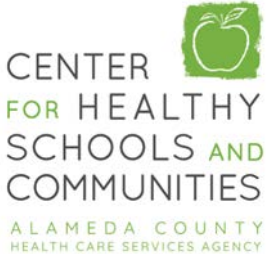




Coordination of Services Team Guide

Strengthening schools.
Supporting the whole student.





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The COST Guide Introduction

Background

Since 1996, the Center for Healthy Schools and Communities (CHSC) has worked to improve health and education outcomes for Alameda County youth by building school-based health and wellness opportunities. Our work extends beyond simply placing health services on school sites; it is rooted in purposeful, responsive collaborations with youth, families, schools, and surrounding institutions.

Together with our partners, we have created a continuum of supports and opportunities in schools that supplement the core instructional programs by promoting student wellness and removing barriers to learning.

Beginning in 2005, this collaboration has included the development and implementation of Coordination of Services Teams, or COST. Now a nationally recognized best practice,



This symbol indicates a tool.

COST is being used in schools and districts across the county; it continues to expand in number and quality. COST, and the strength-based approach it promotes, not only increases student access to services, but enhances young people's connection to the school and community, helping all the adults in a child's life better understand and support them.



How to Use this Guide

This guide serves as an overview and roadmap for school staff and partners interested in improving the coordination of student support services in an elementary, middle, or high school setting. It is also meant to support school staff and partners currently operating COSTs, or other types of access and referral teams, to strengthen their practice. The guide describes how to design an effective school-based COST, how to prepare and introduce school staff to COST, and how to implement and sustain COST successfully over time.

The guide is specifically designed to support two types of COST leadership: a single, dedicated COST Coordinator who heads up the team; and shared leadership, in which the coordination role is shared among two or more key people, such as a principal and social worker or nurse. Building a successful COST is a collaborative growth process unique to each school setting and staff team. Rather than prescribing a standard formula for how to run COST in every school community, the guide aims to provide a general roadmap and concrete, adaptable tools for starting and maintaining a COST in your unique school community.

The guide includes an overview section, a section on getting started, and a section on implementing the key components of COST. In each section you will find a detailed explanation of the topic, along with case studies, helpful tips, and a list of related tools.



Case Study: What COST Can Do

Cedrick is an 18-year-old senior in high school. He never met his father and was taken from his mother and placed in foster care when he was seven. Cedrick had been living with his adult foster brother who served as his guardian until his foster brother passed away unexpectedly in the middle of Cedrick’s senior year. Grieving and homeless, Cedrick went to his school’s assistant principal (AP) for support, and the AP referred Cedrick to the COST Coordinator. After checking in with Cedrick, the COST Coordinator brought the referral to COST, where the members organized and took the following actions:

- The parent liaison helped find shelter for Cedrick, took Cedrick to the food bank, and helped him sign-up for food stamps.
- The Coordinator and parent liaison contacted charities and church groups to pay for the burial service.
- The counselor provided therapy, and also worked with Cedrick on job searching and interviewing skills to help him be self-reliant.
- The nurse and the nutritionist provided nutritional and wellness support.
- The Health Center practitioners on campus signed Cedrick up for long-term medical care.
- The Coordinator, along with the college counselor and the AP, made sure Cedrick earned the required credits to graduate, took the SATs, and applied for college.

Upon graduation, Cedrick was accepted to a university with free room and board, majored in broadcasting, and got a part-time job. He told the COST Coordinator he was proud of being able to build a support system around him and that he was ready to turn a new page in his life. As for the COST members, they felt they never could have made such an impact without working collectively.

The What and Why of COST

What is a Coordination of Services Team?

A Coordination of Services Team (COST) constitutes a strategy for managing and integrating various learning supports and resources for students. COST teams identify and address student needs holistically and ensure that the overall system of supports works together effectively.

A COST is a multidisciplinary team of school staff and providers who:

- Create a regular forum for reviewing the needs of individual students and the school overall.
- Collaborate on linking referred students to resources and interventions.
- Support students' academic success and healthy development.

COST uses a centralized, easy-to-use referral system so that anyone in a school community can refer or self-refer students most in need of additional supports. COST then provides a structure for school staff, administrators, and school-based providers who may normally work in separate areas to come together to discuss the strengths and needs of students who need support. Together they develop tailored interventions that utilize the full scope of resources available in the school and community.

COST also creates a critical setting for staff and providers to reflect on the “landscape” of academic and social-emotional needs and supports available for students in a school community. This enables them to identify ways to improve school-wide allocation of resources to promote academic success, positive social-emotional development, and increased resiliency among all students.

What do COST Teams do?

- Identify students who need additional supports through a school-wide referral system.
- Assess referred students, and explore strengths and supports needed.
- Coordinate efforts to link referred students to appropriate supports by tracking progress and tailoring interventions over time.
- Assess learning supports and needs school-wide, make recommendations about resource allocation to the administration, and recruit new resources.

Why Start COST? What are the Benefits?

COST will strengthen your school's ability to support its students holistically. Having a COST maximizes and expands available resources, increasing your school's capacity to respond quickly and appropriately to a wide

range of student needs. With this enhanced support, more students are able to stay engaged in school and ultimately graduate healthy and successful.

COST improves coordination, communication, and collaboration across providers working on behalf of students, which leads to:

- Improved capacity to tailor interventions to each student's unique needs and strengths.
- Higher efficiency and use of limited resources.
- Increased sense of belonging and quality of services among providers on the team.
- Expanded range of universal and prevention services.



COST plays a critical role for schools and districts striving to build a strong continuum of supports for students under models such as the Response to Intervention (RTI) Framework. COST ensures universal access to preventive supports, and facilitates the design and timely delivery of early and intensive interventions. COST helps staff gain a better understanding of students needs, and increases the options available to support those needs before more intensive interventions such as Individualized Education Plans or 504s become necessary.

Additionally, COST members use data from referrals to assess the overall effectiveness of a school’s universal supports for positive academic and social-emotional development. Based on patterns they have identified, the team makes recommendations on how to strengthen these supports. COST helps improve a school’s organizational ability to serve students and to provide more equitable access to supports and resources.

What Makes an Effective COST Team?

The key logic behind COST is that students are better served by a structured collaboration among the range of professionals who work with students and families in different capacities and who may not normally work together. However, starting and sustaining COST is no small task; it requires a critical mass of vision

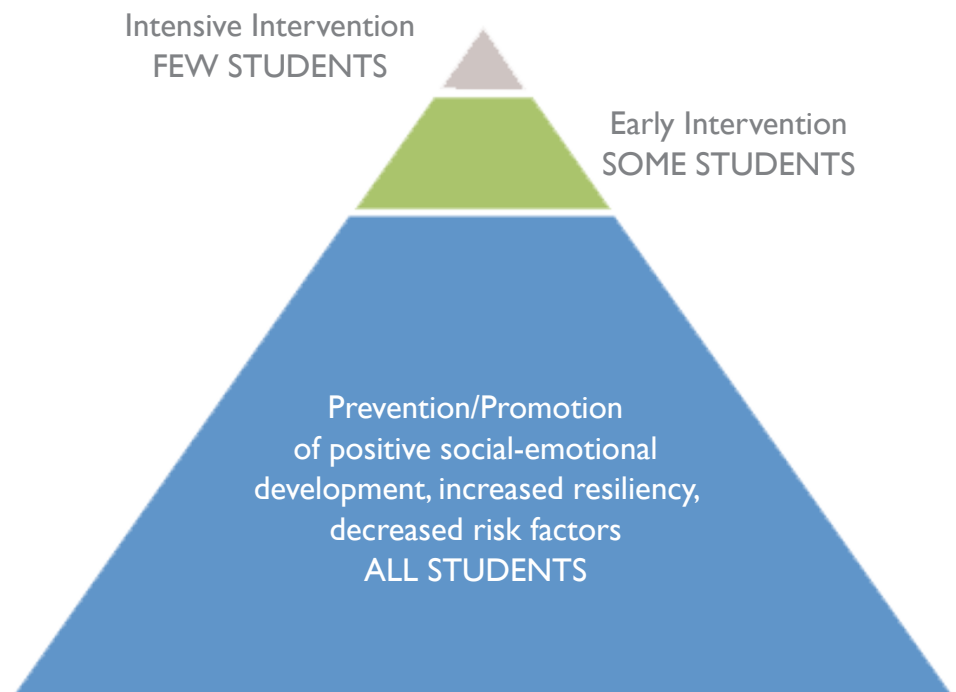
and desire for change among school leaders and key staff willing to build a team and its necessary infrastructure.

Support and initial buy-in from the school principal is a critical component of starting COST. Coordination is also essential – managing the referral process, facilitating the weekly COST meeting, and tracking the delivery of services and the progress of individual students. Many schools have a designated COST Coordinator who is responsible for the administrative aspects of COST. Others share the coordination duties among a small core of people, for example, the principal or assistant principal partnered with a community school coordinator, mental health clinician, counselor, or parent liaison.

However, as members of a team of multidisciplinary professionals working together in new ways, all COST members become active leaders of change within a school.

All student support staff are critical to COST. An effective team incorporates members from less-traditional support areas, such as after-school coordinators, parent liaisons, and college counselors. Teams can vary in size and composition, but a COST rich in perspectives, professional roles, and capacities creates a strong foundation for a system of supports that can address the needs of the whole child, and of the whole school.

Response to Intervention (RTI) Framework



What are the Components of the COST Service Delivery System?

Here are five core components that make up the COST service delivery systems.

1. An Easy-to-Use Universal Referral System

A universal, school-wide referral system is a critical component of COST. All COST teams need a way to consistently identify students and families requiring additional academic, social-emotional, or health support. Referral systems should be easy to use, and accessible to all members of the school community. Teachers, administrators, parents, providers, and students themselves should all be able to easily refer or self-refer.

2. An Intake and Assessment Process

After referrals are made, COST teams need a process to assess referrals and gather additional information about a student's situation that may be helpful for the team's discussion. Typically, the COST Coordinator, or the designated leads, follow-up with the person making the referral and/or the student and family, to prepare for the COST meeting and to identify issues that may require immediate attention. For example, if the Coordinator determines that a student or family is in crisis, they would confer with the appropriate school staff COST members to provide immediate support, before bringing the case to COST for long-term services coordination.



3. Regular COST Meetings

Regular meetings are critical for COST success; establishing a weekly or biweekly meeting time and standing agenda are key components of a strong infrastructure. Team members come together, review and discuss referrals, assign a lead to each referred case, and develop coordinated service plans when multiple services are appropriate for a student. The meeting is also a time to follow-up on previously referred students to track progress and changing needs. Ideally, the standing meeting agenda should also allow time for the team to discuss school-wide needs and resource gaps on a regular basis. For example, a COST that has seen several recent cases of students who are frequently absent due to a chronic disease, but who have never visited a school health center, may recommend that the school look at ways to better raise awareness among students and parents about health center resources.

4. Collaborative Service Delivery

COST encourages collaboration, not only in the development of coordinated service plans, but in the delivery as well. Members work together outside of meetings to align their efforts, address changing needs, and improve outcomes for their shared students. They also actively build and model a culture of teamwork.

5. Tracking and Evaluation System

After COST assigns a student case to a provider or group of providers, tracking the outcomes of that referral can be one of the most challenging aspects of service coordination. At a minimum, the COST team (via the COST Coordinator if there is one) should track which of the staff have been assigned to follow-up, when and how they have connected with the student, and what supports have been provided. It is important to understand and respect confidentiality rules, while confirming that the student has been connected to relevant supports, and that the interventions designed in a

COST meeting are actually implemented. A simple spreadsheet can help with this level of tracking. The next step is to monitor the student progress. Whenever possible, COST should utilize the school assessments, and provider tools, that are already being implemented. Finally, COST teams should design their own evaluation process to improve team function and effectiveness.

Components of COST Delivery System



What if My School is Different? Flexibility in the COST Model

The COST model is designed to be flexible and adaptable to a school's needs and assets. The first area of flexibility is actually the name – coordinated services teams are also called CARE Team, Star Team, Coordinated Services Team (CST), Student Assistance Program (SAP), etc. As long as the team is part of a multi-disciplinary approach to coordinating and maximizing resources to support student success and well-being, it is a “COST” model.

A high-quality COST can also vary significantly across types of schools (elementary, middle, high, and alternative schools) in any of the following areas.

Size of the Team. Usually the team will be bigger in larger schools or higher need schools with more student support staff and partners.

Scope of Responsibilities within COST. Leadership and administrative tasks can be shared collectively by COST members depending on the expertise and capacity of the members.

Nature of Services. Services provided by COST can range from prevention (i.e., school climate activities and restorative justice circles) to intervention (i.e., individual or group counseling), and can cover everything from after-school tutoring to food banks.

Number of Referrals. While referrals typically exceed capacity, the number of COST referrals is likely to be higher in a larger school serving a higher-needs population. Good outreach to teachers and the effectiveness of COST also leads to increased referrals.

Availability of Resources. Schools can vary dramatically in terms of internal and external resources. Two strategies to consider in building out supports, even in low resource areas are: 1) look to unconventional sources of support within the school such as a teacher who serves as a tutor at a local church; and 2) recruit outside providers to improve access, support, and coordination that maximizes effectiveness and impact.

Time Allocation in a COST Meeting. COST members decide on the best allocation of meeting time based on their priorities for the school, bandwidth, and the duration and frequency of meetings.

Outreach to Families. Intensity of family engagement varies based on the age and needs of students, with elementary school COSTs typically more family-focused



Cost Coordinator. While having a dedicated COST Coordinator is ideal, with strong infrastructure a COST can be successful under collaborative leadership. For example, coordination duties can be shared among members of a small team. An administrator can share the position with a special education professional. Instead of a Coordinator handling all the intake, case leads can be assigned to coordinate services for every referral reviewed by the team.

In these circumstances, having a consistent structure for COST meetings becomes especially important. Regular meetings, standing agendas, rotating roles, and a template for notes are all helpful in reinforcing this structure. Finally, it is critical to establish clear communication protocols for referrals, coordinating services, follow-ups, and check-ins with other team members and school staff.



Case Study: COST Leadership and Structure

At Evergreen Elementary School, the school social worker and behavioral health clinician have been sharing COST leadership for years. They have been able to maintain a strong COST despite multiple changes in school administration by:

- Establishing a consistent, weekly COST meeting time. The two COST leaders alternate facilitation; and timekeeping and note-taking duties rotate among members.
- Revisiting the COST meeting schedule when new administrators join the school, to accommodate, and encourage, their participation.
- Creating a universal referral process; alternating responsibility weekly for reviewing and conducting the initial review of incoming referrals.
- Making quarterly presentations at faculty meetings to update and troubleshoot with staff on the referral process, school-wide trends, and resources/resource gaps.
- Establishing strong communication systems to facilitate collaboration, including clear lines of communication among providers and school staff, shared responsibility for follow-up between meetings, and an inclusive email list for meeting updates, school-wide events, etc.
- Keeping a record of students served and their status, which the team reviews monthly to improve accountability and a shared sense of purpose.

Getting Started: Setting-Up for Success

Preparing Your School for COST

Taking the time to understand your school's current organizational culture and student support systems is an important first step. This is especially important if one of the COST leaders is from a partner organization, and therefore, less immersed in the school culture.

Building COST is a complex task. While everyone is in favor of the idea of coordinating services to better support students, the practices and systems needed for this level of collaboration require a shift in how people traditionally operate in schools. As with any change, it is critical to be both strategic and persistent.

Building COST consists of three main steps: assessing the school culture

and readiness for COST, introducing COST to the school, and building the COST team. While the steps are presented in chronological order for a brand new initiative, COST leaders may tackle several of these steps at the same time, or it may be necessary to return to different steps at various times due to changes in leadership and staff turnover, or as part of a continuous improvement effort.

Assessing School Culture and Readiness

For COST to become an integral part of the operational structure of the school, it must align with the school's organizational culture. However, organizational culture is hard to define. Some may define it simply as "the way we do things around here," while others say it is their organization's "overall character or personality."

Organizational culture is found in formal and informal policies, in written, spoken, and unspoken norms. What is agreed upon, is that organizational culture is real. It is usually unique to an organization or school, and it is a powerful lever for guiding behavior. Therefore, assessing how the current organizational culture will both support and hinder the creation of COST is an important step in planning implementation, in strengthening an existing team, and in gaining buy-in from key stakeholders. Here are a few issues and questions to consider when trying to assess the organizational culture of your school:

Key Stakeholders and Potential Champions. What does your school's principal know about COST? Who are some of the key staff members or providers that will need to participate in COST for it to be effective? Who else will you need to enlist in order to implement COST successfully? Are there currently any champions of COST in your school that can help orient others and provide recruiting support? If not, try to identify who you want to recruit to become those champions.





Case Study: Preparing and Launching COST Version 2.0

When a new COST Coordinator, Ms. Valdez, came to Maven Middle School, she found that although the school had a COST team, the entire process lacked structure and coordination, which meant that students were not being supported well enough to succeed. So she started back at the beginning – assessing the school culture and mapping the current systems in order to identify needs and priorities. She talked to administrators, teachers, and student support staff about the existing processes for identifying and supporting students.

The biggest gaps she identified in the system were in the basic COST components: a centralized referral system, organized COST meetings, and a tracking system. She also found the need for school staff to be engaged in and educated about the COST process and supports. Over the next year, Ms. Valdez re-introduced the school to COST, and built a structure to address all of those needs. For example:

- She centralized the referral process so that all concerns came to COST first, then they were triaged, and later they progressed to an SST or IEP if needed.
- She adapted the COST referral form to include the interventions that had already been tried in the classroom in order to support a shifting paradigm that emphasized a teacher's role in supporting struggling students.
- She structured the COST meetings by including a standing agenda, a note taker, clear assignments, and point people. To build a positive climate she got the team to take turns bringing food to the meetings.
- She recruited new partners to provide needed services, including mentors from local colleges, and created an attendance team to do home visits and work with families.
- She created various tracking tools, including a comprehensive COST tracker for interventions provided by the team and sign-in sheets for programs not previously monitored.

Re-starting COST took considerable education and relationship building with school staff and partners alike. Ms. Valdez worked with the administrative team to develop a clear and shared vision for COST and established a weekly meeting with the principal. She got to know the teaching staff, learning why they started teaching, what they liked about the school, and what support they needed. Then she progressed to questions about COST. What would make the process work for them? How to refer? What was the best way to communicate?

She also gained a lot of education in those formal and informal meetings by building the staff understanding of COST and shifting the culture to one of shared responsibility for the success of students. Teachers were now expected to try three interventions before referring a student to COST, and Ms. Valdez supported them with these strategies. As she recruited and orientated new partners, she stressed that the work of the team would entail both providing expertise and working directly with students and families.

Throughout it all, Ms. Valdez stayed positive and strength-based. Two years later, the school has a high functioning COST, increased resources, steady improvement in student outcomes, and a culture of shared responsibility for supporting student academics and well-being.



Related Tools

- Training: Crafting an Elevator Pitch
- Training: COST 101 Powerpoint
- Handout: COST Overview
- Handout: COST vs. SST

School-Wide Mission, Vision, and Goals. What is the vision and mission of your school? What are the goals outlined in your school site plan? What specific priorities does your school leadership regularly articulate to staff and providers? Are there any specific mandates affecting your school community and influencing its goals? These goals may or may not be explicit, but knowing what school administrators are focused on, and demonstrating how a COST infrastructure can support these goals, will help you gain buy-in from school leadership.

Shared Values in the School. Before you recruit COST members, spend some time getting to know the school staff and providers. What motivates them? What excites them about their work? What are the major values the school expects all staff and partners to share? Are they the same for the students? For example, in a school

community with a strong emphasis on equity, COST can play a critical role in identifying school-wide issues, such as bullying or access to healthy foods, that are affecting some groups of students more than others. Once you have identified issues, COST can help build solutions.

Formal and Informal Protocols.

Finally, consider the organizational protocols – both spoken and unspoken – that are active in your school. What are the expectations for time spent in meetings? Is there a morning bulletin? How do teachers use email? What are the mechanisms for informal communication among staff? How are partners involved in meetings and communication? When and how do administrators need to be informed about student incidents or issues? COST leaders should keep these protocols in mind when designing COST systems such as referral, intake, and tracking.

Mapping Existing Systems

In assessing school readiness for COST, it's important to coordinate existing systems of student support.

Whether your school has fledgling or well-developed systems, the goal of COST is to create a coordinated infrastructure for identifying, assessing, and supporting student needs. Its referral system, for example, should serve as the school's central referral system to assess student needs; and COST meetings should serve as the primary place to assign support to students.

The assessment should include mapping not only current partnerships and resources, but also the school's mechanisms for coordinating services, communication, and follow-up. Be sure to coordinate the following student support systems, and look at how COST can connect systems and fill gaps:

- Student Support Teams
- Referrals for IEPs and other special education processes
- Disciplinary referral systems

This research will inform the development of a COST structure that is an essential part of the school's daily functions, rather than “one more meeting” for staff to attend during their busy days.



Introducing the School to COST

It is important to let key stakeholders and staff understand that COST is not a stand-alone initiative, but rather a tool to organize the resources of the school and its partners to better serve students and support the school's and the community's goals and values.

For example, the school may have a specific focus on closing an achievement gap or promoting meaningful family engagement. Thinking about how COST can also support these goals will help gain buy-in and participation from the school community.

In this early stage, COST leaders are ambassadors of a new model. They should be strategic about how they introduce the concept to different stakeholders.

Here are some examples of how you might begin a conversation about COST with various staff or partners, depending on their priorities:

- COST improves student achievement by reducing barriers to learning.
- COST is a one-stop shop for getting your students the resources they need.
- COST works collectively to link students to academic, health, and family support.
- COST supports equity by creating a means for all students to have access to the support and opportunities they need to be successful.
- COST is a new structure for coordinating the resources we have on campus and in the community to ensure that students, families, and teachers have the support they need.
- COST is bigger than the sum of its parts – we can make an impact together that we could never achieve individually.



Related Tools

- Form: COST Rubric

Building the COST Team and its Capacity

Once there is support from key stakeholders (and hopefully a few new champions), the COST leader is ready to begin building the COST team. An ideal COST team has representation from various student support staff and providers on campus. Size, membership, and even structure will vary; but in order to be effective, the team should reflect a cross-section of the critical programs serving students, and aim to give equitable voice to the different staff and programs. The four basic elements to building a strong COST team follow.

Select and Recruit Members

When building a COST team, take inventory of the staff, providers, and partners providing services to students and families on campus. Collaborate with the principal and other key school leaders to determine who should be part of the team. Consider inviting representatives from different stakeholder groups who will be committed to the COST model. Student support staff, such as school counselors, clinical case managers, and administrators are usually crucial to COST; however, don't forget about parent liaisons or afterschool providers who work with students and families but may not be as visible during the traditional school day.



Consider:

- Principal or other administrator
- Counselors
- Teacher representatives for grade levels, departments, SSTs, 504, etc.
- School nurse
- School psychologist
- Special education staff member
- Parent liaison
- Social workers or clinical case managers
- After-school providers
- Family resource staff (on or off campus)
- School health center staff
- Other student or family support providers (school-based or community-based)
- Unconventional roles, such as a teacher who serves as a tutor, a sports coach who is involved in the school community, etc.

Each member is a building block of COST. When getting started, it is a good idea to begin with members who are most aligned with the approach, then to build on that foundation to recruit others who are potentially valuable to COST but are not yet completely on board. The recruitment stage is a good opportunity to share the vision, team-orientation, and expectations of COST members. So be intentional about how people are oriented as they are invited to join the team.

Build the Capacity of COST Members

The beauty of COST is that it brings together diverse members of a school community to work together to support students and families in new ways. As with any new team, members may need coaching and support around how to work together. Some members may need encouragement about what insights and expertise they bring to the team; while other members may need encouragement to keep an open mind to the different supports and services that might be useful to a student. It's important for the COST Coordinator to inspire, encourage, and challenge team members to reach new heights as service providers.

COST also serves as a learning community in itself, with members doing collective work and learning best practices from one another. When team members feel confident about their abilities, have confidence in each other, and are working toward common goals, COST can achieve a “unity of will” that overcomes obstacles and accomplishes results.

Create a Positive COST Culture

This may be the most powerful step in maintaining an effective COST and preventing burnout. A positive COST culture is one of both mutual accountability and positive reinforcement. In addition to developing strong

protocols and systems, COST leaders should work to create a trusting, productive environment where the perspectives of all members are valued. COST culture should reinforce the shift from individual responsibility to collective action. The leaders always work to strengthen the culture within the team while deepening alignment with the school culture.

COST can facilitate accountability by recognizing the contribution of individual members toward shared outcomes for students, and for the team overall. The COST leader uses the impact of the team's work as a way to acknowledge both effectiveness and collaboration. Bringing up the names and faces of the students that COST has successfully supported provides a powerful reminder of the value of teamwork. COST leaders model positive reinforcement and encourage team members to give one another reinforcement to promote team chemistry. As team identity builds, team members will remind each other of their impact, and further strengthen the morale and cohesion of the team.



Develop a COST Continuous Improvement Process

Once COST starts coordinating and delivering services, how do you know if it's working? And how can COST improve to better serve your school's students? As with any major intervention strategy, COST teams should engage in a continuous improvement effort that examines how the team can function more effectively. This step is different in nature than the evaluation process of service delivery, which is focused on tracking service delivery and student outcomes. While that information is helpful in gauging the team's effectiveness, the continuous improvement process focuses on assessing and improving the team dynamics and structure.

The continuous improvement process can help the team improve communication, strengthen systems, and identify areas of improvement.

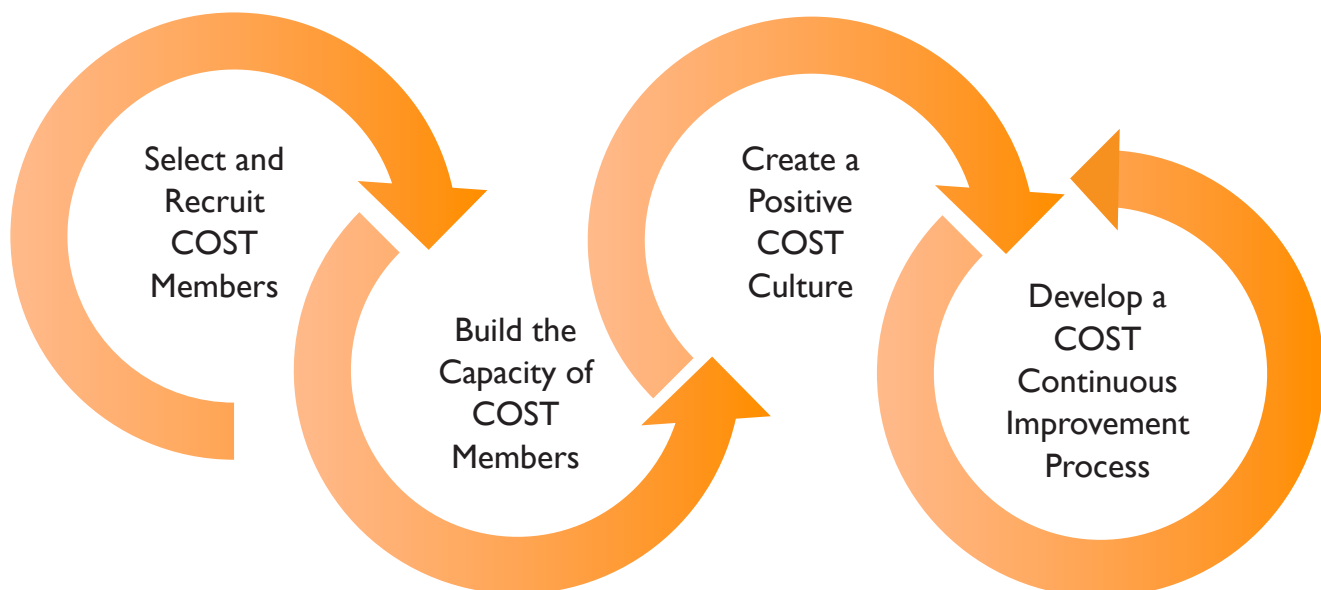
Every COST should design its own evaluation process to reflect the unique work of the team. Here are some questions to consider:

- How representative is COST of different student and family support services?
- How well is COST leveraging the diverse perspectives and experiences in the team?
- How well is COST understood by the school community? What are the trends in referrals – do some teachers refer more than others, and how appropriate are the referrals?
- How well are we using COST meetings to implement key functions (i.e., new referrals, follow-ups, school-wide trends) strengthening COST systems? How smoothly are the meetings conducted?
- How well are we tracking services and coordination?
- What is the process to assess the effectiveness of the COST service coordination and delivery?

- How do we use qualitative and quantitative information to tell the story of the impact of COST on students and families? Are students and families being asked how COST impacts their lives?
- What is the process for identifying resource needs? How well are we identifying school-wide trends or gaps? How are we addressing them?

Including all COST members in the design of the evaluation process will promote accountability and foster sustainability. A strong COST will be intentional in building, improving, and sustaining the team along with coordinating and enhancing services.

Building the COST Team and Capacity



Implementing the COST Service Delivery Components

There are five components of a COST service delivery system. These continue to be developed and improved to ensure that students are identified and connected to resources.

While these components are presented chronologically, they are often developed simultaneously, and should continue to be revisited and refined.

1. Building a School-Wide or Universal Referral System

A key ingredient to service coordination success is a clear referral system that is easy for all members of the school community to use – teachers, support staff, administrators, security, partners, parents, and youth.

A COST referral system should:

- Be the single initial referral point for concerns about a student's academic, social-emotional, physical, and family well-being. After COST review, the referral may be sent to another support team, such as SST or the behavioral health team.
- Have a standardized referral form. This form should be easily understandable, accessible within the school (at the front desk, teachers' lounge, family resource center, online, etc.) and translated into different languages, if necessary.
- Be brief enough so that the time it takes to complete a referral does not deter school community members from using it.
- Be confidential to protect student information (see HIPAA/FERPA notes in the Tools section for more information).
- Include information about what follow-up the person completing the referral should expect so that the school community members know their referral has been received. This follow-up may be a standardized

note in their mailbox confirming that COST received the referral. The note may also indicate further action (such as the date the referral will be reviewed by COST, a request for a follow-up meeting with the person who made the referral, or in some cases, reasons why a referral was not appropriate). Follow-up may also be in the form of a brief check-in by the COST leader, in which case, similar information might be shared. Referral systems work best when the person making the referral knows that it will be received, read, and followed-up on in a reasonably prompt manner.

The COST team should be proactive in ensuring that everyone in the school community is aware of COST and knows how to use its referral forms. The whole team can play a role in the community-wide education.

Discuss, as a team, where referral forms should be available to make sure everyone in the school has access to them. Ensure that there is a clear and confidential way to return referrals to a designated mailbox or COST member. Divide the task of checking in with every staff member and partner to introduce and troubleshoot the referral process. Take advantage of faculty meetings, partner meetings, parent nights, and other events to ensure that all members of the school community know about the referral process for COST. Reinforce the referral system at every opportunity.



2. Setting-Up an Effective Intake and Assessment Process

After referrals are made, there needs to be a process to assess referrals and gather additional information about each student's situation that may be helpful for the team's response. This may involve reviewing the referral form; interviewing the referral party; and checking in with the student, family, and/or other support providers. Ideally, the COST Coordinator or a designated team member should have a procedure in place that ensures referrals are reviewed on a daily basis. The COST intake and assessment process serves two important purposes: triage and meeting preparation.

Triage. First and foremost, this is a triage process. Referrals about urgent student needs cannot go unaddressed between meetings. While it should be emphasized that COST referral forms are not appropriate for student emergencies or crises (a follow-up referral can be made afterwards), a successful COST will be the first point of contact for crises, either through the referral form or an in-person request. If a student or family is in crisis, COST members can work together to provide immediate support, and then bring the case to the team for longer-term support. On the other end of the spectrum, in large schools with a high volume of referrals, COST may need to prioritize discussing the most



Related Tools

- Form: COST Referral Tracker
- Form: COST Referral Follow Up Note
- Tip Sheet: Confidentiality and Information Sharing

complex student cases at team meetings. They can then work individually with providers to ensure that students with more straightforward needs are connected to appropriate supports.

Meeting Preparation. The intake and assessment process also provides background information for the regular COST meetings. When an initial review has been done prior to the meeting – by the COST Coordinator or team members – the team will be better equipped to use meeting time to discuss supports and solutions.

Here are some questions to consider when building a process to assess referrals as they come in:

- How often will referrals be collected? Who will review them?
- What will the protocol be if a referral is for an emergency situation?
- Will all referrals be discussed in COST? If not, what will be the procedure for screening which referrals to bring to COST and which to immediately refer to an individual provider?
- What type of records will be kept on referrals that come in?

3. Creating Regular Meetings with a Consistent Structure

How do you make a one-hour meeting so efficient and effective that members are excited to attend every week? That is the question COST leaders need to keep in mind when designing the structure of the meetings. Having clear objectives, a consistent meeting structure, and strong facilitation are key places to start.

Remember that there are usually multiple objectives at COST meetings, namely to coordinate services for students, identify school-wide needs and gaps, and build collective working relationships among members. The following strategies will help COST meetings support those core objectives.

Set a Regular Weekly or Bi-weekly Meeting Time. A regular meeting time ingrains COST as part of its members' professional routines. Some schools even manage to keep their COST meeting at the same time and day from year to year for continuity. In large high schools, where scheduling can be particularly difficult, COST meeting times can be creatively organized, i.e., reviewing referrals by grade level so deans, administrators, etc. can attend for the time relevant to the students they support.

Develop Team or Group

Agreements. Developing group agreements should be done at the first or second COST meeting. Agreements should include the standard guidelines for how people interact constructively, i.e., one person talks at a time, etc.

What kind of atmosphere does the team want to create, and how will they know when they have achieved it? What will help members thrive on this team? How will the team deal with conflict when it arises? How will decisions be made?

Effective group agreements are revisited often – put issues on the agenda; reflect on how the team is doing on the agreements; pick one to focus on for a specific period of time; ask new members to contribute to them.

Keep a Standing Agenda. Having a consistent agenda format improves the quality and efficiency of meetings. Team members know what to expect and get familiar with the

flow of the meetings, i.e., reviewing referrals, follow-up discussions, team improvement conversations. Given the complexity of COST, standing agendas can have flexibility built in. For example, a one-hour meeting could include time slots for four new referrals (ten minutes each), two follow-up cases (five minutes each), and ten minutes to discuss a systems topic, such as referral trends, resource gaps, or communication among COST members. Some teams find it useful to put their group agreements on the agenda, or meeting objectives, either overall for the team or specifically for that day's meeting.

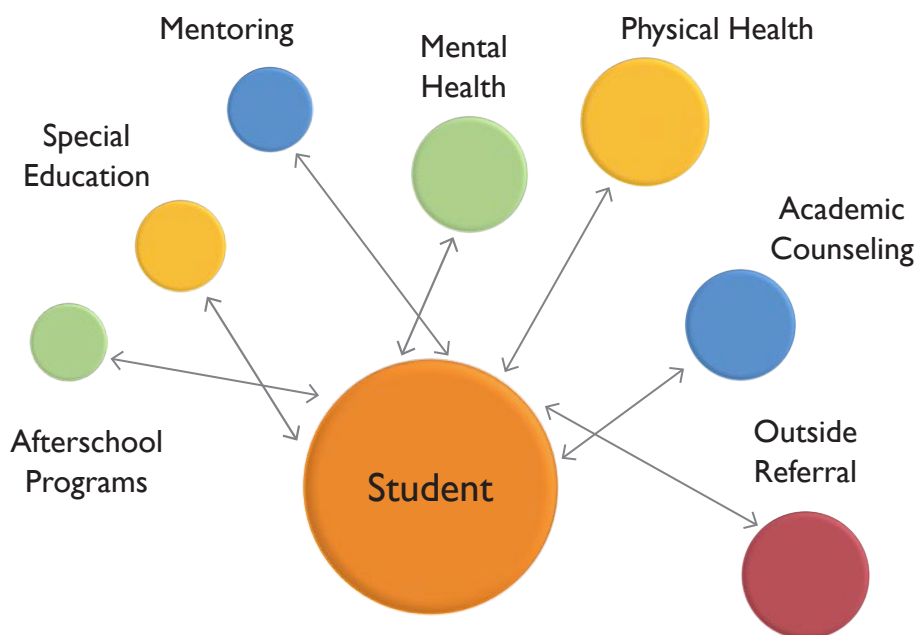
Start and End Meetings

on Time. As simple as this is, it can go a long way to ensure that members continue to participate on COST. Establishing strict and clear time management protocols not only helps the team review multiple referrals but will help members feel that there are fair and regular procedures for meetings and reviewing cases.

Maintain a Culture of Respect Where all Opinions Are Heard and Valued.

This is a simple principle, but it takes conscious attention from the COST leaders/facilitators and the team as a whole. Building on the group agreements, a COST leader should establish an atmosphere of respect among all members so that everyone feels valued and is comfortable contributing their thoughts and perspectives. Basic facilitation techniques, such as round-robins, sticky dots, open brainstorming, appreciation activities, and even talking sticks, will help ensure that all members are able to engage.

Before COST





Related Tools

- Form: COST Tracking Student Contact and Coordination

4. Ensuring Collaborative Service Delivery

COST encourages collaboration, not only in the development of coordinated service plans and resources, but in their delivery as well. Once a referral is reviewed and assigned in COST, the members who are part of that student’s service plan are responsible to coordinate among themselves. This is the most complex component of COST because it involves members seeing themselves as a cohesive team, and making the time to coordinate their efforts. The coordination work is not explicitly visible at the COST meeting but it underlies the core values and brings the collective spirit to COST.

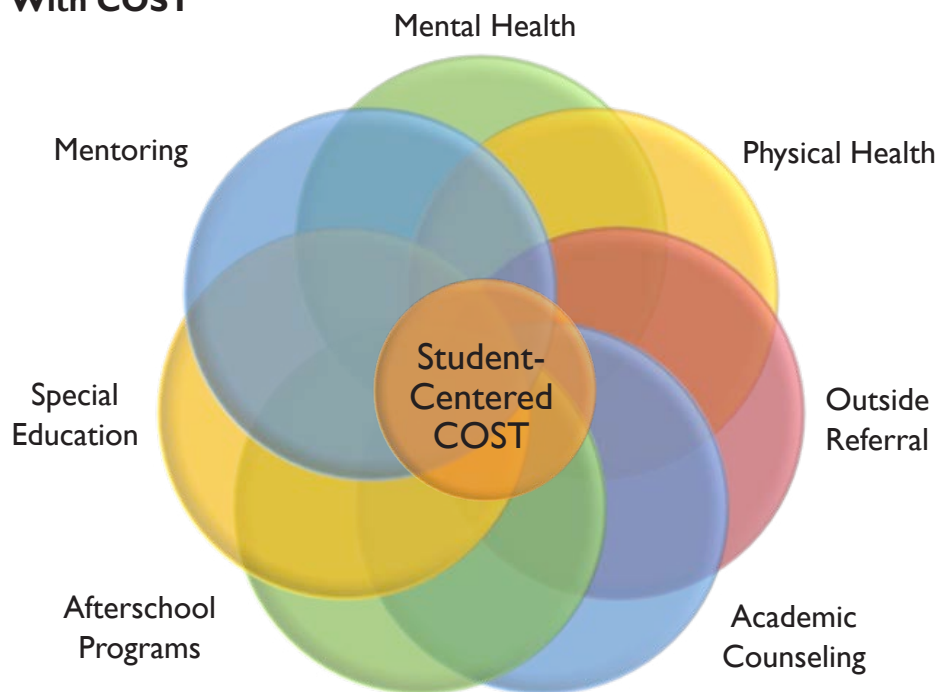
Some best practices of collaborative service delivery include:

- Assign a point person, or case manager, for the members who hold ultimate responsibility for coordinating the team.
- Hold regular check-ins among members of the student’s “service team.”
- Evaluate and adjust interventions and support strategies.
- Provide peer support and shared problem-solving around student needs.
- Support each other by reducing isolation and recognizing successes.
- Provide a unified voice to advocate for recommended strategies, resources, etc.
- Provide professional development and coaching to individuals and the team as a whole to build their capacity to work collaboratively.

5. Establishing a Tracking System for Evaluating Success

After COST assigns a student case to a team member or service team, tracking the outcomes of that referral and the student’s progress is critical. At a minimum, the COST team should track which member of the staff has been assigned to follow-up, when and how they have connected with the student, and what supports have been provided. COST may use paper-based or electronic tracking tools to follow the progress of referrals, and to record meetings between staff and the student, as well as meetings between team members. Written tracking sheets can be a helpful way for the COST leader to ensure that COST members follow through with referral plans designed during meetings.

With COST





Related Tools

- Form: COST Referral Tracker
- Form: COST Tracking Student Contact and Coordination
- Form: COST Client Evaluation

NOTE:

For confidentiality reasons, these tracking sheets should not contain any information about the student's case. They are used to track coordination of services, not the progress of the case itself.

The next stage in evaluation and tracking is more complicated: tracking student progress. Ideally, this entails identifying measureable outcomes for each one of a student's presenting issues, and a clear method of assessing progress on those outcomes throughout the year. For example, if one presenting issue is chronic absence, the measureable outcome might be a 10% reduction in absences or a month with fewer than three

missed days, and the measurement would be their attendance record. If another presenting issue is withdrawn behavior, the clinician might identify four target outcomes, and the measurement would be the clinician's report of progress on the outcomes. To protect confidentiality, the clinician would not share the diagnosis, treatment goals, specific interventions, or response to interventions, but they would share that they were working with the student on a specific number of outcomes, and on how many they have shown progress on. Regardless of whether the student is being served by a large team or an individual provider, tracking and reporting on progress toward outcomes enables the team

to leverage their diverse expertise to adjust and tailor interventions to increase impact or meet changing needs.

One of the other critical functions of a COST, where so many perspectives are present, is the identification of emerging needs or school-wide trends that need addressing, such as cyber-bullying or incarcerated parents. A consistent tracking system helps teams synthesize the main reasons for COST referrals, and in conjunction with their own observations, guide discussions of school-wide needs and prevention/early intervention strategies.



The COST Tools

The following tools can help you start to improve COST. All of the tools included in the COST Toolkit are available online at: achealthyschools.org/resources

Presentation (PDF)

Introduction to COST

Handouts (PDF)

1. COST Overview
2. COST vs. SST

Tips Sheets (PDF)

1. Confidentiality and Information Sharing
2. Leading COST without a Dedicated Coordinator
3. Standing Agendas for COST Meetings

Training Materials (PDF)

1. COST Mock Scenario Activity
2. Crafting an Elevator Pitch Activity

Forms (Word/Excel)

Available as editable Word or Excel docs:

1. COST Client Evaluation.docx
2. COST Confidentiality Form.docx
3. COST Meeting Agendas.docx
4. COST Referral Form.docx
5. COST Referral Tracker.xls
5. COST Referral Follow-Up Note.docx
6. COST Rubric.docx
7. COST Tracking: Student Contact and Coordination.xls



About Us

As part of Alameda County Health Care Services Agency, the Center for Healthy Schools and Communities (CHSC) has worked for over 20 years with school districts, community partners, youth, families, and policymakers to build school health initiatives that create equitable conditions for health and learning. Together we have developed 28 school health centers, expanded behavioral health supports to over 190 schools, built and lead operations of the REACH Ashland Youth Center, supported youth wellness and family partnership initiatives, and implemented targeted equity strategies for youth furthest from opportunity. Our school health programs and partnerships address urgent health and education inequities and create opportunities for all young people to cultivate their strengths, resiliency, and promise. We focus on supporting the physical health of students – knowing that students can't learn if they are sick, hungry, or absent from school. But we also focus on other aspects of wellness that youth and families need to thrive: social, emotional, spiritual, intellectual, environmental, and occupational. For more information about CHSC's work, please visit our website at ahealthyschools.org



How It Works

Look for the School Health Works icon anywhere on the CHSC website to find resources, tools, guides, and videos to help health and education leaders to build school health initiatives.

ahealthyschools.org/resources