



**inclusion
matters!**

SECTION 15

Moving to the Next Grade

Moving to the Next Grade

Transition is a natural part of all educational programs. Students with and without disabilities are expected to adjust to changes in teachers, classmates, schedules, building and routines.

- Preparation for transition might begin early in the spring. Whether a student is moving to a new classroom or to a new building, it is helpful to identify the home room teacher, or general or special educator who will have primary responsibility for the student.
- Once the receiving teacher is identified, involve this person in the annual Individualized Education Program (IEP) process so that they may gain information about the student's current level of functioning and can provide input into projected goals.
- Written transition plans may facilitate the student's successful movement. A meeting could be conducted to allow key participants to exchange relevant information. Clearly stated responsibilities and timelines for individuals involved in the transition is helpful.
- Either during the annual IEP or at the transition planning meeting, information might be exchanged about effective instructional strategies, needed modifications and adaptations, positive behavior support strategies, and methods of communication. The receiving teacher would benefit from learning about the strategies that have worked in the past so that precious time is not lost at the beginning of the new school year.
- The receiving teacher may find it helpful to observe the student in his/her current classroom or school setting. This will provide important insight into the student's learning style and needed supports.
- Early identification of Instructional Assistants who will be involved in the student's daily education would be helpful to begin to educate and inform them of their role in the student's education.
- Many teachers may not have previous experience with students with disabilities. Therefore, they might need basic information about disabilities disorders and about how the student's disability impacts the student with whom they will be working. Student-specific information about learning styles, communication systems, medical issues and behavior supports is also critical. Remember to include cafeteria workers, custodians, bus drivers, the school secretary, and the school nurse in the training. Classmates of the new student also may need information. This should be provided in a respectful manner and without stigmatizing the student with autism spectrum disorders.
- Before entering a new school, work to alleviate any anxieties the student may have about the new setting. Preparation for this move can be facilitated by providing the student with a map of the school, a copy of his/her schedule for the fall, a copy of the student handbook and rules, and a list of clubs/extracurricular activities.
- Develop a video about the new school and provide written information about specific situations so that the student can learn and rehearse for the change at his/her own pace.
- Visitations might be conducted to allow the student and his/her family to meet relevant school staff, to locate the student's locker, and to become familiar with the school culture.
- Identify key people or a mentor the student can contact if she/he is having a difficult time adjusting or understanding a certain situation. It may also be helpful to find a location where the student can go to relax and to regroup. Provide the student with a visual menu of coping strategies.

- Consider sending families information about bus schedules, parent-teacher organizations, and available resources (e.g., counselors, social workers, nurses) as soon as possible.
- Prior to the new school year, it will be helpful to establish methods and a schedule for communicating between home and school. Suggestions for maintaining ongoing communication include journals, daily progress notes, mid-term grades, scheduled appointments or phone calls, informal meetings, report cards, or parent-teacher conferences.
- Once in the new school, ask for peers who are willing to help the student with the transition and acclimation to the new school. By gaining the support of a friend without a disability, the student with a disability may have greater access to social opportunities during and after school.

The ultimate goal is to promote a successful experience for both the student and the rest of the school community. By systematically addressing the transition process, students can be prepared to participate in their new school experience.

Adapted from Pratt, C. (2000). Planning for successful transitions across grade levels. Bloomington, IN: Indiana Resource Center for Autism.

What works for all ages/stages (not a complete list – check with your team if they have additional ideas!):

1. Visiting the new building/site more than once
2. Meeting the new teachers/staff 1:1
3. Video modeling
4. Social Stories
5. Prepping video for receiving staff

Moving on to the Next Grade Within the Same Setting:

To help support success and a fluid transition, here are some strategies/techniques that would support that success:

1. Getting to Know You Form...Student Information. Scheduling end of year meetings with team and receiving team and parent
2. All About Me Books
3. Accommodations breakdown and assignment (team meeting end of school year and again before next year starts)
4. Assistive Technology debriefing – determine training needs before next school year
5. Team meeting to determine if need Awareness Training for next class

Transitions to New Buildings/New Settings

Transitions for families between programs (EI to EC), between buildings (EC to K, Elementary to Middle School, Middle School to High School and High School to Postsecondary) can be extremely intimidating. Success starts with proper and systematic planning and input from sending teams, from families and from the student. Below are some examples of checklists in being used to help support each of these transitions. Please note that each checklist is uploaded if viewing this on the SSD website. If reading this as a print copy, please visit Inclusive Education on the SSD website at www.ssdmo.org for the checklist or references that have not been included:

Moving from EI to ECSE

1. Transition Checklist from Indiana
2. Transition Checklist from DESE and MPACT

Moving from ECSE to K

1. Transition Checklist from Circle of Inclusion

Moving from Elementary to M.S.

1. Cambridge Middle School Transition Process Checklist

Moving from Middle School to High School

From the book *Asperger Syndrome and Adolescence* by Myles and Adreon) Creating a Successful Middle and High School Experience for Youth with Asperger Syndrome

Moving from High School to Postsecondary Outcomes

1. Visit Step 3: Planning for Adult Life – Special School District Website - <http://www.ssdmo.org/step3.html>

For additional information on Transition between grades and sample plans, please visit the Inclusive Education page on the SSD website.

Getting To Know You...Student Information

The form can be utilized by Educators as students make transitions to new teachers.

Please fill out this form to facilitate the transition for:

Student Name:	
Grade/School:	
Name of person completing form:	
Date, role or position:	
1. What did you enjoy about the student?	
2. What are some of the student's strengths, gifts, accomplishments	
3. What specific teaching strategies and learning style needs should be addressed for this student?	
4. What are the students learning objectives?	
5. If relevant, what are some supports that prompt appropriate behavior in the classroom and during transitions between activities?	
6. What strategies have not worked in the past?	
7. Who are the student's friends? Will at least two of them be in the same classroom?	
8. Briefly describe some of the ways the student participates in general education classrooms. Include adaptations, peer supports, assigned roles or jobs, etc.	

TRANSITION CHECKLIST

Attachment 1

(Use this checklist to help you keep track of what steps have taken place)

Planning ahead:

- First Steps discussed with us the federal child find requirement to send the child’s name, date of birth, and family contact information to the school system 18 months prior to our child’s third birthday, during procedural safeguards discussion at Intake and before the child reaches 18 months of age.
- First Steps transmitted to the school system, with our written consent, our child’s records, including the most recent IFSP and evaluation information, six months prior to our child’s third birthday.
- Transition conference has been scheduled at least 90 days before my child’s 3rd birthday.
- Community resources have been located.

Transition Conference:

- Parent’s rights in special education were explained.
- Options for early childhood special education and other appropriate services were discussed.
- A transition time line was developed.
- A transition plan with an outcome for transition was written into the IFSP.

Evaluation:

- We signed consent for evaluation.
- Records from Early Intervention Services were received at school.
- Information from our family was considered.
- Evaluation by the evaluation team was completed and the case conference committee meeting was convened within 60 instructional days and by the 3rd birthday.

Case Conference Committee meeting:

- The CCC meeting was scheduled with adequate notice.
- Discussion and decision-making included our family, First Steps, with our permission, and Early Childhood Special Education staff.
- Eligibility for special education was decided.
- If the child was eligible, the IEP was written and agreement reached. See your “Notice of Parent Rights” for steps to take if there is disagreement.
- Consent for placement signed by parents.

Putting the IEP into Action

- Our child made the transition from First Steps to Early Childhood Special Education services or to another pre-kindergarten arrangement.
- The IEP was in place by our child’s 3rd birthday (unless the child has a summer birthday, see ESY page 7).
- We worked together to resolve any issues that arose.
- All are continuing to communicate during this time of change.

Names and telephone numbers of people involved in transition conference:

First Steps Service Coordinator: (Name) _____ (Number) _____
 Early Childhood Special Education: (Name) _____ (Number) _____
 Other: (Name) _____ (Number) _____
 Other: (Name) _____ (Number) _____

Public School Evaluation Team:

Name:	Specialty Area:	Phone:
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

My Questions and Concerns:

Transition Checklist

- 1. My child will soon be 3 years old, and my transition planning meeting is scheduled or has already been held.
- 2. My child has been referred to the local school district.
- 3. I have received a copy of the procedural safeguards. I know that if I do not understand them or have questions, I can contact my service coordinator, the local school district or MPACT, the parent training/information center.
- 4. The following records and information have been given or sent to the local school district:
 - Birth certificate
 - Shot (immunization) record
 - Social Security number
 - Medicaid number (if applicable)
 - Emergency contacts (family members, doctors, special instructions in case of an emergency, etc.)
 - Missouri First Steps records
 - Other preschool program records
 - Regional center records (if applicable)
 - Bureau of Special Health Care Needs records (if applicable)
 - Hospital, clinic or medical records (if applicable).
- 5. All needed screenings and evaluations have been completed.
- 6. Eligibility for special education services has been determined.
- 7. If my child is not eligible for special education services from the school district, other options have been discussed with my service coordinator.
- 8. I have visited my local school district's ECSE program (if available in my district) or have visited other area programs.
- 9. The IEP conference has been held, and the IEP has been developed. Goals and related services (if necessary) have been determined.
- 10. Placement for my child has been determined.
- 11. If needed, transportation has been arranged.
- 12. I have met and talked with my child's new teacher; he or she knows that my child has an IEP and is familiar with what the plan contains.

kindergarten transition

Following are excerpts from "Enhancing the Transition to Kindergarten: Connecting Families and Schools" by Marcia Kraft-Sayre and Robert Pianta, both at the University of Virginia. The article is in press for Dimensions of Early Childhood.

Approach emphasizes family-school connections, collaboration

The Kindergarten Transition Project at NCELD has developed a school-based approach designed to enhance connections among children, families, teachers and peers during the transition to kindergarten. These connections can be important supports to children and families during this period of change and reflect recent attempts to describe what ready schools can do to ease transitions (National Education Goals Panel, 1997).

Activities are intended to increase familiarity with school, provide for consistent expectations between home and school, and make children and families more comfortable interacting with school.

In addition, these relationships enable kindergarten teachers to more easily, and earlier, use the resources of families to support children's competence in school.

How we developed program

We collaborated with preschools, elementary schools, a summer pre-kindergarten program, and parents to learn about current transition practices, and then cooperatively designed a set of activities to foster positive transition experiences. These activities affected family-school connections, child-school connections, peer connections and connections between programs.

Regular meetings were held with teachers, family support workers, and principals to discuss factors that enhanced or hindered these kindergarten transition activities. In addition, families were asked about their experiences with their children's transition to kindergarten.

Recommended activities

A package of activities affecting many connections--child-teacher, family-teacher, child-peer, and others-- is more likely to support a successful transition, than any one activity alone. For example, children in one school system are enrolled in preschool with peers with whom they will go to elementary school.

(Continued on reverse)

Family/School Connections

- Arrange a time for parents to meet with the preschool and kindergarten teachers to discuss the expectations of kindergarten and their children's specific needs.
- Organize an informal dinner with parents and kindergarten teachers in conjunction with school open houses or back to school nights.
- Place children with kindergarten teachers who taught their older siblings to build upon pre-existing family-teacher bonds.
- Encourage families to engage their children in literacy activities at home, such as reading together.

Child/School Connections

- Provide opportunities for children to interact directly with their anticipated kindergarten teachers by arranging visits to kindergarten classrooms during story time, center time, recess, or a special school function.
- Familiarize children with their kindergarten teachers by reviewing their names, showing their pictures, and discussing what the kindergarten classroom will be like.
- Orient preschool children to the expectations of kindergarten, discuss the rules for learning and behaving, such as walking in a kindergarten line.

For more information, contact Loyd Little at 919-966-0867 or email <loyd_little@unc.edu>. Visit our web site at <WWW.NCEDL.ORG>

(Recommended activities—continued from front)

By arranging with elementary school principals and teachers for these children to be in the same kindergarten classroom together, peer relationships developed in preschool can be carried over into kindergarten.

Several preschools promote family-school connections by providing family support services. A family support worker, who is assigned to the preschool and elementary school, meets regularly with families in their homes, connects them to community resources when needed, provides opportunities for involvement in groups to discuss shared interests and address transition issues, and works to engage families in positive relationships with school.

Meetings between parents and kindergarten teachers before the onset of kindergarten, are arranged by the teacher and family support worker to help establish parent-teacher communication.

An additional connection involves linking pre-kindergarten children with their anticipated elementary school through opportunities for rising kindergarten children to visit their classroom in the spring before their kindergarten year.

Familiarizing children with their kindergarten teacher and specific classroom activities *prior* to school entry, in conjunction with a number of other transition activities, reduces uncertainty for the child.

Finally, perhaps the most important activity to enhance kindergarten transitions has been our collaborative group meetings where key players in the transition process—the teachers, principals, and family workers—all work together.

These meetings allow discussion of problems and solutions and build connections among program staff. For example, preschool and kindergarten staff, with the mutually shared goal of having preschool peers together in kindergarten, are working together to achieve this goal when kindergarten placement decisions are made.

Collaboration is fundamental

Collaboration with everyone involved is fundamental to both the development and implementation of the kindergarten transition program.

If you want to know more:

Pianta, R. C., & Walsh, D. J. (1996). High-risk Children in Schools: Creating Sustaining Relationships. New York: Routledge, Kegan-Paul.

Rimm-Kaufman, S.E. & Pianta, R.C. (1999). An ecological perspective on the transition to kindergarten. Manuscript submitted for publication.

U.S. Department of Health and Human Services, Administration for Children, Youth and Families, Head Start Bureau. (1996). Effective Transition Practices: Facilitating Continuity: Training Guide for the Head Start Learning Community. Aspen Systems Corporation.

NCEDL web site: <ncedl.org>

Peer Connections

- Arrange for children to interact with future kindergarten classmates at preschool or outside the classroom setting.
- Identify a current kindergartner to serve as “buddy” to a preschooler. Plan visits to the kindergarten classroom when the kindergartner “buddy” reads a story, demonstrates how to play a game, or shows the younger child how to use the classroom computer.

Program Connections

- Arrange discussions between preschool and kindergarten personnel about classroom practices and specific needs of individual children.



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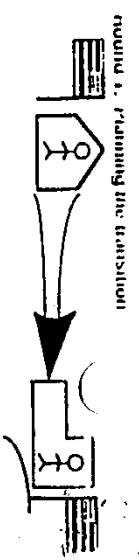


Table 1. Sample elementary to middle school transition process.

**ELEMENTARY TO MIDDLE SCHOOL
TRANSITION PROCESS FOR STUDENTS WITH SPECIAL NEEDS
(CMS)**

WHAT	WHO	BY WHEN
Step 1: Initial Information from sending school <ul style="list-style-type: none"> ● By March 1, sending school staff (regular and special education) fill out "Student General Information Sheets" and copy "Student Log Notes." ● Sending and receiving teachers share information regarding student general information. ● I-Team member does follow-up if the forms are not received by March 1. 		
Step 2: CMS Class Placement <ul style="list-style-type: none"> ● At the grade level meeting, new students are assigned to classroom teachers, homerooms, and advisors through input from the observation team, grade level teachers, and support staff. Considerations for placement include individual needs for support and combinations of students within each classroom and hub (5th and 6th grade). ● The CMS Principal is contacted about new student assignments for consideration during computer scheduling for all students. ● Parent letter is sent home to inform parents of class assignments and to let them know that a transition planning meeting will follow at a later date. A short parent questionnaire will be sent with the letter. 		
Step 3: Receiving teachers make contacts with sending teachers <ul style="list-style-type: none"> ● Teachers call the sending school to set up visit. ● Teachers visit sending school to observe student(s). 		

WHAT	WHO	BY WHEN
<p>Step 4: Students visit future classrooms/school</p> <ul style="list-style-type: none"> Individual students are assigned a CMS buddy (a member of his/her advisory group) for visits. Social days in advisory and lunch would be possible visit times. Lunch monitor staff take on a welcoming role. 		
<p>Step 5: Student-centered team meetings for transition</p> <ul style="list-style-type: none"> Individual student teams meet by May 15 (some combination of CMS classroom teacher, special educator, parent, advisor, special teachers, and sending teacher and instructional assistant when applies). At the meeting the team: <ul style="list-style-type: none"> reviews transition materials ("Student General Information Sheet," observation forms, etc.); develops an initial plan for transition (needs assessment, "Classroom Transition Plan" [optional], rough schedule, curriculum, etc.); decides on whether an IEP meeting or a Periodic Review would be the most appropriate for Fall. 		
<p>Step 6: Grade level team meetings for further planning in Spring</p>		
<p>Step 7: Setting dates for IEPs and Periodic Reviews</p> <ul style="list-style-type: none"> Case managers make contacts and set dates (before November 15) for IEPs or Periodic Reviews for individual students by September 30. 		

Form developed by the Cambridge Middle School Inclusion Team in Minnesota, May 1992



Table 2. Sample student support team activity for planning transitions.

ACTIVITY:	Focus: <i>Planning the Transition</i>	
MATERIALS:	chart paper, markers, a copy of the general daily schedule for the next year, chairs in a semi-circle	
OBJECTIVE:	To plan for the transition and to identify additional supports that might be needed for specific students.	
SET-UP:	Students seated in semi-circle for easy viewing of one another and of the facilitator. The student(s) with unique needs are part of the group. The facilitator is positioned in front of the students with chart paper poster to record student responses. Co-facilitator with a member of the sending team and the receiving team is best.	
DISCUSSION:	<p>1) <i>All of you will be going to the middle school next year. What do you know... what have you heard about being a 5th grader at Wiley Middle School?</i></p> <ul style="list-style-type: none"> ● <i>How is it different from 4th grade here at Beegen Elementary School? How is it the same?</i> ● <i>What does it look like? What does it feel like?</i> ● <i>What do you think you'll be expected to do there?</i> ● <i>What are some things that you might look forward to participating in, e.g., clubs, activities?</i> ● <i>Would a visit be helpful? What would you want to see? Who would you like to talk to?</i> <p>2) <i>How would you describe (student's name)?</i></p> <ul style="list-style-type: none"> ● <i>What are his/her strengths, gifts, and abilities?</i> ● <i>What are his/her challenge areas?</i> <p>3) <i>You have come up with a lot of good ideas. What do you think are the most important things to do to get ready to go to the Wiley Middle School?</i></p>	
ACTION PLAN:		
	ACTIVITY	WHO
		WHEN
	<p>1. Students visit the middle school</p> <ul style="list-style-type: none"> ● go through a typical day <p>2. Connect with middle school students</p> <ul style="list-style-type: none"> ● assign 'big brother/sisters' for the Fall ● spend the day with 'big brother/sister' <p>3. Meet the teachers for next year</p> <p>4. Practice lock combinations</p>	



Table 3. Sample form to document student-specific information for transitions.

GETTING TO KNOW YOU...GENERAL STUDENT INFORMATION

In order to facilitate the best transition for an individual student to a new school/grade current team members (at minimum, the classroom teacher and special educator), should fill out this form.

Student: _____	Date: _____
Current Special Educator: _____	General Educator: _____
Future Special Educator: _____	General Educator: _____

1. What do you *enjoy* about the student?

2. What are some of the student's *gifts, can-do behaviors, areas of progress, motivators, and interests*?

3. What specific *teaching strategies and learning style* needs stand out for this student?

4. What are the student's top *goal areas, needs, and challenges*? (If relevant, comment on behavioral strategies, especially consider transitions between activities and environments that have proven useful.)

5. What strategies have not worked in the past?

6. Who are some of the student's friends? Will they be able to make the transition together? Will at least two of them be in the same homeroom?

7. Briefly describe some of the ways the student participates in the regular classroom.

8. Please list relevant PHYSICAL or HEALTH information (medications, vision, hearing, motor abilities, chronic health problems, etc.).



Table 4. Sample format for developing an initial individualized schedule.

DAILY SCHEDULE INCLUSION WORKSHEET				
Student: _____		School: _____		
Sending Team: _____				
Receiving Team: _____				
Time	Environment/Activities	Structure	Student Activities	Student Support (adults, classmates, materials)
	ARRIVAL			
	AM CLASSES			
	LUNCH			
	PM CLASSES			
	SPECIALS			

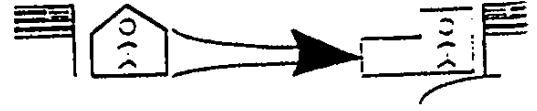


Table 5. Sample transition action plan.

ACTIVITY	WHO	WHEN	FOLLOW-UP
Regarding open house at the middle school:			
1. Invite all 4th graders and their parents.	homeroom teacher	4/10	none
2. Check wheelchair accessibility at the middle school.	Mrs. P	4/5	report back
3. During social studies ask students: <ul style="list-style-type: none"> • What sounds exciting about middle school? • What are your biggest fears about middle school? 	S.S teachers	4/15	discuss @ team meeting
4. Respond to #2, identify any students with unusually strong fears.	4th grade team	4/20	discuss @ team meeting
5. Develop a plan of support that includes the student and a friend taking a trip to the middle school and talking with middle school students and teachers.	4th grade team	4/25	discuss @ team meeting
6. Identify if additional follow-up is necessary to #5.			

TRANSITION CHECKLIST

Student's Name: _____

Current School Year: _____

**JANUARY:
Meeting**

- Initial Transition Team Meeting Agenda
- Establish core/extended teams (sending)
- Parents informed about transition timelines/process
- Educational options identified
- Identify current available resources
- Accessibility concerns
- Other items:

Person(s) Responsible

Date Completed

**FEBRUARY:
Actions**

- Identification of students strengths/needs
- Information gathering about next environments (e.g., classroom arrangement, teaching methods, materials available, schedule)
- Complete Parent Inventory and Transition Skills Assessment
- Discuss 1/2 day/full day options with parents for next year
- Other items:

**MARCH:
Actions**

- Identify next year's school
- Identify receiving team members (core/extended)
- Parent(s) meet next year's teacher(s)
- Opportunities for potential receiving staff to observe current setting (e.g., teachers, administrators, support staff)
- Begin updating assessment

Meeting	Person(s) Responsible	Date Completed
<ul style="list-style-type: none"> • Sending and receiving teams meet to share information/ plan for upcoming transition IEP 	_____	_____
<ul style="list-style-type: none"> • Collect video footage across the day 	_____	_____
<ul style="list-style-type: none"> • MAPS process/ suggest IEP goals 	_____	_____
<ul style="list-style-type: none"> • Other items: 	_____	_____
_____	_____	_____
_____	_____	_____
APRIL:		
Meeting		
<ul style="list-style-type: none"> • Sending and receiving teams meet for IEP: 	_____	_____
<ul style="list-style-type: none"> <ul style="list-style-type: none"> • Hold staffing to determine eligibility for services 	_____	_____
<ul style="list-style-type: none"> <ul style="list-style-type: none"> • Develop IEP 	_____	_____
<ul style="list-style-type: none"> <ul style="list-style-type: none"> • Summer program options 	_____	_____
<ul style="list-style-type: none"> <ul style="list-style-type: none"> • Resources/ materials/ adaptations 	_____	_____
<ul style="list-style-type: none"> <ul style="list-style-type: none"> • Collect video footage across the day 	_____	_____
Actions		
<ul style="list-style-type: none"> • Parent(s) observe next year's school 	_____	_____
<ul style="list-style-type: none"> • Draft visitation schedule for student to visit new classroom/ building 	_____	_____
<ul style="list-style-type: none"> • Identify inservice needs (e.g., receiving staff, peer orientation, other building staff) 	_____	_____
<ul style="list-style-type: none"> • Other items: 	_____	_____
_____	_____	_____
_____	_____	_____
MAY:		
Meeting		
<ul style="list-style-type: none"> • Sending and receiving teams meet to share information/ plan for upcoming school year: 	_____	_____
<ul style="list-style-type: none"> <ul style="list-style-type: none"> • Identify resources/ support services 	_____	_____
<ul style="list-style-type: none"> <ul style="list-style-type: none"> • Draft tentative student schedule 	_____	_____
<ul style="list-style-type: none"> <ul style="list-style-type: none"> • Matrix 	_____	_____
<ul style="list-style-type: none"> • Determine how classroom teacher, special education teacher, and facilitator (if needed) will work together 	_____	_____
<ul style="list-style-type: none"> • Transportation 	_____	_____
<ul style="list-style-type: none"> • Other items: 	_____	_____
_____	_____	_____
_____	_____	_____

Transition Checklist, Page 2

AUGUST: Meeting	Person(s) Responsible	Date Completed
•Sending and receiving teams meet to share information/ plan for school year:	_____	_____
•Review and update student's schedule	_____	_____
•Establish home-school communication system	_____	_____
•Determine frequency and dates of meetings	_____	_____
•Develop peer buddy, peer tutor program	_____	_____
•Other items:	_____	_____
_____	_____	_____
_____	_____	_____