

CADRE Webinar
Constructive Individual and Systemic Approaches to Helping Frequent Filers
Suzanne McDougall & Marshall Peter
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Transcript

>> Hello, everybody. This is Phil Moses, director of CADRE. Welcome to today's rescheduled webinar, "Constructive Individual and Systemic Approaches to Helping Frequent Filers." We apologize for any scheduling difficulties that we created, and indeed we are delighted you can join us today.

This webinar continues a series that began in 2010, and is being presented by Suzanne McDougall & Marshall Peter. We've muted your phone lines to minimize interruptions. You can enter any questions or comments into the Questions box, which you'll find on the right hand side of your screen; so not the Chat box, but use the Questions box. You'll find that on the right hand side of your Control Panel. The PowerPoint for this webinar, along with a few other handouts, are available in the Handouts box, which is also on the right side of your screen in the Control Panel. The PowerPoint is also available on the CADRE website. We will have ample time for questions at the end of their presentation.

Now we are fortunate to have two wonderful presenters today, both whose contributions to the field of Special Education and Dispute Resolution are beyond measure. As a Pennsylvania's Office of Dispute Resolution program manager, Suzanne McDougall currently supervises statewide special education dispute resolution resources and services. She has served over ten thousand families and advocates of children with disabilities through her work with the Special Education Consult Line, an information helpline for families and advocates of children with disabilities. Suzanne is the lead presenter of Creating Agreement in Special Education, a conflict education training for stakeholders of the special education process. She is a graduate of Penn State University, and obtained a master's in Conflict Analysis and Engagement from Antioch University.

Marshall Peter recently retired from being the executive director of Direction Service, and the founding director of CADRE. After receiving a master's in Special Education from the University of Oregon, he substitute taught in classes for students who had emotional behavioral disorders. Marshall began working in 1976 at Direction Service, a multi-program family support agency. He did this as a parent advocate where he provided ongoing support and advocacy services to more than five hundred families who have children with disabilities. His early work as an aggressive advocate evolved into an interest in developing methods for facilitating home-school partnerships that are respectful, considerate, and yield equally powerful results for children and families. Marshall directed a successful U.S. Department of Education funded project that field tested a conciliation model aimed at addressing the cultural barriers that interfere with the effective utilization of special education services.

It is our very good fortune to have Suzanne and Marshall with us today. And I'll now turn it over to Marshall.

>> Thank you so much, Phil. It's a real treat to be here back in the old neighborhood. I really want to appreciate you, Kelly Rauscher, who helped me at one point with this presentation; Noella Bernal, who was incredibly helpful putting this together. It's been a real treat working with Suzanne McDougall. A lot of people really helped with this. I also want to say that this work hangs very much on the work of

George Sugai and Rob Warner. I had a chance to actually talk with George probably three or four times for an hour, hour and a half early in the morning, just sort of sharing what it was that I was thinking about, and then having the incredible opportunity to have his thoughts, which are very much reflected here. If it's good, then it's probably George and Rob's work. If there's problems in the application, or the way that it's being thought about, then that's on me.

What I'm going to do, I have 27 minutes to do an absolute world-wind introduction of what I think are some potentially helpful ideas; they're ideas that I began to think more about shortly before I retired, and I wanted to just kind of leave them with people who might find them interesting, or a value. However, it's not at all my hope or intention that in today's presentation I'm going to in any way prepare you to act on this stuff, merely to introduce you to it. This is not a legal presentation. I wanted to put up a slide that said, in a very basic sort of a way, what written state complaints were and due process complaints, so that if you're interested, you could refer to it. But I don't in any way intend to get into it.

Really what the purpose is today is to consider how a multi-tiered support system approach might be applied to understanding conflict resolution, and especially what I'm referring to as problem complaining. And even as I say that I want to, I know that some people really bristled at the use of the term "frequent filer," some people read it as "frequent flier" -- you know, I think that it will be helpful, at least for some people, some may also find problem complaining offensive -- certainly not my intention, or Suzanne's intention, to offend. And I just want to notice that I think that frequent filing may not be exactly what was intended here. So in fact, most complaints are legitimate, they're appropriate, and that when they are received, they should, in fact, be carefully considered and appropriate action taken to address them. When we think about problem complaining, what we're really thinking about is complaining that can be defined by aggressive tone, vulgar language, insistent calling after calling after calling, you know, hour and a half telephone conversations -- behavior that, quite frankly, is behavior that I engaged in myself when I was terribly upset about what was happening with my daughter's program. So it's not unfamiliar territory for me personally, or organizationally. The obvious solution when somebody is complaining incessantly is to give them what they're being asked for. There is a risk, though, if what's being asked for is unreasonable, that you will reinforce problem behavior. So when it's really critical, and what Suzanne is exquisite at, is unpacking the underlying interests that undergird complaining.

So there are really three important goals that I believe might be advanced by thinking about it, and perhaps taking some aspects of what we're talking about. One is improved teaching and learning, and that's, after all, what it's really all about. We want students to have optimal learning experiences. I also believe that this will lead to increased parent satisfaction that to the extent that we build capable systems and we look at really what are unmet needs that may be fueling challenging interactions, that that attention will lead to parents being more happy. And what I believe can be an outcome is, reduce what I would describe as being burden. And for me, burden is the amount of time that is spent preparing for really challenging interactions, the amount of time that spent engaged in challenging interactions, and the kind of psychic distress, the lying awake at night, the dreading the calls, the worrying about the family and the child, that if there's a way that we can camp that down, I think we can really elevate job satisfaction and performance, both of people who are interacting with families, and how families themselves feel.

So basic multi-tiered system of support logic -- I think this will be very, very familiar to most if not all of you, is this is the way that George and Rob and others think about changing schools. And so that there are some basic interventions and ways that you create environments in school that all students benefit

from. There are then, and 80 percent of students in school, maybe even more, if a school is really capably delivering universal interventions, then only a subset of kids will really need more intensive support. Perhaps 15 percent of kids, that some group might need some sort of group systems or group interventions, and then a very small percentage, perhaps five percent, require specialized interventions. They are students who are highly at risk.

So then thinking about, so how does that thinking relate to what it is that we do in dispute resolution? What this triangle does is, it offers a sense about what are the basic characteristic of optimally communicative environments? What are those things that we would hope to see in local education agencies and schools that we believe would really support most families to really feel welcomed and feel enabled to engage in the best possible work on behalf of their kids? We then as move up, we will see interventions that are perhaps for -- may relate to kids who have especially complex needs, or particularly challenging situations. And then moving up to the top, and interventions that may become especially useful when things are really challenging, and easy resolution isn't at hand. The information that's presented in these boxes is not in any way rank-ordered, in a perfect world all of them would be available, but I think that that bottom green area, we would be really well-served to spend time thinking about each of those, and trying to figure out how, to the maximum extent possible, we can make them available. I also want you to notice, this is very similar to the CADRE continuum. It's a slightly different configuration in terms of really displaying information based on intensity of need. But I believe that the two views are extraordinarily that they are compatible. So that is, then, a local tiered system of support. There's also, then, a state tiered system of support; it's much thinner. I think that the ability of state education agencies to really intervene at the individual child and family level is somewhat limited. That said, I think that capable state education agencies would include at a minimum -- although easily said, not so easily done -- a capable website, rapid 1-800 access to a competent, knowledgeable person, and easily-understood resources on problem resolution options. So I'd like to think about that as being sort of a floor, and that that being available will essentially respond to many of the sorts of concerns that -- most of the concerns -- that a state education agency might feel.

So most disputes are legitimate, and all need to be considered. Disputes are influenced or motivated oftentimes by history's prior failures, non-satisfying solutions, unacceptable outcomes, being treated with disrespect, being ignored, and that as we begin to develop these histories of problems and of challenges and interactions, that then, as we end up actually in a situation where something has gone away, that history and then the context, whatever is happening in the immediate moment, and our past experience with motivation has and what we've gotten based on behaving a certain way has essentially prepared us to engage in sometimes repetitive, challenging behavior. So in order to try to attempt to change what I'm generally describing as problem complaining, we really need to think about history context in motivation.

There's a book that I would commend to your attention; George shared with me the "Power of Habit: Why We Do What We Do in Life and Business" by Charles Duhigg, and he presents, I think, a very interesting, enjoyable to read way of looking at behavior. He talks about cues, that is a -- and this then moves things more into what's immediately manageable -- what's the trigger that we've learned that cues and leads to the behavior. And then habit, and what's that learned behavior that is triggered and maintained by outcome, and then outcome, or reward, is the consequence or result that is associated with and maintains behavior.

So as an example, we might see dessert. And I wonder -- I'm thinking that there's animation -- so maybe we lost the animation. Okay, so we'll go back, then. So originally what it said was "dessert," and then,

"eat dessert," and "satisfied?" And what we're suggesting is that ideally, we would over time encourage an new habit, which would be that you see dessert, and instead of eating it, you eat the carrot and end up feeling satisfied. Similarly, TV remote, the habit would be to just plunk on down and watch television all night, and that we would try to learn a new habit, which would be taking a walk. Child suspended, the old habit might be to go ballistic, show up at the school, tantrum and scream, and instead that we would try to teach a new habit, which is the case manager being contacted and the child being reinstated. IEP is not implemented -- new habit is emergency team meeting, old habit might have been to go in and essentially present at the superintendent's office, demand attention at a school board meeting -- instead, convening an emergency team and implementing the program. I want to say that as we think about this, really that it's important to focus on the cue. And so when I was trying to lose weight, you know, all the chocolate and nuts in my home were hidden so I didn't see them. And I kind of systematically moved through the office and told people that I didn't think it was necessarily helpful for them to have candy on their desks. You know, if you hide the TV remote, you know, and you don't see it, then you may not all of a sudden turn on the television. If you figure out more constructive ways to deal with behavior problems than to suspend kids, then you may be able to quickly figure out an alternative approach. Obviously we want IEPs to be implemented, and so if the cue is a non-implemented IEP, then we might expect that's sort of a problem.

So developing an effective, efficient and relevant strategy for problem behavior requires consideration of three elements and six practices. So the element of cue -- you want to try to remove the completing cue. And so I would say that a cue might be a surprise report card, or an ambush report card where the parent walks in and it's the first that they know that their kid is failing everything, that their behavior is creating substantial problems at school. And instead, we would replace that cue with providing regular and timely updates about what's going on, that instead of this kind of explosive disruption, that we might encourage some sort of a regular call-in or check-in with the school. And optimally, to begin to figure out a log or a message book that would be passed back and forth between the school that would really allow for asynchronous communication, rather than sort of on-demand communication. And that taking away this sort of crisis meeting based on extreme tantruming, and instead really at the point that appropriate communication is occurring to really maximize responsiveness, and maybe to even sweeten the deal a little bit and kind of go, you know, I noticed in the log book that you're having some really serious behavior problems at home. I'd love to sit down, think with you about those and see if there are ways that in addition to the school focus, we might be able to really help you to feel more success at home.

So I'm going to now move into some really kind of more complex delivery of those concepts. Again, just trying to expose you to some ideas; I'm not in any way imagining that this is going to prepare you to take action. So the following charts are very generic. What I've tried to do is to list a range of possibilities and a range of explanations and strategies that might be useful. As I think about this, I really -- it's important to understand that staff behavior can significantly contribute to parental complaints and trigger increased negative emotions and responses. You may, in fact, be the problem. And if you aren't the problem, you may be very aware of a problem in your school or your system that, by their very behavior, invokes negative response. And so trying to figure out how to deal with that, I think that there's -- actually, this very sort of a functional behavioral assessment could be applied to a problem employee conduct, and maybe with some potential positive outcome. But I just know that in my case with my daughter, there was a staff person, and I became very, very explicit that if that person kept coming to meetings, that I thought that the possibility of any sort of a resolution was extraordinarily remote.

I also want you to understand that some of the possible consequence strategies, especially those related to extinction, may increase the problem behavior. They may also cause you to be viewed as a personnel problem. I wrestle with whether to even notice extinguishing type responses, and I kept them in, just because I think if somebody's screaming at you and threatening you, and telling you they're going to burn your car down and using foul language, that it is really appropriate to disengage, to hang up, or to essentially create a space.

So as we look at this, I think that the task is to develop a working hypothesis. And this is hard to look at, you should be able to access an easier to view chart in the attachments. But what I've done here is, I have provided a range of options. And so if you take a look, and I'm going to kind of work my way across, there are setting events. And so setting events are things that sort of immediately precede the problem, and they could be everything from history of non-response and disrespect to families being under extreme financial medical stress, programs haven't been implemented, perhaps lack of medication, lack of social support. And as you think about those setting events, there may be strategies that could be employed that would help to address those. There are also, then, perhaps right before the incident, there are then triggers, or antecedents. The family is ignored, disrespected, child's thrown out, child is bullied, harassed, previous plan not implemented -- it kind of pushes things into that moment of problem behavior; yelling, vulgar, abusive, threatening behavior, serial complaints, letter write -- you know, a lot of anger, challenging behavior. And under each of those, you will see a set of strategies that might be deployed to help address them, and hopefully then would move problem behavior into more of a desired behavior, and that with the desired behavior that there would be an improved consequence. Those people made the shift from problematic approaches to challenges that they would, in fact, begin to experience more of what it is that they want, and what their child needs. As you look at this, some of you are extraordinarily familiar with this approach, and how it's applied. For those of you who aren't, if you're in a PBIS school, or you have access to people who are behavior specialists, this will be extraordinarily familiar. And essentially, what we're doing is, we are applying very, very well-used, sophisticated, evidence-based technology, and just applying it to a slightly different problem than typical.

And I'm going to give you just a quick example: When I was an advocate, I had a -- and I guess I'm still an advocate, but when that was my sort of job title, Clarisse was referred to me. Clarisse was a mom who had gone absolutely ballistic at school over and over again, demanding meetings, abusive, screaming and yelling at people, showing up at school unannounced and creating massive disruption. And however, when she did that, she was listened to, she had a sense of power. People treated her with some amount of respect. So she was referred to me to see if I could in some way be helpful to her. I spent some time with her. She was very poor, extremely financially challenged. She had limited capacity to really understand -- was sort of being buffeted by all sorts of aspects of her life that were outside of her control. She had two kids that were very challenging, a single mom. She had a history of bad taste in men and some very, very abusive relationships. Her life was out of control. And so we began to work together. I got her an SSI application, and immediately for one of the kids I helped get her connected to parenting supports. And we began to spend some time really planning for a coming meeting, thinking about what was most important to her, and rehearsing how it was that she would present it. And so we then had the meeting, and it was really incredible. She was very appropriate, and there was almost -- across the room you could almost see jaws drop, because it was such a transformation. She -- all of her concerns were addressed. People were thrilled to have the opportunity to communicate in this way with her. And so we went out into the parking lot, and you know, I said, "Wow, Clarisse, that was absolutely incredible." And she kind of sheepishly looked at me and said, "Thank you, Marshall." And it was just one of those moments where -- I don't want to misrepresent this,

it was not easy. She continued to need my support, and I was involved with her for at least a decade, and kind of cycled in and out of challenges. But it was really -- there were so many aspects of her life that really, you couldn't tell based on what it was that was going on in the behavior that she was presenting, but as those things began to work out, she became then much more capable of positively participating and supporting program design and implementation for her kids.

I've also then presented, although again much thinner, how it is that this kind of behavior analysis, technology and support planning might produce value at the state level. One of the things that's kind of a theme for me when I look at what goes on in schools, and in my experiences, I'm stunned by how many cultural gender class slights occur; you know, sort of hearing people in meetings refer to adult women as "girls," or some kind of flagrantly disrespectful conduct that the person who's doing it is really oblivious to the kind of impact that it has. And so I really want to encourage, as you think about interactions with families and people that you're working with, how terribly important it is to be engaging in constant sort of educational engagement and elevating consciousness and awareness of both the -- of the unintended consequences of disruptive behavior.

Phew -- so as I said, I'm steaming through this stuff, but I believe that I'm going to get it done in my 27 minutes. And hopefully, you won't all totally despise me, thought I just feel like I got bludgeoned by a blunt instrument.

So there are four critical pillars that I would leave you with that I think as you consider working with challenging behavior in families that I think are very important, one is to be sure that you're being legally compliant. I danced right through that at the beginning, but obviously it's terribly important to follow the law and to do what the law required, and whenever possible to do more than what's required by the law.

The next thing is, don't do anything that doesn't feel right to you. I mean, whatever you do, please don't take something out of this presentation and do it because I suggested that it might be helpful, but it doesn't feel right to you. I mean, you have to really kind of trust your gut as you're formulating a hypothesis. You really -- your gut may really guide you to a strategy that can be helpful. And in my experience, families know what they need, and that if you say, "So what do you need? How can I be helpful," that often times as you begin to delve into that information -- and Suzanne's going to talk about that -- you really can stumble onto possibilities that hadn't occurred to you that can be very helpful. Reinforce desired behavior. Catch people doing the right thing; if a family surprises you at some thing that they did that's really helping their kid that's considerate of you, you know, take a minute, notice it, send a note home, kind of going, "Wow, I really appreciated that you did this," or did that. Nobody gives personal notes anymore. And just a simple note, "Billy's really lucky that you're his mom," or, "I loved the way that you arrived early and were well-prepared." You know, "Thank you so much for letting me call you back." Any sort of a way that you can notice and appreciate behavior that is moving in a direction that feels more appropriate and useful. And then finally, be kind. I mean, that's at the core of all of this. It may feel tactical, but I really believe that the application of these principles can create happier families and better educational outcomes, and happier staff and educators.

So with that, phew, I'm going to take a deep breath, and I'm going to hand it off to my friend, Suzanne McDougall.

>> And thank you Marshall, and Suzanne, just before you get started, we do note there's a question in the question box around letter writing. And we'll make sure that our presenters speak to that at the end

of Suzanne's presentation. But we do note that, and if others have questions, again, please feel free to ask those questions through the Questions box on the right side of the dashboard. Suzanne, take it away.

>> All right, thanks very much. Marshall, thank you so much. I share so much of -- I believe what you've said is so relevant and true, especially the pillars. And sharing cyberspace with someone who I regard as a national treasure is such an honor. And I also appreciate Phil, Noella and team CADRE for your invitation to do this, and also for the support you've provided as I prepare for my portion of the training.

So the soft skill section is kind of a boots on the ground perspective on communication with someone who's very displeased, maybe even chronically so, and could be in a process of using all of the local and state-level remedies available in order to be heard and to have their concerns addressed. As Marshall said, most complaints are legitimate, and what I'm going to offer is, again, the perspective, and we recognize that due process, and state complaints are incredibly important tools. What I'm talking about today is based on what -- you know, we understand about conflict and complaints, as well as some strategies that I've practiced, whether intentionally or just by discovery, that proved useful when I've engaged with a chronically dissatisfied, you know, a very frustrated individual. To clarify the method of engagement, for me it's via telephone call, so if I happen to use the term "caller," please know that I'm referring to an individual who's requested a call back from our office. And to use Marshall's description, the tone and frequency of their call suggest that it's problematic.

So this is a vast audience with experience participating in this webinar, and so I just invite you to post your ideas and best practice as we go. And thanks for that.

Next slide, please. So most of the experience I have in this topic has been gained as a specialist who's going to call us through the ConsultLine. The ConsultLine was established in 1995 by the PA Department of Education, as a toll-free statewide service for parents and advocates who need information or want assistance with the state complaint process, a dispute resolution option or a special education regulation, procedural safeguard, et cetera. Going back to the framework that Marshall offered, when you think the multi-tiered systems of support, the ConsultLine would fall into the category of a state first-level responder.

Next slide -- so ConsultLine specialists manage a high volume of calls. Maybe not billions as I have here, but there are three full-time staff who assist over three thousand callers a year. So over the course of a career, a specialist could easily have assisted well over ten thousand families and advocates of children who have disabilities. So that's a lot of listening and a lot of attempting to understand and respond capably. Some of these callers are memorable, as are some of the calls. Parents learn from the consult line through the procedural safeguards notice, so the information is widely distributed throughout the state. And when they call, their concerns are usually well-formed, and perhaps have been building over time. They may be frustrated with what's going on at the local level and have reached a point where they want someone from the state to hear them out, and maybe even provide a solution. The trust and relationship they have with the school may have already become quite compromised, and most callers are very appreciative, respectful and happy to be able to talk with somebody. So I want to put that out there, most of the calls are not problematic, and callers are not -- don't fit that category. But some do. Most callers aren't looking actually to file a complaint, but they do need to understand the options that are available to them.

So that's what ConsultLine's about. So now I'm going to focus a little more on the general concept of complaints. Next slide, please. So a way to think about a complaint is to focus on the need or interests that the person or the complainant is trying to satisfy. So an instrumental complaint can be thought of as a means for distributive justice; something like a written state complaint or a due process complaint would fit into this category. An expressive complaint attempts to address another need. It's more about being heard, such as expressing a need, concern or fear, and when attempting to be a competent responder, I think it's helpful to consider the person who frequently accesses the system in formal ways, such as filing a state complaint, might not be looking for a particular decision or outcome, but rather may need to feel validated or heard to have their concerns respected. That may not happen to their satisfaction at the local level, and therefore, that next step might be to call the ConsultLine or to file a complaint. However, we know that those processes are also not necessarily completely satisfying, if what you really need is to kind of sooth the soul and speak with somebody who you know is genuinely trying to listen and understand and help. So I know that happens at the state level, through the Bureau of Special Ed, through the ConsultLine and many of the other parent support programs.

So and in that sense, a capable responder at the local or state level may actually be in a position to better address and express a complaint. It's what when we think about it as an expressive complaint, as opposed to the instrumental complaint, that we can kind of start to see how really talking it through with somebody can be very effective, and might even prevent the need for a more litigious process. The challenge statement shared by Marshall earlier described a conflict of having a history, a context and a motivation. We try to provide a competent response; I have to factor in their needs to lay the foundation for how and why they've come to this point. That's the history piece of it. It's relevant to them, even though it may not be as important to me, and I might be kind of anxious to get on with the matter at hand. But the actual telling of it provides some type of -- it provides some attention, if you will, to the actual issue. People often express that they don't really want to be in a position where they're filing a state complaint, that they've kind of run out of an idea or an option for how to resolve it. And they only just want attention on the issue. So I might be selfish a little bit on the motivation, but ultimately, I have to kind of reel back a little bit and meet the person where they are. And so try as I may, you know, we're not going to move far very fast in the conversation if I don't provide the time and attention to their perspective on how they got there.

I also have to expect that sometimes their telling me the story sometimes includes their emotional experience and their basic assumptions, and actually those basic assumptions are really helpful to know about. And we're going to talk about perceptions and how that kind of comes into play. So this all kind of leads to what's involved in an expressive complaint, from my perspective.

Next slide, please. So when I was preparing for this presentation for the symposium last fall, I took a hindsight view of some of the most difficult calls and individuals that I've worked with, and I thought about how to prepare to engage, if I were to do that all over again. And it starts with an awareness of the impressions I have already developed; again, that that's my perception of this caller, and how this call is likely to go. So often, it starts with a voicemail; maybe your state or local system's similar, you know, there's a voicemail that comes in, and quite often there might be a lot of emotion or frustration or anger expressed during that voicemail. So that can be kind of relevant to how I think about what we're about to do. I consider what my role is and what I hope to accomplish at the end of the call. And I know that they might not understand my role, or how -- what I'm going to actually be able to do for them. So without deflating their ideas about what I might be able to do for them, I need to kind of explain my role in sort of very transparent way. And I think that this can -- and generally speaking,

people appreciate understanding that, because it's going to kind of help them monitor in the end what I'm actually going to be able to provide.

So as it goes, even with three thousand calls a year, over the course of time, there's some familiarity and past experience with varied callers. So I've got to think about how that's going to influence me. As Marshall said, sometimes I could be the problem, and it might be wise for me to say to one of my colleagues, "You know, you had a really great experience with this caller last time, maybe you should take this call." So we try not to do that as much as possible, but sometimes we know it's a worthwhile thing to do.

Next slide, please. So I think it's good to keep in mind that the person I'm speaking with may not actually know what their motivation is, or what they want out of the interaction or the complaint. And it's important to keep in mind that when I'm listening, I'm basically understanding it from my perspective. I love this quote by Anais Nin, you know, "We don't see things as they are, we see things as we are." And that's going to influence me if I sort of consider that my viewpoint is different, and it's going to possibly influence my tone and expression. And so it's important to keep this piece in mind.

Next slide, please. So I think it's good to also think about the fact that the speaker might not always know, or the caller might not always know what their motivation is, and what they want out of the interaction. So this is basically a list of possibilities. I'm sure it's not exhaustive, but sometimes people will say, "I just want somebody to know about this," you know, there's documentation and notes that we keep on the consult line, but they're not shared with anybody. And yet, it provides some satisfaction, so somebody would know that there is something like that. And sometimes it's really about an apology. While I might not be in the position to offer that apology, I can, through the things I say, acknowledge their journey, and what's happened to this point. And sometimes it's really just a call because they're just so frustrated, they don't understand what their rights are, they're confused by it. And confusion can be very disorienting and kind of ratchet up people's response when they don't really know that's going on.

So next slide, please. So after I introduce myself, so now I'm kind of working through a call. I have to introduce myself. I try to frame my understanding of the nature of their concern, and that will probably be based on the message that they left. It helps both of us to have a starting point, because sometimes if we just launch in and there's no framework for it, it can be unproductive. So if I know a little bit about it, I might ask them, you know, what's happening right now that caused them to call, and if I don't know what's going on, I kind of ask them to start with where we are right now, because history matters, that's going to come into play. But I don't want to start in the past. So tone and inflection, the balance that's genuine and possible is really important here. So I don't want to minimize the story that they want to tell, I don't want to ignore the fact that there may have been a lot of things that went wrong that they feel the need to share, so I want to be careful with my tone to not suggest that it's not important, but maybe to acknowledge that it's important, however, for my work with them, it's going to be important for me to understand what's happening in the moment.

So next slide, please. So if someone starts with, "You're the first person to call me back," or, "I've been bounced around and nobody wants to help me," I do try to acknowledge that frustration, and yet without sort of buying too far into how bad it is out there. Sometimes I will say, you know, at the state level, there are services, and we all manage a kind high volume of calls, but gosh, I'm glad I was able to get in touch with you. And I say that in a way to try to be as sincere as possible, and people genuinely,

whether they're very frustrated or not, they're pretty happy to be actually speaking with somebody at the moment. So that's always a pretty good start.

So and then what I would then is, again, establish why I'm there, why I called, and to try to get from them the nature of what they need, and then what I think I can do to help them. So I might always start by saying, "Well, you've described something that's pretty complex. I'm going to try to work through this in a way that we sort of break it down a little bit at a time, because I think maybe there's some information that you might be missing," or, "I heard you say something that doesn't sound exactly consistent with my understanding of the regulations, something along those lines, and in a tone that genuinely is aimed at clarity.

Next slide, please. So during the conversations -- I love this thought, one of the trainings we do is creating agreement training, that CADRE launched with [INAUDIBLE] years ago, and we talked about curiosity, you know, and about adding a learning conversation -- that's critical, because if it's not just the facts, but it's how those facts have impacted the caller, because all of that kind of leads to, ultimately, what they're looking for as a remedy. You've got to make some room for emotions without letting them dominate a productive process. So I think it's always very important to give people a little space, a little opportunity to get it out. You know, people are sometimes kind of embarrassed and apologetic when they've gotten emotional, maybe they've been crying. So just as Marshall said, about being kind. That's kind of obvious, but I find it's really very, very helpful, people appreciate that.

So reframing is a skill well worth, well worth learning about and practicing. And there's a lot of good work out there on reframing. And I'm quite sure that CADRE has resources to help people kind of explore this a little bit more. It's just a way of summarizing a concern, and perhaps kind of redirecting it into a sort of solution-oriented approach. It might be something as simple as, "Gosh, you've expressed something that's been real difficult and I understand that you're frustrated, let's talk about what a good outcome is going to look like. What would ultimately feel right in this situation?" So reframing it is a way to sort of help them envision a little bit of success, because you can live in that dark, negative place because that's where you've been for a while, so sometimes just that envisioning, helping a person -- giving them a little time, ask them a question or two that will help set them in a little bit more positive direction. It can be very, very powerful.

Next slide, please. So other things would be, silence is a powerful thing. And it can be used as an equally effective tool, I think, when somebody has just berated you, or really unloaded in a way that may be inappropriate, and has been hurtful or assaultive in some way. And if you're still on the call at that point, you know, I think the silence can work magic. And what I often find is, with a little bit of space, people will say almost very quickly thereafter, "Wow, I'm sorry, I didn't mean to -- I know you're not the person who caused this." I just heard my husband say something exactly like that when he was trying to get a lower cable bill. This is something he does on maybe a monthly basis -- so I'm really familiar with that, that sort of tone, and how things can change. So also, we want to explore the assumptions, you know, check their understanding. Do they have correct information? That's key on ConsultLine. So often a parent calls because they believe that their child is -- that the school did something that was not compliant. And that might be the case sometimes, but sometimes it's not. And what their understanding of the law is matters quite a bit. So explore some of those assumptions. If your neighbor told you this is how it is, let's actually see if that's correct. Let's see what it says in the regulations.

So next slide, please. So this is where it's really helpful. On the ConsultLine, there's a kind of a pattern to a call on the way, you know, there's a listening part, and then there's also a telling part. So sometimes it's about information and resources that are going to be very applicable to what that person's concerns might be. Regulatory content, as I was just saying, can be a great neutralizer. A lot of times when somebody is angry, they believe something is wrong, something was done wrong, and perception's everything, of course. So when you can say okay, you know, what, I'm going to -- let's just take a look what this information says, and let's see how that might impact the situation. And I'm really surprised -- not surprised, but I'm pleased sometimes when somebody says, "Oh, okay, that's not what I was thinking," or, "Yeah, that's what I think happened." It helps a lot. It sort of crystalizes what remains.

Next slide, please. So recognizing the impact, what I mean by this is, this is from the perspective of an impact on me. So I am the person responding to the person's concerns. It may have been an emotional call. I may have gotten a little ramped up. I try not to, but you know, what, we're all human beings. And so I notice what things are triggers for me. So here are some of the things that -- and this is just very personal, very specific to me as an individual. But I want to be honest and say, you know, for me, tone of voice is going to have a big impact. Blaming statements -- well, I've learned how to neutralize my thinking about that. And I understand them as something different than a blame on me, I still know that I react to it a little teeny bit, and I want to respond sometimes. But I have to think about whether that's appropriate or not. Crude or overly-dramatic language -- I'll recognize it, it's not -- I think when I started in 1998, I might have [INAUDIBLE] more. But I'm kind of used to some of it, and it doesn't have the same kind of impact that it had at one time. That doesn't mean it won't impact you as a listener.

This other's expressed assumptions -- if I find that somebody's working off an assumption that maybe concerns me, or maybe I think it's inaccurate, I'm going to want to spend some time and face what matters here. It's important to clarify that piece of information, because that might not be what this is really about. They may have just said something that I don't particular think is accurate. Embedded requests -- I'm always listening for that, because a complaint sort of is a request in a different kind of way. So what is it that they're looking for. And then lastly, I put language of entitlement -- that doesn't bother me so much anymore. I think there was a time where maybe that might have made me wonder if, I don't know, I may have a different viewpoint or a different mindset. I may have been raised differently or have different values. So just little things like that might impact me.

Next? So here's something that I want to offer as just a way of -- so if you're in the conversation, and I've kind of talked about the mindset, the preparations, some of the ways I might approach the call or the caller. But then sometimes things just go south, you know? Sometimes it gets unproductive. And so you might need to hit the pause button, or refresh, but you don't want to undo all the kind of good time and work that you maybe already put into it. So sometimes, what I might say is something along the lines of what you see here, that there's a lot going on in this conversation, and I want to make sure I've got it right, got the right mindset for finishing it out and hearing you out. So I'm going to suggest that I call you back in maybe 20 minutes. Or if you prefer, you can call me. You know, here's the number where you can reach me, and let's get back together after we sort of take a pause. I think this can actually be very, very helpful.

So next slide. And again, this is another way of saying, "I've got to focus on what you're telling me, but I'm feeling a little overwhelmed by how I'm hearing it." I mean, that's just a really honest way to say, it's about tone of voice, it's impacting me, or it feels like you're blaming me, but it's saying it in a way that makes it a little bit more about what my responsibilities are.

Next slide. So in completing the conversation, I do really like to, especially with an emotional call, especially with somebody who was very angry and you've kind of gotten somewhere -- I like to recognize that success, you know? I like to summarize where we went, what we did, and what are we going to be doing next, or what they said they're going to be doing. And then I'm actually going to follow through on any commitments that I've made. Sometimes we offer intervention where we send an email to the school district regarding the parent's concerns. And that might be one of the things, or maybe I'm going to follow up by sending links to information via email, or a complaint packet, or whatever it might be. So recognizing success, summarizing actions and then following through is important.

Next slide. So and then the mindset that occur after a [INAUDIBLE]. If you're going to stay in this business for a long time, you have to sort of be able to, I don't know, process it. We have great staff here, we can sometimes kind of decompress with each other. It might mean just getting some fresh air. We all have our ways of sort of ramping back down. And then maybe acknowledging that I was a competent responder, you know, or that I wasn't, and sort of reflecting on what went wrong. And then just try to basically be kind, as Marshall said. It's a journey, and sometimes it's a battle.

Next slide, please. That's it. So thank you very much. And I'll let you take it from here.

>> So there was a question about letter writing and why it appeared as a problem behavior. And I'm glad that that was asked. So I believe that actually, letter writing is a very important and constructive behavior. A letter creates an important sort of a record of a concern. It invites you to be very clear about what the concern is, and maybe to suggest a course of response. And so I think really, when I put it in the list, I was thinking more about problem letter writing. And for me, problem letter writing, I imagine that many of you on the call, I've been one of, say, 70 people that have been carbon copied on emails, because it was because I was the director of CADRE, but everyone from the secretary of the Department of Education to maybe the president, to all the local media, to directors of -- so in an email or a letter that, in fact, is very -- it says things about people that are character assassination -- so I think that there is appropriate, useful, important letter writing, and then there is letter writing that I would describe as being problematic. So hopefully that helps.

There was also a question about sort of apply these approaches to both local-level concerns as well as education agency concerns and state concerns. And I think that again, these technologies, both multi-tiered systems of support and the functional behavioral assessment really are useful at any level.

There are other questions?

>> Yeah, there are -- can you see the questions, Marshall?

>> No, I can't.

>> There are other questions, do you specifically ask your callers their motivation? Or do you try to tease it out without asking specifically?

>> Yeah, at some point I might say it. If I'm a little bit confused, if I think things have kind of, again, kind of become entrenched and maybe not really productive, I might say something as basic and simple as, "So what would like from this call today? What would you like? What are you ultimately trying to achieve?" I wouldn't put out there, you know, any of the items on the list. But I might ask the question,

you know, I'd be curious about what it is that they hope to achieve, what it is that they mean. Sometimes they might say something as simple as, "I just want to make sure somebody knows about this." Or, "I want the LEA to be responsible." You know? So that's kind of how we would handle that.

>> Thank you. And we want to invite anybody to, if you have a question or a comment, to go ahead and type those in the Question box. There was a question about the materials, and they will be available on the website after the webinar. We also are recording the webinar and will have it available on the website once we have it captioned.

There is -- are there additional questions? Again, feel free to type those into the Chat box, or the Question box. Well, if there are no questions -- I don't know if we can have any people, can we have any people? I don't think we can. We do want to thank you for joining us today. There's a link on your screen that will take you to a very brief survey monkey to evaluate today's webinar, and we'd greatly appreciate if you'd take a few minutes to do this. Our next webinar is titled, "Nature Versus Nurture, Our Brains' Responses to Conflict." That'll occur September 14th at 11:30 Pacific time. This webinar will be conducted by Drs. Claire Fowler and Leslie Cook, and more information about the webinar will soon be available on the CADRE website, and we look forward to you joining us for that webinar.

And with that, I think that concludes today's webinar. And again, we appreciate everybody joining us today. We hope you have a terrific day. Thank you very much.

>> Thank you, Phil.

>> Thanks everybody at CADRE. In the words of the immortal Muddy Waters, it's been a gas jamming with you!

>> Suzanne and Marshall, again, CADRE, and everybody on the webinar is deeply appreciative of your time, your knowledge, your expertise and experiences, and sharing all of that with us today. Thank you very much.

>> It was a pleasure, thank you.