

# Measuring Fidelity: Integrated MTSS and Systems Coaching

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## Fidelity Fridays: SPDG Special Interest Group

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# Icebreaker

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What's the best thing about being in our field today?



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# Today's Focus

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- Recent Developments in Fidelity of Implementation (FOI) Measurement
  - Systems coaching
  - Integrated MTSS (I-MTSS)

- Small group and whole group discussions
  - Resources at the end
- Questions and comments welcome at any time

# Objectives

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- Learn the latest developments in measuring I-MTSS and systems coaching fidelity.
- Reflect on how your context currently approaches measuring fidelity of I-MTSS and systems coaching.
- Identify actions steps you can take to further improve fidelity measurement.

# We Acknowledge The Common Challenges

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## Examples:

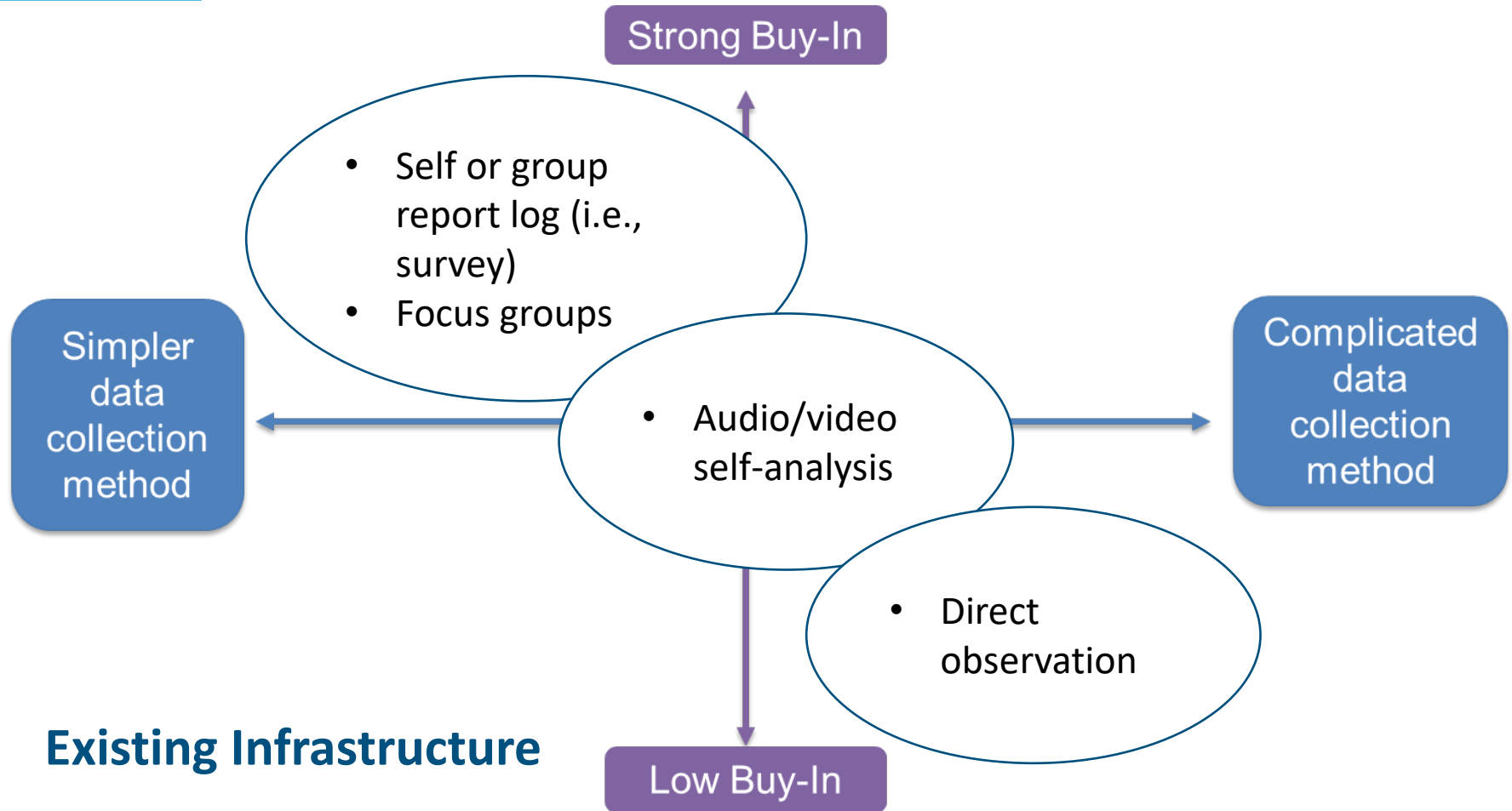
- Feasibility (e.g., time, personnel)
- Need for multiple measures (e.g., reading, math, school level, etc)
- Views
- Availability of measures in area of need
- Difficult to use data meaningful
- Unclear purpose
- Turnover

# Recommendations for Measuring Fidelity

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- Identify the questions you want to answer (i.e., research/evaluation questions).
- Consider the data collection strategies that users prefer and that are simple rather than complex.
- Measure as many aspects of fidelity as possible (i.e., adherence, dose, quality, responsiveness).
- Leverage existing infrastructure (i.e., What do we already have in place?).
- If you collect the data, use the data!

# Make Measuring Fidelity Easier!



# Recent Developments in Fidelity Measurement

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# Systems Coaching FOI

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# Requirements of a Fidelity Measure

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- All fidelity measures are assessments but not every assessment is a fidelity measure.
- To be a fidelity measure, it must provide data on one or more aspects of fidelity:
  - Quality
  - Exposure (i.e., dose, frequency, duration)
  - Responsiveness of staff and/or students
  - Adherence to essential features
  - Program specificity (i.e., differentiation; how well the innovation is defined and different from other innovations)

Gage et al., 2020; McKenna et al., 2014; NCII, n.d., O'Donnel, 2008; Ryan et al., 2024

# Measuring Systems Coaching Fidelity

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- Few measures exist.
- Nearly all reflect research that defines systems coaching as a strategy for supporting tiered systems implementation.
- One measure (a self-report) has been tested for its psychometric properties. *Is it a fidelity measure?*
- All measures reflect similar knowledge and skills (i.e., practices), and are grounded in the project/state's definition of coaching.
- Most measures rely on self-reports; 1 uses direct observation.

Barrett, 2012; Bradshaw et al., 2021; Chaparro et al., 2021; Hawkins, et al., 2019; Freeman et al., 2017; Forman, 2015; Pierce, 2024; Young et al., 2021

# Self-Report of Knowledge and Skills (and Quality?)

Reflects Oregon's  
expected definition  
of coaching

Reflects Florida's definition of  
coaching  
Tested for psychometric  
properties

**APPENDIX 6.1**  
**Systems Coach Self-Assessment**  
Ryan Jackson and Erin A. Chaparro  
Coaching and Learning, University of Oregon, 2014

Years of Coaching Experience: \_\_\_\_\_

Coaching and content skills required of Systems Coaches  
Implementation of Effective Behavioral and Instructional Support System  
Support (MTSS). You can use this self-assessment as a tool to  
goals for your own professional development. You can also share these results with your district's  
the district office can support you with the appropriate professional development.

**Please identify if you:**  
Strongly Disagree (1), Disagree (2), Agree (3), Strongly Agree (4)

**A. EBISS Evidence-Based Practices (EBPs):**  
I have the knowledge and skills to implement:

- Scientifically validated or evidence-based tiered programs for reading.  
I am fluent with this knowledge ① ② ③ ④ I am skilled to coach others in this area ① ② ③ ④
- Scientifically-validated or evidence-based tiered programs for behavior.  
I am fluent with this knowledge ① ② ③ ④ I am skilled to coach others in this area ① ② ③ ④
- Screening of all students to identify students at risk of poor outcomes (reading and behavior).  
I am fluent with this knowledge ① ② ③ ④ I am skilled to coach others in this area ① ② ③ ④
- Progress monitoring to assess student's reading and behavioral performance, student's rate of improvement, and responsiveness to instruction.  
I am fluent with this knowledge ① ② ③ ④ I am skilled to coach others in this area ① ② ③ ④

(continued)

Elements of this assessment were informed by the work of the National Implementation Research Network ([nirn.fpg.unc.edu](http://nirn.fpg.unc.edu)) and the Technical Assistance Center on Positive Behavioral Interventions and Supports ([pbis.org](http://pbis.org)). Specific references and resources can be found at the end.

The development of this assessment was supported by the Oregon Department of Education, through ED Grant No. H323A060007 to the University of Oregon. Reprinted with permission from Kathleen Ryan Jackson and Erin A. Chaparro.

From *Integrated Multi-Tiered Systems of Support: Blending RTI and PBIS* by Kent McIntosh and Steve Goodman, copyright © 2016 The Guilford Press. Permission to photocopy this appendix is granted to purchasers of this book for personal use or use with individual students (see copyright page for details).

**Directions:** Please read each statement carefully and then rate your ability to perform the skill in your current role and then rate your ability to teach the skill. The question is about your personal skill, not your ability to teach the skill. Use the following response scale:

Personal Skill	Personal Skill	Personal Skill
= Not Skilled (NS)	I do not have this skill.	I do not have this skill.
= Minimally Skilled (MnS)	I have minimal skills in this area; need substantial support to use it.	I need substantial support to teach this skill.
= Somewhat Skilled (SS)	I have this skill, but still need some support to use it.	I need some support to teach this skill.
= Highly Skilled (HS)	I can use this skill with little support.	I can teach this skill with little support.
= Very Highly Skilled (VHS)	I am very highly skilled in this area and can use it independently.	I can teach this skill independently.

**Interpersonal Communication Skills**

**The skill to:** \_\_\_\_\_ NS MnS SS HS VHS

- Develop and maintain a collaborative relationship when working with others
  - Your skill level
  - Your ability to **teach** this skill
- Develop consensus among a group of individuals
  - Your skill level
  - Your ability to **teach** this skill
- Ensure roles, responsibilities, and rules for decision-making (e.g., conflict, logistics, norms, etc.) are understood and agreed upon among a group of individuals working together
  - Your skill level
  - Your ability to **teach** this skill
- Summarize and paraphrase others' thoughts and statements for clarification and to confirm accuracy
  - Your skill level
  - Your ability to **teach** this skill

EBISS; Thoman, Sarah E., "Evaluation of the Psychometric Properties of the Systems Coaching Survey" (2019). Graduate Theses and Dissertations. <https://scholarcommons.usf.edu/etd/7970>

# Self-Report of Skills, Knowledge, and Quality

Reflects Florida's  
definition of  
coaching



## Component 1a: Interpersonal Communication - Collaborative Process

1	2	3	4
Develops and maintains a collaborative process that includes all of the following: • Open/trusting climate • Active participation • Non-judgmental discussions • New ideas fostered • Facilitation of consensus • Agreed-upon decision rules • Assigned/understood roles and responsibilities	Develops a collaborative process that includes most of the following elements: • Open/trusting climate • Active participation • Non-judgmental discussions • New ideas fostered • Facilitation of consensus • Agreed-upon decision rules • Assigned/understood roles and responsibilities	Develops a collaborative process that includes most of the following elements: • Open/trusting climate • Active participation • Non-judgmental discussions • New ideas fostered • Facilitation of consensus • Agreed-upon decision rules • Assigned/understood roles and responsibilities	Fails to develop and/or maintain a collaborative process

Evidence Comments:

## Component 1b: Interpersonal Communication – Communication Skills


1	2	3	4
Successfully utilizes interpersonal communication skills that include the following when appropriate: • Active Listening • Summarizing • Questioning • Paraphrasing • Delivering • Integrating • Empathizing	Successfully utilizes most of the following interpersonal communication skills when appropriate: • Active Listening • Summarizing • Questioning • Paraphrasing • Delivering • Integrating • Empathizing	Inconsistently utilizes necessary interpersonal communication skills when appropriate and/or unsuccessfully applies such skills	Fails to utilize appropriate interpersonal communication skills when appropriate

Evidence Comments:

Systems Coaching Innovation Configuration (IC) Map

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# Self-Report Log and Direct Observation Fidelity Measures of Adherence, Dose, and Quality

 **RIDE** Rhode Island Department of Education

## Systems Coaching Activity Log

Name

Coaching Partner Name (if applicable)

District or School Team?

Was a leader with decision making authority at the coaching session?  If you selected "specify"

Date of coaching

### Measure

Adaptive Skills: Domain 1	Look for	Score
<b>Relationship/alliance building strategies</b> to develop and maintain positive and collaborative working relationships.	<input type="checkbox"/> Helps the team use agreed upon consensus procedures, roles, responsibilities, and rules for decision-making. <input type="checkbox"/> Guides the team to have an agenda, assigned note taker, and assigned next steps at the end of the meeting. <input type="checkbox"/> Supports facilitate active participation among all team members. <input type="checkbox"/> Asks open-ended questions to encourage reflection, gain understanding, and elicit more detailed information (e.g. "What do we need to do next to advance MTSS implementation and improve student outcomes?"). <input type="checkbox"/> Summarizes others' thoughts and ideas to clarify and confirm accuracy. <input type="checkbox"/> Affirms difficulty of change.	<input type="checkbox"/> 0 – None observed but expected <input type="checkbox"/> 1 – Some or most observed <input type="checkbox"/> 2 – All observed
	<input type="checkbox"/> ...most accomplishments. <input type="checkbox"/> ...ent expertise (e.g., accessing and sharing resources, resources, and/or tools with the team; ...ent knowledge experts are active ...n needed). <input type="checkbox"/> ...sources, and tools that are culturally and <input type="checkbox"/> ...reliable connections to team members' <input type="checkbox"/> ...that recognize, support, and uplift diverse voices. <input type="checkbox"/> ...focus is equitable outcomes for students.	<input type="checkbox"/> 0 – None observed but expected <input type="checkbox"/> 1 – Some or most observed <input type="checkbox"/> 2 – All observed

SCFM Draft

- Reflect Rhode Island's definition of coaching
- Co-created and tested with RIDE and systems coaches

<https://web.miniextensions.com/vfaltJ9LWB33NwgMglf8>

# Reflection and Discussion

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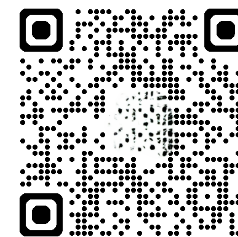
- How has systems coaching been measured in your context, if at all? How are the data used? What did you learn from the data?
- Share the challenges you face in your context with measuring fidelity of systems coaching. How have others productively addresses these concerns?
- If you haven't yet started measuring systems coaching fidelity, how might you get started this?

# I-MTSS FOI

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# What is I-MTSS?



Name of tiered system of support	Other names	Purpose	Distinguishing feature of tiered system
Positive Behavior Intervention Support ( <b>PBIS</b> ), Schoolwide PBIS (Sugai & Horner, 2009)	<ul style="list-style-type: none"> <li>Effective Behavior Support (EBS; Lewis &amp; Sugai, 1999)</li> <li>PBS (Sugai &amp; Horner, 2002)</li> <li>MTSS-Behavior (MTSS-B; Sugai &amp; Horner, 2020)</li> </ul>	Improving student social-emotional behavioral (SEB) outcomes	Focused on providing behavior and/or social-emotional supports
Response to Intervention ( <b>RTI</b> ; Fuchs et al., 2003)	<ul style="list-style-type: none"> <li>Response to Instruction (Kame'enui &amp; Simmons, 1998)</li> <li>MTSS-Reading (MTSS-R; Baker et al., 2010)</li> </ul>	Improving student academic outcomes	Focused on providing academic supports
Multi-Tiered System of Support ( <b>MTSS</b> ; Sugai & Horner, 2009)	<ul style="list-style-type: none"> <li>State-specific names</li> </ul>	Improving student academic and SEB outcomes	Focused on providing academic and SEB supports
Integrated MTSS ( <b>I-MTSS</b> ; McIntosh & Goodman, 2016)	<ul style="list-style-type: none"> <li>Comprehensive Integrated Three-Tier models (Ci3T; e.g., Lane et al., 2009)</li> <li>Interconnected Systems Framework (ISE; e.g., Eber et al., 2020)</li> </ul>	Improving student academic and SEB outcomes	Focused on providing strategically combined academic and SEB supports

# Measuring I-MTSS Fidelity

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- Many measures exist for measuring tiered systems (e.g., RTI, PBIS, MTSS).
- Many, particularly PBIS tools, have strong psychometric properties.
- Only 1 I-MTSS measure has been tested, and has strong reliability, content validity, structural validity, and social validity.

# Preview A Draft Resource!

## Measuring Tiered Systems of Support: Decision Guide



### Background and Purpose

Given that many tools exist for measuring tiered systems of support, it can be hard deciding which tool to use. Some tools are focused on the behavioral “side” of a tiered system (e.g., the Tiered Fidelity Inventory; Algozzine et al., 2019), while others are focused on the academic “side” of a tiered system (e.g., Reading Tiered Fidelity; St. Martin et al., 2015). Other tools aim to measure both sides of a tiered system, like the [MTSS Fidelity of Implementation Rubric](#) (AIR®, 2023). One tool, the [Integrated MTSS Fidelity Rubric](#), or IMFR (Gandhi et al., 2024), assesses the degree to which a school strategically combines the academic and behavior “sides” of a tiered system. Consider the three questions below to help your school/district make an informed decision about assessing tiered systems. Then, use Table 2 to select a measure.

1. **What are you trying to implement?** First, identify what the school/district intends to implement. Think carefully about this, because what your school/district intends to implement may be different from what is being implemented. Review Table 1 to identify which tiered system your school is implementing, regardless of what that system is called.

Table 1. Types of Tiered Systems of Support

Name of tiered system of support	Other names	Purpose	Distinguishing feature of tiered system
Positive Behavior Intervention Support (PBIS), Schoolwide PBIS (Sugai & Horner, 2009)	•Effective Behavior Support (EBS; Lewis & Sugai, 1999) •PBS (Sugai & Horner, 2002) •MTSS-Behavior (MTSS-B; Sugai & Horner, 2020)	Improving student behavioral outcomes	Focused on providing behavior supports
Response to Intervention (RTI; Fuchs et al., 2003)	•Response to Instruction (Kame'enui & Simmons, 1998) •MTSS-Reading (MTSS-R; Baker et al., 2010)	Improving student academic outcomes	Focused on providing academic supports

# Developments: Measuring I-MTSS Fidelity

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- Aspects of fidelity addressed in the IMFR:
  - Quality
  - Exposure (i.e., dose/frequency)
  - Responsiveness of staff and/or students
  - Adherence to essential features
  - Program specificity (i.e., program differentiation; how well the innovation is defined and different from other innovations)

Barrett, 2012; Bradshaw et al., 2021; Chaparro et al., 2021; Hawkins, et al., 2019; Freeman et al., 2017; Forman, 2015; Pierce, 2024; Young et al., 2021

# Self-Report of 5 Aspects of Fidelity

Integrated MTSS Fidelity Rubric (IMFR)

Domain 1. Instruction and Intervention					
	Beginning	Exploring	Aligning	Integrating	Sustaining
<b>1.1 Tier 1</b> <i>Tier 1 refers to the core curriculum and instructional practices delivered to all students.</i> <i>Tier 1 criteria:</i> (a) Tier 1 is evidence based. (b) Tier 1 is differentiated to address the needs of all learners. (c) Tier 1 is delivered with fidelity.	Tier 1 <u>does not meet all criteria</u> in any academic or SEB <sup>1</sup> area.	Tier 1 <u>meets all criteria</u> in at least <u>one academic area</u> <u>or</u> at least <u>one SEB area</u> .	Tier 1 <u>meets all criteria</u> in at least <u>one academic area</u> <u>and</u> at least <u>one SEB area</u> , <u>but</u> academic and SEB areas <u>are not combined</u> (i.e., they operate separately).	Tier 1 <u>meets all criteria</u> in at least <u>one academic area</u> <u>and</u> at least <u>one SEB area</u> , <u>and</u> academic and SEB areas <u>are intentionally combined</u> .	For at least two years, Tier 1 has <u>met all criteria</u> in at least <u>one academic area</u> <u>and</u> at least <u>one SEB area</u> , <u>and</u> academic and SEB areas <u>are intentionally combined</u> and documented in <u>policies and procedures</u> .
<b>1.2 Tier 2</b> <i>Tier 2 refers to interventions and supports that supplement the core curriculum and are provided to small groups of students who need more targeted instruction.</i> <i>Tier 2 criteria:</i> (a) Tier 2 is evidence based. (b) Tier 2 is supplemental to Tier 1. (c) Tier 2 is delivered with fidelity to a targeted group of students.	Tier 2 <u>does not meet all criteria</u> in any academic or SEB area.	Tier 2 <u>meets all criteria</u> in at least <u>one academic area</u> <u>or</u> at least <u>one SEB area</u> .	Tier 2 <u>meets all criteria</u> in at least <u>one academic area</u> <u>and</u> at least <u>one SEB area</u> , <u>but</u> academic and SEB areas <u>are not combined</u> (i.e., they operate separately).	Tier 2 <u>meets all criteria</u> in at least <u>one academic area</u> <u>and</u> at least <u>one SEB area</u> , <u>and</u> academic and SEB areas <u>are intentionally combined</u> .	For at least two years, Tier 2 has <u>met all criteria</u> in at least <u>one academic area</u> <u>and</u> at least <u>one SEB area</u> , <u>and</u> academic and SEB areas <u>are intentionally combined</u> and documented in <u>policies and procedures</u> .

<sup>1</sup> Social, emotional, and behavioral (SEB)

Reflects research-based definition of I-MTSS

# Reflection on Tiered Systems Measurement

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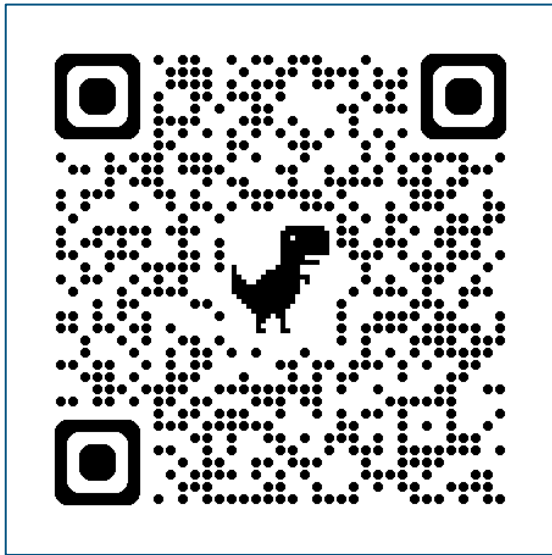
- What questions do you answer or want to answer about tiered systems implementation? Consider adherence, dose, responsiveness, and quality.
- Which data collection strategy (or, strategies) allow you to best answer those questions, considering the factors of buy-in and complexity presented on the prior slide? Why?
- Which measures are used in your context to measure tiered systems FOI? How are the data used? What did you learn?
- How have you handled using multiple FOI measures, if that has occurred in your context?
- If you haven't yet started measuring tiered systems fidelity, how might you get started this?
- Share the challenges you face in your context with measuring fidelity tiered systems. How have others productively addresses these concerns?

# Resources and Wrap Up

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# Special Series: Intervention in School and Clinic

- Focused on I-MTSS
- Articles are all open access and available to everyone.



<https://mtss.org/intervention-in-school-and-clinic-special-series/>



# What Integrated Practices “Look Like”

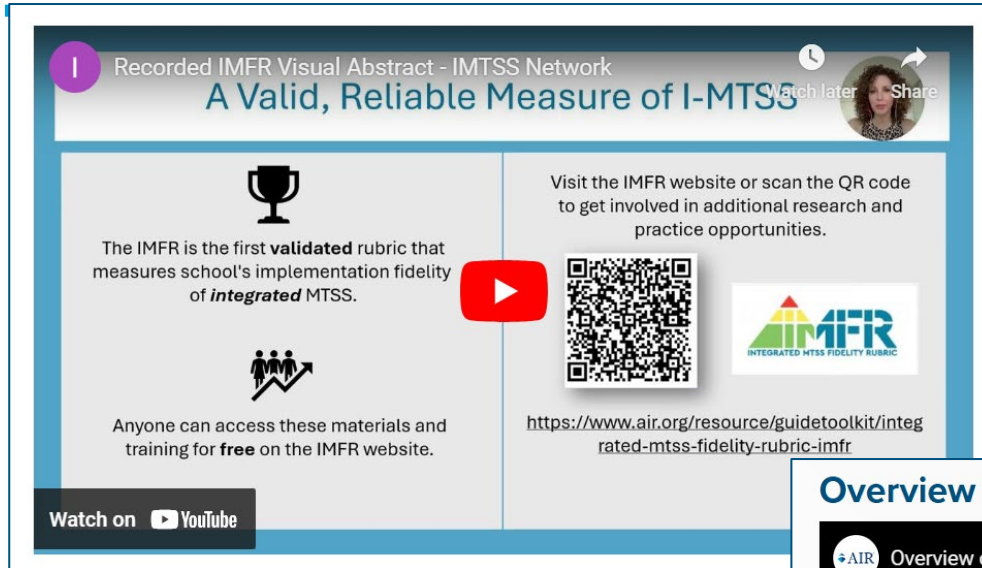


**Table 1.** Examples of Integrated Instruction and Intervention Practices.

Domain	Examples of integrated practices
Instruction and intervention	<ul style="list-style-type: none"> <li>• Embedding language of schoolwide or classwide SEB expectations into academic instruction</li> <li>• Reinforcing schoolwide or classwide SEB expectations during an academic lesson using praise or a token economy system</li> <li>• Building relationships with students</li> <li>• Identifying root cause of behavior and academic struggles</li> <li>• Embedding academic behaviors into Check-in Check-out charts</li> <li>• Collaboration between behavior support specialists and academic interventionists</li> <li>• Embedding components of Behavior Intervention Plan into core instruction and academic interventions</li> </ul>
Assessment	<ul style="list-style-type: none"> <li>• Exporting academic and SEB data from electronic assessment programs into a program that will display all data together</li> <li>• School leaders ensuring grade level data teams and relevant staff have access to academic and SEB data for all students</li> <li>• Training teachers and staff in how to manage and use data program to create data dashboards that are shared with all relevant staff</li> </ul>
DBDM	<ul style="list-style-type: none"> <li>• Data decision rules that include academic and SEB data to match or adapt interventions</li> <li>• Grade level data team reviewing student screening data for academics and SEB then uses the building data decision rules to identify students who need additional supports and plan the focus for instruction and intervention</li> <li>• Prioritizing conversations about how academic and SEB screening data are reviewed to determine if/how SEB concerns are impacting academics, and vice versa</li> <li>• Academic and SEB data aggregated at the school level are reviewed and used collectively to understand I-MTSS at a systems level</li> </ul>

Majeika et al. (2024)

# The IMFR and I-MTSS (AIR)



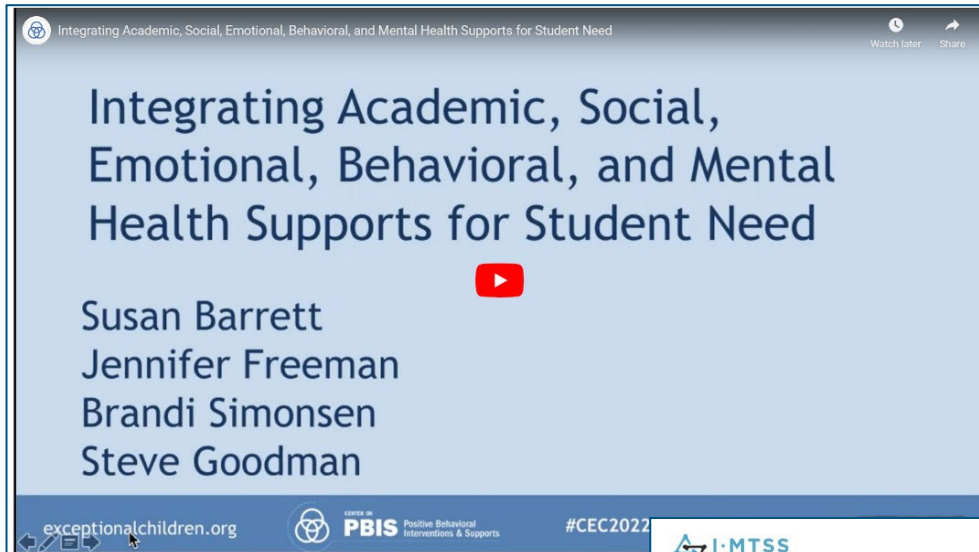
Additional videos and resources on I-MTSS:

<https://mtss4success.org/resource/integrated-mtss-rubric>

Get the IMFR:  
<https://www.air.org/resource/guidetoolkit/integrated-mtss-fidelity-rubric-imfr>

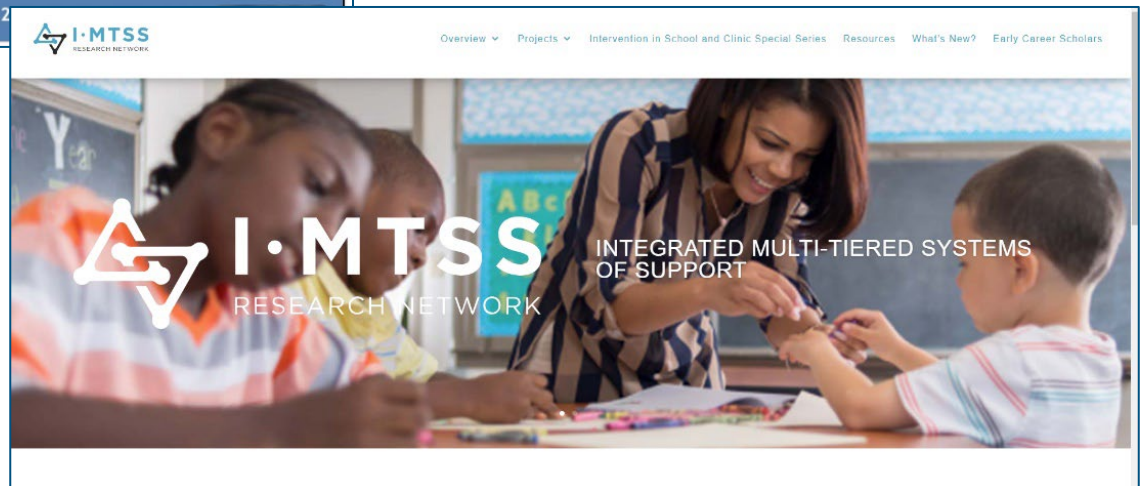


# Other I-MTSS Resources

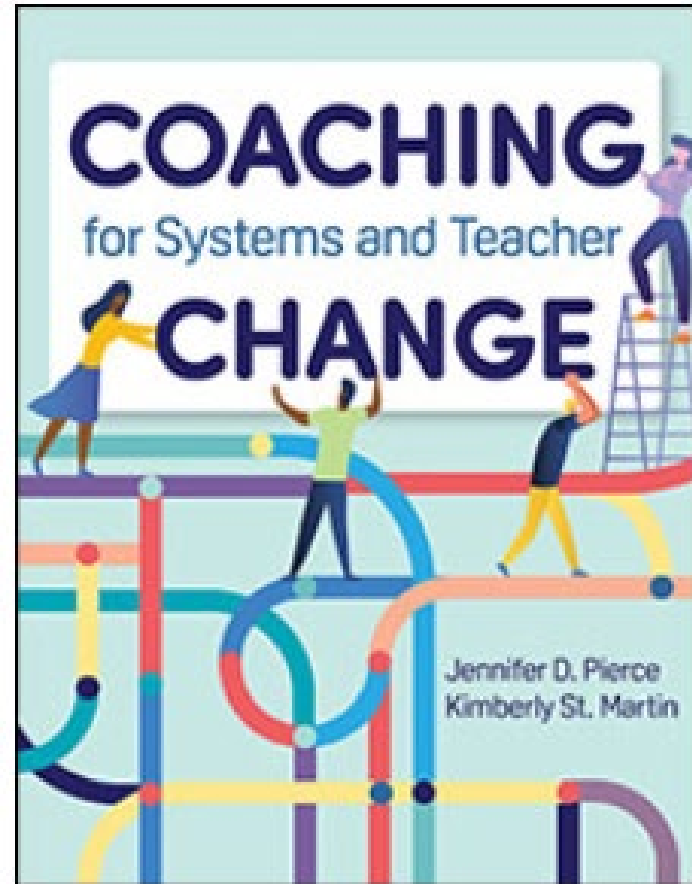
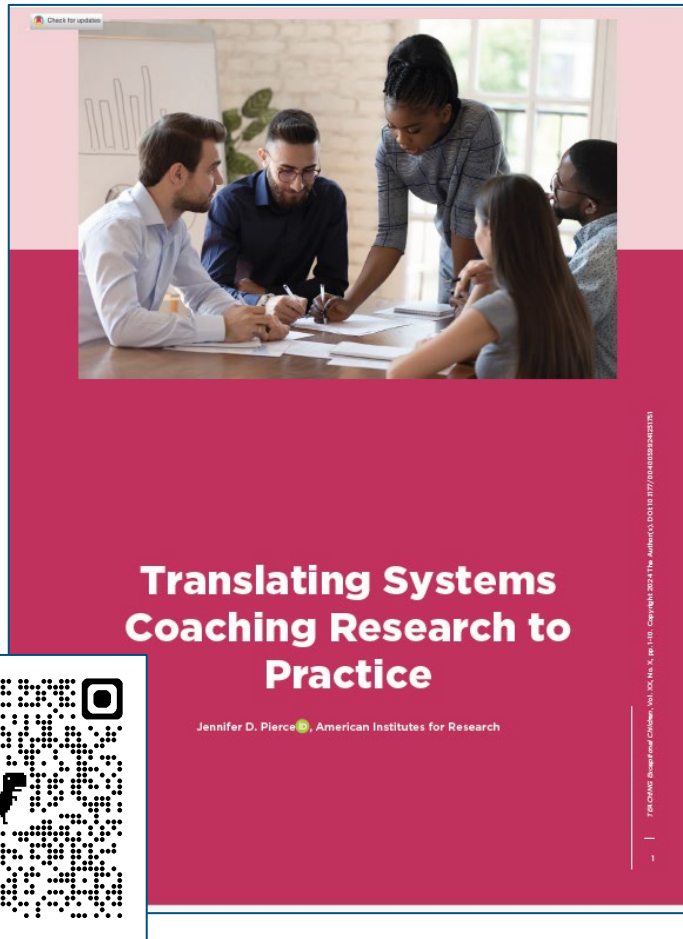


Video on Integration:  
<https://www.pbis.org/video/integrating-academic-social-emotional-behavioral-and-mental-health-supports-for-student-need>

I-MTSS Network:  
<https://mtss.org/>



# Systems Coaching Resources



Pierce (2024); Pierce & St. Martin (2023)



# Reach Out for Additional Support!

## Maximize Your Systems Coaching Program



Training builds knowledge, but systems coaching is necessary for improving teams' skills for achieving schoolwide change.

AIR's innovative and comprehensive services are designed to help our clients use systems coaching.

### Our Services

*We help you implement systems coaching.* The cornerstone of our services is to build the capacity of State Education Agencies (SEAs) and Local Education Agencies (LEAs) to successfully implement systems coaching. We deliver high-quality, ongoing professional learning and technical assistance for systems coaches so that their work with teams is data-based, action-oriented, collaborative, and aligned with school and student improvement goals. Moreover, our work aligns with SEA and LEA efforts to achieve improved outcomes for all students.

### Outcomes that Matter

*SEAs and LEAs working with AIR will implement a research-based model of systems coaching for teams.*

By working with AIR, SEAs and LEAs can expect to:

- ✓ Understand systems coaching research and its practical applications
- ✓ Develop a feasible system coaching role
- ✓ Set achievable goals for systems coaching
- ✓ Collect and use data to identify the impact of systems coaching and to continuously improve its use
- ✓ Bring together staff to employ a coherent model of systems coaching
- ✓ Develop systems coaches' knowledge and skills in their role through professional learning opportunities
- ✓ Improve how teams lead and monitor schoolwide change efforts and improve outcomes for all students, with a particular focus on improving outcomes for students with disabilities.

### The AIR Difference

Our highly qualified team provides flexible, customized, and ongoing technical assistance to SEAs and LEAs around the country. Our approach is always grounded in evidence and our processes aim to contribute to a better world.

To learn more, contact Jennifer Pierce at [jpierce@air.org](mailto:jpierce@air.org).

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### Systems Coaching:

*A strategy for improving how teams achieve schoolwide change to improve the academic, social, emotional, and behavioral outcomes of student with and without disabilities.*



## Integrate Your Multi-Tiered System of Support



Is your school, district, region, or state looking to advance Integrated Multi-Tiered System of Support (I-MTSS) implementation to better meet the needs of all students? AIR has a solution for you.

### Our Services

The cornerstone of our services is to use the **Integrated MTSS Fidelity Rubric (IMFR)** to identify current I-MTSS implementation strengths and areas for improvement. **We use the IMFR because it is the only valid and reliable measure of I-MTSS.** The result? You can be confident that the data are accurate.

Our highly skilled staff will then partner with you to:

- ✓ Review and explain IMFR results.
- ✓ Develop a feasible, cost-effective, and customized technical assistance plan that is aligned with school and student improvement goals.
- ✓ Deliver high-quality technical assistance to improve I-MTSS implementation and supports for all students.

### Outcomes that Matter

By working with AIR, you can expect to:

- ✓ Understand what I-MTSS is, why it is important, and how it can help students.
- ✓ Identify school I-MTSS implementation strengths and improvement areas.
- ✓ Set achievable goals for I-MTSS.
- ✓ Bring together staff to build readiness for I-MTSS and reduce implementation inefficiencies that contribute to staff burnout and misused resources.
- ✓ Build staff capacity for integrating academic and social-emotional behavioral supports.

### The AIR Difference

**Our approach is always grounded in evidence and aims to contribute to a better world.** Our innovative services help our clients improve how they implement I-MTSS so that students' comprehensive needs are better met.

### What is I-MTSS?

I-MTSS is what MTSS was originally intended to be: The **strategic combination** of the academic "side" and the social-emotional behavioral "side" of tiered systems.

### Benefits of Integrating:

- ✓ Better meet the comprehensive needs of all students.
- ✓ Improve efficiency of implementation.
- ✓ Improve staff knowledge and skill for how, why, and when to integrate academic and social-emotional behavioral supports.



To learn more, contact [IMFR@air.org](mailto:IMFR@air.org).

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# Culminating Reflections: 3, 2, 1, 1

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- What are your **3** key takeaways?
- What **2** questions do you have?
- What is **1** action you will take following this meeting?
- What is **1** word that captures your reaction to today's session?



# Thank You!

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