time spent in various activities or a count the frequency of certain tasks. Specifically, facilitators could be asked to report the amount of time they spend on non-IC activities and asked to report how these activities impact their abilities to fulfill expectations of their facilitator role. The perceived importance of each tasks or other item, from the facilitators' or other stakeholders' perspective, may shed light on the role. Importance ratings could also be compared to program developers', trainers' or other IC staff members' ratings of task/KSA/belief importance. A larger survey may also allow for comparisons to be made based on contextual and demographic information or between facilitators who are in various phases of implementation. However, care must be taken to ensure an adequate number of survey participants, should this line of research be pursued.

Another potential line of research includes distinguishing the most critical job tasks from other activities of less importance (Goldstein, Zedeck, & Schneider, 1993) by determining essential vs. marginal job functions using a survey of task and other

statements. Shetterley & Krishnamoorthy (2008) studied the job characteristics of police officers and law enforcement agents to identify the most critical job characteristics. They intended to develop standards used to evaluate employees based on their findings. Shetterley & Krishnamoorthy distributed a questionnaire about mental and physical job requirements to officers and agents. Participants rated the importance and of each item. Using a factor analysis procedure, they were able to distinguish the high-priority job characteristics for each group. This method allowed for comparisons of characteristics to be made across job title. A similar method may be used to understand the essential and marginal activities of the facilitators. It may be possible to streamline the expected tasks outlined in training materials if there are marginal tasks that can be eliminated or delegated.

Critical incidents. Other job-analysis techniques, such as critical incident reports could also supplement the current study and provide a deeper understanding of the role of the facilitators. Flanagan (1954) developed and utilized the critical incident technique, which consists of a set of procedures to observe or record information about job behavior so that practical problems can be addressed. Critical incidents reports describe the setting in which a behavior occurs, the behavior itself, and the positive or negative consequences of that behavior. Critical incidents are usually collected from Subject Matter Experts (SMEs) or incumbents. SMEs are asked to recall examples of particularly effective or ineffective job behavior they have witnessed or performed. By pooling incidents from several SMEs, a picture of job performance is developed (Harvey, 1991). Critical incident reporting can also focus on the nature and causes of job satisfaction or dissatisfaction. This technique can

provide insight into the *sources* of employee's feelings of satisfaction from descriptions of specific experiences (Locke, 1976).

Comparison to other team leaders. Surveys, critical incident reports, or other methods may be applied to facilitators and other team-leaders in schools. A survey distributed to various team leaders would allow for systematic comparison of the essential activities, KSA's, and beliefs across roles. Understanding the IC facilitator role, in comparison to others, may become of interest, as some facilitators in this study reported participation on multiple teams in their schools. The way in which an IC facilitator accomplishes tasks may be influenced by the tasks and leadership functions expected in their other role.

Facilitator effectiveness. Another direction for future research on the IC facilitator may include a study on the effectiveness of the facilitator or team and the relation between ratings of success and contextual factors, such as budget, years of experience, ability to provide training, or other variables. A deeper investigation into facilitators' perception of their personality/personal attributes, skills, and beliefs and how these relate to their competency as a facilitator or the types of tasks they undertake more frequently may be informative in guiding the selection and training process of IC facilitators. Ratings of effectiveness, as measured by self-report, IC tools, or other methods could also be compared to ratings on the evaluation tools used by school districts. Several facilitators commented that the evaluations tools used in their schools were designed for teachers and did not accurately reflect their roles, suggesting a potential area of need regarding future research.

Appendices

Appendix A: Skills Necessary for Change Facilitation

(Rosenfield & Gravois, 1996; McMahon, 1998; Adapted from Miles, Saxl, & Lieberman, 1988)

Table 1

Skills from Rosenfield & Gravois

Skill	Definition
Interpersonal ease	Ability to relate easily with others
Group functioning	Understanding group dynamic, ability to facilitate teamwork
Training/doing workshops	Instructing others systematically
General education	Broad education experience
Educational content	Knowledge of schools and subject areas
Administrative/ organizational	Defining and structuring team activities/time
Initiative-taking	Starting activities, pushing self & others toward action
Trust/rapport building	Creating a sense of openness amongst team
Support	Providing encouragement to others
Confrontation	Direct expression of negative information
Conflict mediation	Resolving/improving different interests
Collaboration	Creating an environment of sharing
Confidence-building	Strengthening others' sense of efficacy
Identifying needs of others	Forming a valid picture of needs/problems of

	individuals
Identifying needs of organizations	Forming a valid picture of needs/problems of the school as an institution
Managing/controlling	Coordinating events, time, people, and influencing others
Resource-bringing	Locating and providing needed materials, information, etc.
Demonstration	Modeling skills, behaviors in meeting, etc.

Appendix B: Interview Protocol for 2 Pilot Interviews

Sample Interview Questions

General questions in each topic area are based on Fine and Cronshaw's (1999) focus group techniques for Functional Job Analysis. Additional follow-up questions can be added in response to individual answers.

Outputs

General Question: What do you get paid for?

1. What is your current position?
2. How do you spend your time each week? (use answers from this for other follow ups)
3. How much of your time is spent on the following activities:

Training of team	Case Management
IC Team Meetings	Administrative Consultation
Coaching	Meeting Prep
18 Skills from Saxl & Miles	Training (self)
Research activities	Program Evaluation
Working with external support staff	Professional Development (of school staff)
Other	

4. How many cases do you take?
5. How many team members have you trained?
6. How do you conduct your training?
7. How do you conduct meetings? What is your role and the roles of other team members in those meetings? (i.e. systems manager, role of principal?)

Knowledge

General Question: What do you need to know to do what you get paid for?

1. Are there necessary beliefs or assumptions in order to be successful in your role? If so, what are they?

Skills & Abilities

General Question: What skills/abilities do you need to apply your knowledge?

1. What skills do you think are critical for successful facilitation?
2. Which critical skills are your best and which could benefit from more training?

Tasks

General Question: What do you need to do to get your work done?

1. Do you have responsibilities that are different from other facilitators?
2. Is there anything about the way you carry out your role/responsibilities that differed from your colleagues or from the job description?
3. What materials, tools, and equipment do you use on the job?

Performance Standards:

General Question: What standards do you work toward- yours and your organization's?

1. What tools are used to evaluate your performance?
2. Do you receive any supervision?

Other

1. How does the actual day-to-day job differ from what you expected when you took on the position?
2. What did you know about IC before taking the job?
3. What would have been helpful to know ahead of time?
4. Why did you apply/accept the facilitator position?
5. What was your job title before?
6. Given the opportunity, would you continue in the position?
7. What are your career aspirations and how does the facilitator role fit in to those goals?
8. What unique demands are put on you as a member of your particular school?
9. What makes this job easy/difficult? Or What were the easiest and most difficult parts of the job?
10. What are your hours?
11. Describe the working conditions. How could they be improved? How do they affect your success in the job?
12. What are some obstacles you face in carrying out your role?
13. How does the school climate affect your role?
14. With whom at the school do you communicate/collaborate most frequently?
15. What conflicts have you experienced? Personal, professional, etc.
16. Discuss your role as a change agent. How do you measure or recognize changes that occurred?
17. How does your role as an IC Facilitator compare to other team leaders in your school?

Appendix C: Interview Protocol for Interviews 3-12

Sample Interview Questions

General questions in each topic area are based on Fine and Cronshaw's (1999) focus group techniques for Functional Job Analysis. Additional follow-up questions can be added in response to individual answers.

Outputs

General Question: What do you get paid for?

8. What is your current position?
9. How do you spend your time each week? (use answers from this for other follow ups)
10. How many cases do you take?
11. How many team members have you trained?
12. How do you conduct your training?
13. How do you conduct meetings? What is your role and the roles of other team members in those meetings? (i.e. systems manager, role of principal?)

Knowledge

General Question: What do you need to know to do what you get paid for?

2. Are there necessary beliefs or assumptions in order to be successful in your role? If so, what are they?

Skills & Abilities

General Question: What skills/abilities do you need to apply your knowledge?

3. What skills do you think are critical for successful facilitation?

4. Which critical skills are your best and which could benefit from more training?

Tasks

General Question: What do you need to do to get your work done?

4. Do you have responsibilities that are different from other facilitators?
5. Is there anything about the way you carry out your role/responsibilities that differed from your colleagues or from the job description?
6. What materials, tools, and equipment do you use on the job?

Performance Standards:

General Question: What standards do you work toward- yours and your organization's?

3. What tools are used to evaluate your performance?
4. Do you receive any supervision?

Other

18. How does the actual day-to-day job differ from what you expected when you took on the position?
19. What did you know about IC before taking the job?
20. What would have been helpful to know ahead of time?
21. Why did you apply/accept the facilitator position?
22. What was your job title before?
23. Given the opportunity, would you continue in the position?
24. What are your career aspirations and how does the facilitator role fit in to those goals?

25. What unique demands are put on you as a member of your particular school?
26. What makes this job easy/difficult? Or What were the easiest and most difficult parts of the job?
27. What are your hours?
28. Describe the working conditions. How could they be improved? How do they affect your success in the job?
29. What are some obstacles you face in carrying out your role?
30. How does the school climate affect your role?
31. With whom at the school do you communicate/collaborate most frequently?
32. What conflicts have you experienced? Personal, professional, etc.
33. Discuss your role as a change agent. How do you measure or recognize changes that occurred?
34. How does your role as an IC Facilitator compare to other team leaders in your school?

Appendix D: Participant Recruitment Email (Interview)

Dear (Insert Facilitator Name),

My name is Megan Vaganek and I am a doctoral school psychology student at the University of Maryland. I am conducting an interview study to better understand the specific tasks involved in the role of the IC Facilitator. You have been randomly selected as a potential study participant. The semi-structured interview will be conducted over the phone and is expected to take 1-1.5 hours to complete.

Participation is voluntary. Please see the attached informed consent form for more detailed information regarding the study, risks and benefits, and confidentiality.

My advisor and the co-principal investigator for this study is Dr. Sylvia Rosenfield. This study has been approved for data collection by the institutional review board at The University of Maryland.

Please visit <http://www.surveymonkey.com/s/YF58XGG> to read the informed consent form and indicate your interest in participate. If you agree to participate, please type your full name in the box provided on the survey. The student investigator will contact you shortly to set up a convenient time for the semi-structured phone interview.

Please feel free to contact me with any questions or concerns at megan.vaganek@gmail.com.

Thank you,
Megan Vaganek

Appendix E: Interview Informed Consent

*Note: This information will be made available to participants via a Survey Monkey survey.

Purpose of the Study

This research is being conducted by Sylvia Rosenfield, PhD, Principal Investigator and Megan Vaganek, a graduate student at the University of Maryland, College Park. We are inviting you to participate in this research project because you are currently an Instructional Consultation Team Facilitator. The purpose of this research project is to better understand the tasks involved in the role of IC facilitation through semi-structured interviews with current IC Facilitators.

Procedures

The procedures of this study involve participation in a semi-structured phone interview with Ms. Vaganek. The interview will be audio recorded. Questions will focus on the outputs, knowledge, skills and abilities (KSA), tasks, and performance standards relevant to the job of IC Facilitation. The interview is expected to require one to one and one-half hours of your time.

Potential Risks and Discomforts

The risks of participating in this interview study are minimal. As a participant, you will be asked to describe your current employment as an IC Facilitator. You may experience psychological discomfort discussing issues relevant to their job satisfaction, assessment of their skills, and overall experience as a facilitator. Your confidentiality may be at risk, given the nature of the information revealed in the interviews. Participants will be informed of the risks to confidentiality. There are no known physical, financial, social, or legal risks associated with participation in this research. You may choose not to answer any questions and can remove yourself from the study at any time, without penalty.

Benefits

Participants can expect no direct benefits as a result of their voluntary participation; however participants may experience indirect benefits as the study intends to contribute to knowledge about team facilitation. Participants may experience some indirect benefits from reflecting on the professional role as an IC Facilitator.

Confidentiality

Any loss of confidentiality will be minimized by storage of audiotapes in a secure location, password protection of interview transcripts and removal of identifying information from transcripts before including them in reports of this research. Reports and/or articles about this research project will protect your identity to the maximum extent possible. Because of the small sample size and interactive nature of the IC Team community, participants are reminded of the risks to their confidentiality. Your information may be shared with representatives at the University of Maryland, College Park or governmental authorities if you or someone else is in danger or if we are required to do so by law. Every effort will be made to remove identifying information from interview results.

Medical Treatment

The University of Maryland does not provide any medical, hospitalization or other insurance for participants in this research study, nor will the University of Maryland provide any medical treatment or compensation for any injury sustained as a result of participation in this research study, except as required by law. No such injury is anticipated, however.

Right to Withdraw and Questions

Your participation in this research is completely voluntary. You may choose not to take part at all. If you decide to participate in this research, you may stop participating at any time. If you decide not to participate in this study or if you stop participating at any time, you will not be penalized or lose any benefits to which you otherwise qualify.

If you decide to stop taking part in the study, if you have questions, concerns, or complaints, or if you need to report an injury related to the research, please contact the investigator, Sylvia Rosenfield at the following:

Address: 3214 Benjamin Building, College Park MD 20742; Phone: 301-405-2861;
Email: srosenf@umd.edu

Or, Ms. Megan Vaganek at: megan.vaganek@gmail.com

Participant Rights

If you have questions about your rights as a research participant or wish to report a research-related injury, please contact: **University of Maryland College Park**

Institutional Review Board Office
0101 Lee Building
College Park, Maryland, 20742
E-mail: irb@umd.edu
Telephone: 301-405-0678

This research has been reviewed according to the University of Maryland, College Park IRB procedures for research involving human subjects.

Statement of Consent

Your signature indicates that you are at least 18 years of age; you have read this consent form or have had it read to you; your questions have been answered to your satisfaction and you voluntarily agree to participate in this research study. You will receive a copy of this signed consent form.

If you agree to participate, please sign your name below.

Signature and Date

Name of Subject _____

(Please Print)

Signature of Subject _____

Date _____

Appendix F: Survey Monkey Form

1. Purpose of the Study

This research is being conducted by Sylvia Rosenfield, PhD, Principal Investigator and Megan Vaganek, a graduate student at the University of Maryland, College Park. We are inviting you to participate in this research project because you are currently an Instructional Consultation Team Facilitator. The purpose of this research project is to better understand the tasks involved in the role of IC facilitation through semi-structured interviews with current IC Facilitators.

Procedures

The procedures of this study involve participation in a semi-structured phone interview with Ms. Vaganek. The interview will be audio recorded. Questions will focus on the outputs, knowledge, skills and abilities (KSA), tasks, and performance standards relevant to the job of IC Facilitation. The interview is expected to require one to one and one-half hours of your time.

Potential Risks and Discomforts

The risks of participating in this interview study are minimal. As a participant, you will be asked to describe your current employment as an IC Facilitator. You may experience psychological discomfort discussing issues relevant to you job satisfaction, assessment of their skills, and overall experience as a facilitator. Your confidentiality may be at risk, given the nature of the information revealed in the interviews. Participants will be informed of the risks to confidentiality. There are no known physical, financial, social, or legal risks associated with participation in this research. You may choose not to answer any questions and can remove yourself from the study at any time, without penalty.

Benefits

Participants can expect no direct benefits as a result of their voluntary participation; however participants may experience indirect benefits as the study intends to contribute to knowledge about team facilitation. Participants may experience some indirect benefits from reflecting on the professional role as an IC Facilitator.

Confidentiality

Any loss of confidentiality will be minimized by storage of audiotapes in a secure location, password protection of interview transcripts and removal of identifying information from transcripts before including them in reports of this research. Reports and/or articles about this research project will protect your identity to the maximum extent possible. Because of the small sample size and interactive nature of the IC Team community, participants are reminded of the risks to their confidentiality. Your information may be shared with representatives at the University of Maryland, College Park or governmental

authorities if you or someone else is in danger or if we are required to do so by law. Every effort will be made to remove identifying information from interview results.

Medical Treatment

The University of Maryland does not provide any medical, hospitalization or other insurance for participants in this research study, nor will the University of Maryland provide any medical treatment or compensation for any injury sustained as a result of participation in this research study, except as required by law. No such injury is anticipated, however.

Right to Withdraw and Questions

Your participation in this research is completely voluntary. You may choose not to take part at all. If you decide to participate in this research, you may stop participating at any time. If you decide not to participate in this study or if you stop participating at any time, you will not be penalized or lose any benefits to which you otherwise qualify.

If you decide to stop taking part in the study, if you have questions, concerns, or complaints, or if you need to report an injury related to the research, please contact the investigator, Sylvia Rosenfield at the following:

Address:

3214 Benjamin Building, College Park MD 20742;

Phone: 301-405-2861; Email: srosenf@umd.edu

Or, Ms. Megan Vaganek at:

megan.vaganek@gmail.com

☐

2. If you have questions about your rights as a research participant or wish to report a research-related injury, please contact:

University of Maryland College Park

Institutional Review Board Office

0101 Lee Building

College Park, Maryland, 20742

E-mail: irb@umd.edu

Telephone: 301-405-0678

This research has been reviewed according to the University of Maryland, College Park IRB procedures for research involving human subjects.

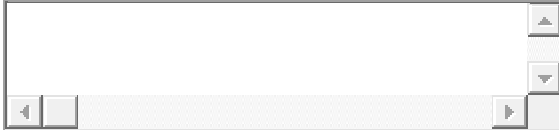
☐

3. Checking the first box below indicates that you are at least 18 years of age; you have read this consent form or have had it read to you; your questions have been answered to your satisfaction and you voluntarily agree to participate in this research study.

☐ Checking the first box below indicates that you are at least 18 years of age; you have read this consent form or have had it read to you; your questions have been answered to your satisfaction and you voluntarily agree to participate in this research study. I agree to participate in the study.

☐ I do not agree to participate in the study

4. Name and Date



Name and Date

Done

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Appendix G: Sample Tasks Statement List from Interview Transcript

Transcript #	Task Statement
3	Facilitate hour-long IC Meeting
3	Prepare for meeting for about 1.5 hour per week.
3	Write meeting plan
3	write lesson plan/agenda for week's training
3	Plan meeting
3	Organize materials for meeting
3	Make copies for meeting
3	Copy weekly plan and activities/handouts that are appropriate for the topic
3	Organize and copy assessments
3	Train team members
3	Provide on-going team-member training
3	Differentiate training for new and veteran team members
3	Coach members through cases (math case for vets; reading for new members)
3	Make sure everyone is staying on track during meeting
3	Make sure cases are moving forward- keep to the 4 week timeline
3	
3	Ask for case updates during meetings
3	Address the goals of the meeting with team
3	Ask veteran members to mentor new members through Problem ID steps
3	
3	Organize ½ day trainings
3	Invite teachers and students to participate in ½ day training (2x a year)
3	
3	Ask veteran members to observe new team members.
3	Lead meetings
3	Introduce topics at meetings.
3	Teach/tell the activity during meetings
3	Talk with teachers (consultees & case managers) informally in hallway about cases
3	Encourage team members to have me observe meetings with consultees (have not been asked to observe)
3	Asked team members to complete reflection sheet (though they did not)
3	
3	Conduct needs assessment
3	Conduct “temperature taking” of team
3	Attend monthly staff meeting
3	Present to staff at monthly staff meeting about IC; Provide Professional

	Development
3	Encourage teachers who have concerns that IC takes too long to refer a case
3	
3	Conduct LOI interviews at other schools
3	Participate in LOI interviews- interviewed by others
3	
3	Use communication skills
3	Develop rapport with teachers
3	Follow steps of problem solving process
3	Respect adults as learners
3	Hear/deflect complaints
3	Encourage team members
3	Check in with teachers every week(as case manager)
3	Decide when to close a case (in case manager role)
3	
3	Made 'little cards' for intervention
3	Laminated intervention cards
3	Distributed intervention cards as a resource for team members
3	
3	Develop interventions for cases
3	Give copies of intervention to team as a resource
3	
3	Typed list of appropriate operational definitions for reading, writing, and math concerns.
3	Add operational definitions to list as they are developed by team
3	Go through math assessment and determine what would be the most appropriate application to 1 st -5 th grade students.
3	Typed up appropriate uses of math assessment for grade levels
3	Create materials
3	Share created materials with team
3	Give resources (materials) to team
3	
3	Promote IC
3	Attend grade level meetings (every other week)
3	Run grade level meetings
3	Ask teachers at grade-level meetings whom they are concerned about
3	Ask teachers if they would consider doing an IC case
3	
3	Use computer for updates
3	Use IC books 1-3
3	Use paper
3	Use white board
3	Used resources I have created for team
3	Use math manipulatives

3	
3	Read emails
3	Attend trainings
3	Ask for verification of expectations re: team member training (i.e. whom should attend which training)
3	
3	Get observed by principal yearly and evaluated every 3 yrs for reading specialist role
3	
3	Receive thanks for work as facilitator
3	Receive negative reactions due to change
3	
3	Create meeting schedules
3	Summer- plan meeting agendas
3	Plan training around rotating membership
3	Be a cheerleader for IC
3	Do not interpret negative reactions personally
3	Represent IC
3	
3	Ask team for input for faculty presentations
3	Prepare presentations for faculty
3	
3	Provide schedule of training to principal so he can get substitutes
3	
3	Provide feedback to team members re: their performance/adherence to the process
3	Build confidence of team members
3	
3	Facilitate change by presenting to staff at faculty meetings
3	Talk about IC at grade level meetings
3	
3	
3	Also on “staffing team” with school psych and special educator-(elig)

Appendix H: Facilitator Feedback Invitation Letter and Form

Dear Facilitator,

Thank you for your participation in the interview portion of this study last year. Below you will find a summary of the data that were gathered about the role of the IC Facilitator using 12 semi-structured interviews. Please review the categories of task and examples drawn from the interviews and answer the following questions about each category:

- Do you see any major inconsistencies in the items compared to your role?
- Are there any major omissions that should be added?
- Do you have additional comments?

A box is provided for each section for your feedback. This activity is expected to take about 20 minutes of your time. You may return your feedback via email or mail to:

Megan Vaganek
10300 Strathmore Hall Street Apt 108
Rockville, MD 20852

mvaganek@umd.edu

Thank you for your participation in the interviews and the feedback process. Your input is a valuable part of this research and your time is appreciated. Please be sure to return the signed consent form should you agree to participate in the feedback portion of the study.

Sincerely,
Megan Vaganek

Change Process
Understand the Change Process
Facilitate Change for IC
<i>e.g., Advocate, represent, and support IC (i.e. be a cheerleader; address concerns about time it takes to take a case)</i>

Change process: Major inconsistencies, omissions, comments?

Beliefs
Assume children can learn, but not in the same way or at the same rate
Belief in Collaboration
<i>e.g., Teachers can work together; no one is an expert; don't let own beliefs interfere when working with others</i>
Believe in IC as a good process
<i>e.g., Believe it can work, believe in the mission; have a vision of how it can work; commitment to following the process with integrity</i>

Beliefs: Major inconsistencies, omissions, comments?

Knowledge
Know principals of learning and behavior for children and adults
Know best practices in instruction
<i>e.g., Intervention strategies, etc.</i>
Know content/curriculum
Knowledge of IC process/philosophy
<i>e.g., Problem solving process, training in IC, how to do IA</i>
Know the change process
<i>e.g., How IC can work in your school, vision, direction ; know team dynamics</i>

Knowledge: Major inconsistencies, omissions, comments?

Skills
Use communication skills
<i>e.g., Paraphrase, summarize, ask clarifying questions, etc.</i>
Use Management skills
<i>e.g., Time management, organizational skills, keep people on task, prioritize time</i>
Case management skills
<i>e.g., Narrow down concerns, do assessments, interpret data,</i>
Use interpersonal skills
<i>e.g., Build relationships with staff</i>
Computer skills
<i>e.g., Use ICAT tools, troubleshooting, general computer skills</i>

Skills: Major inconsistencies, omissions, comments?

Abilities & Attributes
Executive functioning skills
<i>e.g., Need to be able to break things down into smaller pieces; organize; be a self-starter; multi-task; be flexible, be able to see the bigger picture</i>
Interpersonal skills
<i>e.g., Work with groups; work with people/different personalities; deal with different personalities; empathize with others; empower others that they can do it (the process); help people feel certain; help others to feel safe; be able to read other people; deal with hard questions and attitudes of adults; help others reflect on how they feel</i>
Personal attributes
<i>e.g., Be patient; take risks; be firm but understanding and supportive</i>

Abilities/Attributes: Major inconsistencies, omissions, comments?

Case Management
Engage in Case Management
<i>e.g., Engage in case management with teachers, principal or others as consultee</i>
Problem Solving Process
<i>e.g., Collect data; meet with consultee; engage in small group cases; provide feedback to teachers; sit with teacher during snapshot; help to implement strategy; bring in strategy resources/info</i>
Interpersonal tasks in Case Management
<i>e.g., Help lower consultee's anxiety; keep conversations congruent; connect with teacher; understand where teacher is with their concern; develop rapport with teachers (consultees)</i>
Communication with Consultee
<i>e.g., check in with consultee informally via phone, email, in person</i>

Case Management: Major inconsistencies, omissions, comments?

Team Business
Oversee all tasks related to IC
Set up/ build team
<i>e.g., Choose team members that you know will be supportive; bring on new team members when others leave; meet with people before they join the team</i>
Build confidence of team members
Assess team and team members
<i>e.g., Ask team what their needs are; administer self-assessment to team; engage in temperature-taking; conduct need assessment; talk with team about how they feel to inform planning; get feedback from team about what they want to work on; ask team to complete reflection sheet</i>
Encourage teachers to utilize the IC team
<i>e.g., Encourage teachers who have had a bad experience with IC to take another case; get as many teachers as I can involved with IC; get as many teachers as I can to have a positive experience with IC</i>

Team Business: Major inconsistencies, omissions, comments?

Set goals and expectations for team (i.e. with input from team, based on needs assess, etc)
Cover class so teacher/case manager can meet
Oversee team members' cases
<i>e.g., Send reminders to case managers to make sure they don't skip steps of the process; be aware of the all the cases that the team has; touch base with case managers to see if they need anything for the week; collect data on how case managers are progressing; remind members that they are still doing cases; track cases; constantly work/nurture the steps of the case for case manager; encourage team members; make sure cases are moving forward (remind case managers of the timeline goals)</i>
Attend and Facilitate IC Meetings
<i>e.g., Make sure everyone stays on track; address goals of the meeting; introduce topics/activities; set next agenda; process/reflect with team member after meeting</i>
Fulfill systems manager role
<i>e.g., Use ICAT tools to update cases; ask team members to fill out check sheet of info for case updates to collect during meeting; take down case update info on paper</i>
Maintain meeting climate
<i>e.g., Keep things fresh; keep energy up; create an open forum; encourage others to provide input; give members opportunities for leadership roles in meeting</i>
Provide training during meeting
<i>e.g., Conduct case reviews; provide practice opportunities; review stages of process</i>
Distribute new cases
<i>e.g., Determine which cases are tougher and take those myself; ask for volunteers for cases, hand out new cases</i>

Organizational/Clerical Tasks
Create materials for cases
<i>e.g., Create intervention materials such as flashcards, games, etc.; develop information materials for teachers; create scoring rubrics; gather intervention materials; find and organize assessment materials for my cases;</i>
Create materials for team training
<i>e.g., Create/edit videos of my cases for training; make up fake cases for training; create power points; make handouts of math assessments; make binders of resources for team members; create review games, write scripts; create visuals for training; make info sheets; write checklists for stages; write list of operational definitions; make copies for the meeting(case review documents, SDF's, etc); make sure forms are available; look for materials for assessment/intervention in the resources that have been collected by team; check goals in order to plan meetings; ask team to assemble binder of resources for their use</i>
Preparing for team meetings and trainings
<i>e.g., Write meeting plan; make notes for meeting; prepare for meeting; create meeting schedule, organize materials for meeting; differentiate training; plan for half- and full-day trainings; write agendas for meetings; invite students/teachers for training meetings; copy materials; order lunch for team (for meetings); call substitutes to cover for team members during meetings/trainings; divvy up training tasks among team member; in the summer, plan the agenda for meetings/trainings for the year; prepare for meetings with consultees</i>
Communication (with team, consultees, staff, etc.)
<i>e.g., Send out online surveys to get information from staff about professional development needs or meeting times; communicate with team members about their schedule for the week;</i>
Prepare for Coaching
<i>e.g., Prepare for coaching meetings; print out tracking forms and check dates with team members</i>
Complete paperwork and administrative tasks

Org/clerical: Major inconsistencies, omissions, comments?

e.g., Log hours; update paperwork after meeting with a teacher; maintain files on cases; maintain notebook for record keeping at meetings; keep a folder for each case I am working on; keep records on cases; read emails; travel between buildings; manage clerical/admin. tasks; make sure IC data is available for 'screening meeting' (special education process if child is referred; cover classes for teachers to encourage them to be a consultee

Providing information to staff
<i>e.g., Write blurb for monthly parent newsletter; maintain IC bulletin board; prepare presentations for staff; create graphs for staff newsletter; maintain whiteboard with goal attainment info and steps of the process</i>
Manage schedules
<i>e.g., Keep schedule of appointments; determine which teachers need to hear from me today; manage team's schedule; review appts for the day; coordinate schedules for subs; coordinate meeting times for members I am coaching; make time in schedule to meet with teachers for my cases; keep lists meetings I need to get ready for; adjust meeting schedules if something comes up; set up screening meeting (special education process) if child is not making progress in IC case</i>
IC Program Development Tasks (district level)
<i>e.g., Prepare for district meetings; email to set up tech support dates; set county-wide meeting agenda</i>

Admin. Contact
Communicate with administrator
<i>e.g., Provide principal with my goals, give updates about IC, discuss sustainability/expectations</i>
Present to principals/school board

Admin Contact: Major inconsistencies, omissions, comments?

Training
Provide professional development to staff/faculty
<i>e.g., Attend monthly staff meeting; give updates to staff re: IC; clarify what IC is to others, create monthly newsletter for faculty, plan and provide professional development via presentations to staff; communicate with staff about IC; let people know what we do; get input from team, principal, etc for presentations; talk to staff and help them to see problems in a different way</i>
Coach/support members through cases
<i>e.g., Coach team members through practice cases, get members to start cases; encourage team members to have be observe their meetings with consultees; provide non-evaluative feedback; help others reflect; review with case managers before they meet with teachers; help case managers grow in their skills; process with case managers after they have met with teachers;</i>
Train new team members
<i>e.g., Partner up experienced and new team members; meet weekly with new case managers, provide half- and full-day training to new team members, do training sessions to get new members up to speed with experienced members; plan training around rotating team membership; ask veteran members to observe and mentor new members</i>
Provide on-going team-member training (content)
<i>e.g., Review and practice skills, teach Instructional assessment with students; teach communication skills; instruct team members to use forms/resources; provide training for reading cases; teach steps of the process; teach principals of learning; teach team how to do whole-class word search; teach from ICAT books</i>
Provide on-going team-member training in weekly meetings, and half/full day trainings (process)

Training: Major inconsistencies, omissions, comments?

e.g., Help others to reflect (i.e. on skills, process, meetings, etc); ask veteran members to mentor and observe new members; as team members to partner up to practice skills and share ideas; process sessions with consultants after they meet with teachers; complete/review SDF's as training activity; answer questions during case reviews; use modeling, role-plays, guided practice and direct instruction to teach skills; engage in individual training; ask members to share cases; ask for input/concerns/issues to inform training; review student work samples; provide feedback to team members; come up with new ways to review old skills; have team members provide training; share audio recordings of my meetings with teachers; team members observe me as case manager; meet with case managers when they start a new type of case

Facilitator Training
Attend and participate in facilitator trainings and meetings
<i>e.g., Attend networking meetings; attend state level meetings, county-wide meetings, district meetings, etc; attend session training; follow up with trainers with questions</i>
Engage in Peer Networking
<i>e.g., Act as a mentor for other facilitators in the county; help other facilitators with questions; provide feedback to others facilitators about their skills; share knowledge and info with other facilitators; practice skills with other facilitators; support other facilitators; collaborate with other facilitators about my own skills and questions; receive online coaching; practice assessment skills with other facilitators; receive feedback about my facilitation from others; talk to other facilitators about how they conduct training and discuss what works;</i>
Engage in other professional development activities to build own skills as a facilitator.

Facilitator Training: Major inconsistencies, omissions, comments?

e.g., Participate in training for making charts and graphs on computer; participate in Professional Learning Community and attend meetings about math facts, working memory, repetition with grade level tea; further my training as a facilitator; engage in book study (IC book; communicate with my buddy; receive tech support; participate in professional development for myself in case management and problem solving; attend teacher trainings so I have a knowledge of curriculum; receive small-group tech training as follow-up to session training; look for resources/info online (e.g., ICAT, university websites, searches for info on learning, behavior, etc); reflect

Performance Standards
Complete LOI (IC Program Evaluation)
<i>e.g., Interview IC Team at other schools, participate in interviews; coordinate interviews</i>
Review LOI data to inform team goals, planning, etc
Use ICAT tools for data entry and feedback
<i>e.g., Enter whole kindergarten class into ICAT tools; enter case data</i>
Engage in evaluation of my performance
<i>e.g., Complete school's evaluation tool; receive summative evaluation at end of year from administration; participate in state evaluation system; meet with principal and instructional specialist about my work; get observed by principal; complete end of year reports; receive thanks for work as facilitator (an informal measure of progress; meet with district coordinator to discuss my performance; set goal based on IC implementation data; rate myself on performance objective for tech support; keep data on my professional goal</i>

Performance Standards: Major inconsistencies, omissions, comments?

Conflict
Manage conflict between programs
<i>e.g., Role of RTI and IC in the same school</i>
Manage conflict between Case Managers and Consultees
<i>e.g., Mediate when teacher does not feel that student progress is enough</i>
Manage conflict between team members
<i>e.g., Deal with pretty things such as disagreements such as meeting times.</i>
Receive negative feedback re: IC
<i>e.g., Hear/deflect complaints; do not interpret negative reactions personally</i>

Conflict: Major inconsistencies, omissions, comments?

Additional School Responsibilities and “Extra Hand” Activities
Attend to other school tasks and other school responsibilities
Definition: Staff member has additional duties that are expected to be fulfilled on a regular basis as a part of their role as a school employee. These are not 'emergency' situations.
<i>e.g., Participate on other teams, conduct standardized testing, complete assigned duties (lunch, etc); present to staff on non-IC topics; attend and participate in special events</i>
Act as an extra hand
Definition: When the IC Facilitator assists in an 'emergency' situation in which a staff person is needed, regardless of their other role or specific skill set.

Other Responsibilities: Major inconsistencies, omissions, comments?

IC Program Development
Coach others online
Develop support network in district
Act as a trainer for others in IC
<i>e.g., Work with coordinator to help conduct Session training; provide tech support; plan county-wide meetings; attend session training; coordinate county-wide facilitators; help conduct new member training with coordinator; train new team members from other teams in count as a part of county-wide new member training; plan tech support for the district; attend training at ICAT Center with coordinator; shadow coordinate at new member trainings; work toward becoming a trainer of the process; lead sessions for case managers at district meetings; act as a mentor for other facilitators in the county</i>

IC Program Development: Major inconsistencies, omissions, comments?

Appendix I: Facilitator Role and Functions and Key Skills from IC Facilitator Training Manual

(Gravois, Rosenfield, & Gickling, 2007)

IC Team Facilitator

Key Task: To build a core team that is skilled in the IC collaborative problem-solving process

Role & Function:

- a. Helps initiate and introduce the IC process to the school
- b. Develops a team and delivery system, and facilitates the team in delivering services to the school
- c. Provides ongoing training to develop team members' skills
- d. Coaches individual team members in the Instructional Consultation process
- e. Works with the principal and key staff members to integrate IC into the school functioning

Activities:

- | | |
|---|---------------------------------|
| X | Planning IC-Team meetings |
| X | Conducting IC-Team meetings |
| X | Coaching team members |
| X | Case Consulting (modeling) |
| X | Receiving external support |
| X | Consulting with principal |
| X | Sharing information with staff |
| X | Assisting in program evaluation |

Key Facilitator Skills

Facilitator Tasks:

- Diagnosing individuals
- Diagnosing organizations
- Training
- Managing/ controlling
- Resource bringing

Socioemotional Skills that Support Change:

- Group functioning
- Trust/ rapport building
- Support
- Confrontation
- Conflict mediation
- Confidence building
- Collaboration

Interpersonal Skills:

- Interpersonal ease
- Administrative/ organizational
- Initiative taking

Knowledge:

- Educational general
- Content of innovation

Appendix J: Team Leadership Questionnaire (TLQ)

(Morgeson, DeRue, & Karam, 2010)

Transition Phase Leadership Functions

Compose team

1. Selects highly competent team members
2. Selects team members who have previously worked well together
3. Selects team members that have previously worked well with the leader
4. Selects team members so there is the right mix of skills on the team
5. Selects highly motivated team members

Define mission

1. Ensures the team has a clear direction
2. Emphasizes how important it is to have a collective sense of mission
3. Develops and articulates a clear team mission
4. Ensures that the team has a clear understanding of its purpose
5. Helps provide a clear vision of where the team is going

Establish expectations and goals

1. Defines and emphasizes team expectations
2. Asks team members to follow standard rules and regulations
3. Communicates what is expected of the team
4. Communicates expectations for high team performance
5. Maintains clear standards of performance
6. Sets or helps set challenging and realistic goals
7. Establishes or helps establish goals for the team's work
8. Ensures that the team has clear performance goals
9. Works with the team and individuals in the team to develop performance goals
10. Reviews team goals for realism, challenge, and business necessity

Structure and plan

1. Defines and structures own work and the work of the team
2. Identifies when key aspects of the work need to be completed
3. Works with the team to develop the best possible approach to its work
4. Develops or helps develop standard operating procedures and standardized processes
5. Clarifies task performance strategies
6. Makes sure team members have clear roles

Train and develop team

1. Makes sure the team has the necessary problem solving and interpersonal skills
2. Helps new team members learn how to do the work
3. Provides team members with task-related instructions
4. Helps new team members to further develop their skills
5. Helps the team learn from past events or experiences

Sensemaking

1. Assists the team in interpreting things that happen inside the team
2. Assists the team in interpreting things that happen outside the team
3. Facilitates the team's understanding of events or situations
4. Helps the team interpret internal or external events
5. Helps the team make sense of ambiguous situations

Provide feedback

1. Rewards the performance of team members according to performance standards
2. Reviews relevant performance results with the team
3. Communicates business issues, operating results, and team performance results
4. Provides positive feedback when the team performs well
5. Provides corrective feedback

Action Phase Leadership Functions

Monitor team

1. Monitors changes in the team's external environmental
2. Monitors team and team member performance
3. Keeps informed about what other teams are doing
4. Requests task-relevant information from team members
5. Notices flaws in task procedures or team outputs

Manage team boundaries

1. Buffers the team from the influence of external forces or events
2. Helps different teams, communicate with one another
3. Acts as a representative of the team with other parts of the organization (e.g., other teams, management)
4. Advocates on behalf of the team to others in the organization
5. Helps to resolve difficulties between different teams

Challenge team

1. Reconsiders key assumptions in order to determine the appropriate course of action
2. Emphasizes the importance and value of questioning team members
3. Challenges the status quo
4. Suggests new ways of looking at how to complete work
5. Contributes ideas to improve how the team performs its work

Perform team task

1. Will "pitch in" and help the team with its work
2. Will "roll up his/her sleeves" and help the team do its work
3. Works with team members to help do work
4. Will work along with the team to get its work done
5. Intervenes to help team members get the work done

Solve problems

1. Implements or helps the team implement solutions to problems

2. Seeks multiple different perspectives when solving problems
3. Creates solutions to work-related problems
4. Participates in problem solving with the team
5. Helps the team develop solutions to task and relationship-related problems

Provide resources

1. Obtains and allocates resources (materials, equipment, people, and services) for the team
2. Seeks information and resources to facilitate the team's initiatives
3. Sees to it that the team gets what is needed from other teams
4. Makes sure that the equipment and supplies the team needs are available
5. Helps the team find and obtain "expert" resources

Encourage team self-management

1. Encourages the team to be responsible for determining the methods, procedures, and schedules with which the work gets done
2. Urges the team to make its own decisions regarding who does what tasks within the team
3. Encourages the team to make most of its own work-related decisions
4. Encourages the team to solve its own problems
5. Encourages the team to be responsible for its own affairs
6. Encourages the team to assess its performance

Support social climate

1. Responds promptly to team member needs or concerns
2. Engages in actions that demonstrate respect and concern for team members
3. Goes beyond own interests for the good of the team
4. Does things to make it pleasant to be a team member
5. Looks out for the personal well-being of team members

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