



New Mexico State Advisory Panel
Annual Report
2026-2027

Panel's Purpose:

The purpose of the Panel is to provide advice and guidance with respect to special education and related services for children with disabilities as required by the Individuals with Disabilities Education Improvement Act of 2004 ("the Act") and its implementing regulations. The panel provides policy guidance with respect to special education and related services to the PED, including the Office of Special Education.

Message from the Chair:

It has been a privilege to serve as Chair of the New Mexico State Advisory Panel during the 2026–2027 academic year, and an honor to have held this role for the past two years. Throughout my term, I have been continually inspired by the dedication, expertise, and compassion each member brings to our shared mission of improving outcomes for students with disabilities across New Mexico.

This year, the Panel continued its important work advising the Public Education Department on issues central to special education. We launched our annual strategic planning retreat, re-established our committees, and deepened our focus on behavior, discipline, and transition planning. Both committees engaged thoughtfully with statewide partners, reviewed emerging data, and developed recommendations that reflect the lived experiences of students, families, and educators.

We strengthened collaboration with the Office of Special Education, receiving regular updates on monitoring and compliance, dispute resolution, professional development, and statewide initiatives. We also reviewed and updated our bylaws, incorporating recommendations aligned with the Yazzie/Martinez Action Plan, and welcomed new members whose perspectives have already enriched our work.

This year's efforts also elevated critical issues such as informal removals, restraint and seclusion, disproportionality, and transition readiness, areas where consistent statewide guidance and strong cross-agency collaboration remain essential. While the Panel prepared for a joint meeting with the Interagency Coordinating Council, that meeting will take place in the upcoming fiscal year, ensuring continued partnership and alignment moving forward.

As my term concludes, I want to express my deep appreciation to every member of the Panel. Your commitment, thoughtful dialogue, and willingness to engage in challenging conversations have strengthened our collective impact. It has been a privilege to serve alongside you.

I am confident that the Panel will continue advancing meaningful change in the years ahead, expanding statewide training, improving access to behavior and transition supports, enhancing data transparency, and strengthening collaboration across agencies. Together, you will continue working toward a system where every child receives a free and appropriate public education in the least restrictive environment, supported by families, educators, and communities who believe in their potential.

With appreciation,



Jennifer Donelli

Chair, New Mexico Special Advisory Panel

Membership and Officers:

The Panel is comprised of a variety of stakeholders, including parents, educators, administrators, representatives from institutions of higher education, and representatives from public and private agencies.

Last Name	First Name	Representative Group
Baland	Mollie	Teacher/Self Advocate
Charley	Jenilee	Administrator (School for the Blind and Visually Impaired)
Donelli	Jennifer	Parents Reaching Out (PRO)/Parent
Hamilton	Lisa	Children, Youth, and Families Department (CYFD)/Parent
Keck	Lisa	Charter School
Kulidge	Christa	Community Member
Lewis	Hart	Higher Education
Madrid	Robert	NM Correction Department
Malone	Dana	Homeless Education
Melendez	Larry	Division of Vocational Rehabilitation (DVR)
Mortensen	Carli	Parent
Nesbitt	Laurel	Disability Rights New Mexico (DRNM)/Parent
Owens	Amanda	Teacher/Parent
Powell	Jessica	CES LEAP/Parent
Terry	Damon	REC 6 (State Agency)/Parent
Wassana	Melissa	Education for Parents of Indigenous Children with Special Needs (EPICS)

Duties of the Panel:

1. Advise the PED of unmet needs within the State in the education of children with disabilities;
2. Comment publicly on any rules or regulations proposed by the State regarding the education of children with disabilities;
3. Advise the PED in developing evaluations and reporting on data to the Secretary of the U.S. Department of Education under Section 618 of the Act;
4. Advise the PED in developing corrective action plans to address findings identified in Federal monitoring reports under Part B of the Act; and
5. Advise the PED in developing and implementing policies relating to the coordination of services for children with disabilities

Panel Meeting 2025-2026 Schedule:

- September 4th and 5th, 2025 in Farmington, NM
- November 7th and 8th, 2025 Virtually
- February 19th and 20th, 2026 Virtually
- May 14th and 15th, 2026 at Silver City High School

Panel Committees for 2025-2026:

1. Behavior and Discipline Committee

- **Focus:** Promote positive, safe, and legally compliant approaches to behavior, discipline, and student support.
- **Tasks:**
 - Monitor and address informal removals and restraint practices.
 - Provide guidance and recommendations to ensure compliance with IDEA and protect student rights.
 - Support the Office of Special Education in adopting proactive, equitable discipline strategies.

2. Transition Planning Committee

- **Focus:** Support students, especially those in special populations and high-risk categories, as they move through educational stages and into graduation and post-school opportunities.
- **Tasks:**
 - Develop graduation readiness supports and interventions.
 - Address the needs of special populations and students at high risk of not completing school.
 - Ensure transition planning aligns with IDEA and state requirements.

Quarter 1 Accomplishments:

The panel started off the year by hosting its first strategic planning retreat. The Panel did a SWAT analysis to establish its committees and a workgroup to review the bylaws. We received updated information on the new graduation requirements at our meeting, as well as, professional development and family engagement from the Office of Special Education. We also were able to have students from Project Search share about their experience in the program.

Quarter 2 Accomplishments:

At our meeting, we received a presentation on the NM Deaf-Blind Project Intervener Training. We received updates from the Office of Special Education on professional development, monitoring and compliance, and dispute resolution. We were also able to submit applications to the governor's office to fill the vacant position we had on the panel.

Quarter 3 Accomplishments:

We received presentations on the following topics at our meeting: General Office of Special Education Updates, Disability Innovation Fund, Professional Development, Monitoring and Compliance, New Mexico Summer Reading Program, Data, Finance, and Dispute Resolution. The Bylaw workgroup was also able to review and update our bylaws to reflect suggestions from the Yazzie/Martinez Action Plan. The 3 vacancies on the Panel were filled, and the new members were able to attend their first meeting.

Quarter 4 Accomplishments:

We received a presentation from Safe & Healthy Schools on Connecting Behavior as Communication and Finding Meaningful Ways to Engage Students to Reduce Discipline Issues and Increase Student Wellness. We also received updates from the Office of Special Education on Monitoring and Compliance, Professional Development, Data Update and SPP/APR Report, and Dispute Resolution update. We also voted on the new bylaws that incorporated some suggestions from the Yazzie/Martinez Action Plan. We also scheduled a joint meeting with the Interagency Coordination Council and our annual strategic planning retreat for FY27.

Final Recommendations:

Behavior and Discipline Committee:

- 1) Tiered Statewide Behavior Training for School Personnel. The Subcommittee recommends that NMPED, in partnership with Lives in the Balance (LITB), design, seek funding for, implement, and evaluate a tiered behavioral support training for school personnel statewide, based on LITB's Collaborative Proactive Solutions (CPS) model, as set forth in greater detail in the attached proposal and related documentation.
- 2) Access to Documents Necessary to Provide Students Appropriate Behavioral Supports [BIPs, IEPs and 504 Plans (behavior goals and accommodations), and other key behavior support documents]. We recommend the following:
 - A.** Staff who work directly with the student and need the information to perform their duties should have access to relevant portions of the IEP/BIP.
 - a. This may include general education teachers, special education teachers, related service providers, substitutes (when necessary), transportation staff, behavior specialists, paraprofessionals / Educational Assistants, administrators, cafeteria/playground staff, and others responsible for implementing supports or ensuring safety.
 - b. System Access to relevant portions of IEP as well as physical or digital copy, including all updates.
 - B.** Access should be limited to a legitimate educational need.
 - a. Not every employee needs the full IEP or full BIP.
 - b. Staff should receive the information necessary to implement accommodations, behavior supports, safety plans, crisis procedures, or behavior goals relevant to their role.
 - C.** Behavior supports cannot be implemented effectively if staff are unaware of them.
 - a. If a student has behavior accommodations, de-escalation procedures, reinforcement systems, sensory supports, or safety interventions in the IEP/BIP, the responsible staff must be informed and trained as appropriate.
 - D.** Confidentiality still applies.
 - a. Information should not be shared casually or discussed with staff who do not work with the student.
 - b. Records must be stored and transmitted securely.
 - E.** Documentation and training matter.

- a. Districts should document which staff received notice of accommodations/BIPs and may provide training when supports involve crisis response, restraint/seclusion rules, or specialized interventions.
 - F.** Emergency/safety considerations may require broader communication.
 - a. When a behavior plan includes elopement risks, aggression, medical/sensory needs, or crisis procedures, schools may need to ensure all supervising staff understand essential safety supports.
- 3) **Informal Removal Guidance.** The Subcommittee recommends that prior to or during the 2026-27 school year, NMPED create specific guidance, including a technical assistance manual, addressing informal removals and their relationship to disciplinary rights and procedures applicable to students with disabilities. The Subcommittee recommends that in creating such guidance documents, NMPED carefully review national studies and reports on the practice of informal removal, including but not limited to the 2022 report from the National Disability Rights Network entitled “Out from the Shadows: Informal Removal of Children with Disabilities from Public Schools,” <https://www.ndrn.org/wp-content/uploads/2022/01/Out-from-The-Shadows-1.pdf>, and address, at a minimum, the following practices.
- A. Parents frequently called to pick up their child early because of behaviors;
 - B. Repeated or long-term use of a shortened school day, where a child is generally sent home at a fixed time every day;
 - C. Entering into “Agreements in Lieu of Suspension” or related contracts;
 - D. Placing children on homebound instruction, almost always with fewer than ten hours (often only 1-5 hours) of in-person tutoring per week due to behaviors related to the child’s disability;
 - E. Placing children on virtual or remote education due to behavior related to the child’s disability;
 - F. Bus removals; and
 - G. Recess/Lunch detentions without documentation.
- 4) **Restraint/Seclusion Legislation.** The Subcommittee recommends that NMPED, in alignment with its commitment in Martinez-Yazzie Action Plan Item 1.3d, again propose legislation for the 2027 legislative session “limiting the use of physical restraint and prohibiting seclusion and chemical, mechanical, and prone restraint.” The Subcommittee further recommends that the proposed legislation address more of the concerns of the Senate Memorial 68 Working Group recommendations, as well as those made by the IDEA Part B Panel Policy and Procedures Subcommittee

in the Panel's 2025-26 Annual Report. The Subcommittee further recommends enhanced statewide reporting, accuracy and consistency in data collection practices, public transparency, and oversight related to restraint and seclusion incidents, including analysis of trends by disability category and educational placement.

- 5) **NMPED and School District Data—Exclusionary Discipline and Disproportionality.** The Subcommittee recommends that the NMPED provide clear formal objections by the May 22, 2026 public comment deadline, to the proposal of the Department of Education Office of Special Education Rehabilitative Services (OSERS) to eliminate from State Performance Plan and Annual Performance Report (SPP/APP) reporting the indicators addressing Suspension and Expulsion of all children with IEPs (Indicator 4a), and further disaggregated by race/ethnicity (Indicator 4b). In its Martinez-Yazzie Action Plan, NMPED identified such disproportionality data as an important measure of the need for improved behavior supports (see, e.g., Action Item 1.3c) and other interventions like restorative justice (see, e.g., Action Item 3.3b). Given NMPED's commitment to the important role discipline/disproportionality data serves, the Subcommittee recommends that NMPED continue its practice of collecting and analyzing such data regardless of any decision of OSERS to eliminate Indicators 4a and 4b.
- 6) **Attendance for Success Act Amendment—Administrative Absence.** The Subcommittee recommends that the NMPED propose an amendment to the Attendance for Success Act to include an additional attendance category: "An "administrative absence" means a full-day or partial-day absence from instructional services, whether planned or unplanned, resulting from action by school personnel outside formal disciplinary procedures."

The Subcommittee further recommends that this new attendance category be tracked in the new SIS system: "The department shall establish attendance reporting procedures that distinguish administrative absences from other attendance categories. Attendance reporting shall distinguish between absences caused by student or family nonattendance and absences, partial-day absences, abbreviated school days, or removals initiated, requested, or directed by school personnel."

- 7) **Rule Amendment—Tiered Behavior Training for School Personnel.** The Subcommittee recommends that NMPED propose a rule amendment to 6.31.2.9 (Public Agency Responsibilities), Section (B)(9): new section "(c) Each public

agency and charter school shall provide tiered training to school personnel in evidence-based behavioral support practices designed to support student participation in classroom instruction, identify and address factors impacting student regulation and participation, reduce loss of instructional time, and promote proactive and collaborative problem-solving approaches.”

Please also review the document linked below:

- [26-6-29 FINAL Recommendations--Tiered Behavior Support Training for School Personnel \(003\).docx](#)

Transition Committee:

The transition committee continued work on focusing on transition preparation for secondary students with disabilities. We continue to advocate for the OSE to collaborate with other departments within the PED and state to offer transition training and support to transition specialists across the state. The OSE continues to look into the possibility of hosting transition-specific office hours.

The committee also strongly recommends that OSE work with the legislature to set aside funding specific to transition requirements and fully fund transition specialists through the SEG. The committee recommends continuation of the transition committee so that the work can continue to expand throughout all levels of transition with a continued focus on the most at-risk populations (highly mobile, foster care, justice system youth, etc.)

Proposal: Tiered Behavior Support Training for School Personnel

Background: The primary focus of the work of the IDEA Part B Panel's Behavior and Discipline Subcommittee's (the Subcommittee) for the 2025-26 school year has been review and evaluation of options for effective, substantive, evidence-based training to enable school staff statewide to support the behavioral needs of students whose behavior interferes with their learning and their success in school. Without effective behavior supports, many students struggle to remain in school and to benefit academically and socially. In particular, students with disabilities and students of color suffer from the lack of appropriate and effective behavior supports. They are disproportionately subjected to punitive and exclusionary practices like suspension, expulsion, shortened day, informal removals, law enforcement intervention, physical restraint, and seclusion—common symptoms of a system of inadequate behavior support.¹

In the course of this work, the Subcommittee met several times with Office of Special Education (OSE) staff, who share an interest in ensuring that school personnel are prepared to meet the behavioral needs of students with disabilities, recognize that there is a need for this type of training, and have begun to provide training opportunities. The Subcommittee was pleased to have that collaboration opportunity. However, in recognition of the separation of the SEA and the IDEA Part B Panel, it is important to clarify that this Tiered Behavior Support Training proposal represents the views and recommendations of the Subcommittee, not of the OSE nor its staff.

Description of Proposed Training: This Proposal would require and fund tiered behavioral support training for school personnel in various roles, especially those commonly called upon to support and respond to student behavior. Given the tiered nature of this training, all school personnel will increase their awareness, knowledge and skills in supporting students with challenging behaviors.

The training will center relationship-building, trauma-informed practices, and proactive prevention over reactive response. It will require consistent, sustainable implementation

¹ See, for example:

- Questions and Answers: Addressing the Needs of Students with Disabilities and IDEA's Discipline Provisions (July 2022), <https://sites.ed.gov/idea/files/qa-addressing-the-needs-of-children-with-disabilities-and-idea-discipline-provisions.pdf>
- Discipline Disparities for Black Students, Boys, and Students with Disabilities (March 2018), <https://www.gao.gov/products/gao-18-258>
- Out from the Shadows: Informal Removal of Children with Disabilities from Public Schools (January 2022), <https://www.ndrn.org/wp-content/uploads/2022/01/Out-from-The-Shadows-1.pdf>
- LESC Hearing Brief (Restraint/Seclusion): <https://www.nmlegis.gov/handouts/ALESC%20072424%20Item%203%20.1%20-%20Restraint%20and%20Seculsion%20LESC%20Brief.pdf>
- Senate Memorial 68 Working Group Report (Restraint/Seclusion): <https://www.nmlegis.gov/handouts/ALESC%20072424%20Item%203%20.2%20-%20Restraint%20and%20Seclusion%20Working%20Group%20Report%20Appendix%201.pdf>

statewide, across schools, perhaps with a pilot rollout. It will further incorporate coaching and modeling, as well as NMPED level structure, staff, and expertise to support implementation. Moreover, it would require sufficient funding, clear metrics, and an evaluation structure to ensure efficacy.

The Subcommittee recommends that the NMPED coordinate with Lives in the Balance (LITB), a 501(c)(3) nonprofit organization, to design a tiered training model based on LITB's Collaborative Proactive Solutions (CPS) model, tailored to address the known needs of New Mexico students with disabilities. This evidenced based model by Dr. Ross Greene is based on years of his work with families, students, educators, group home staff and others. (For research on this model, see <https://livesinthebalance.org/research/>). Implementation of the model in other states, such as Washington, Maine, and Massachusetts, has led to dramatic, rapid, and durable reduction in practices like restraint and seclusion.

Dr. Ross Greene of LITB gave a presentation to a combined group of Subcommittee members and representatives of the Office of Special Education (OSE) on April 20, 2026. Dr. Greene's presentation slides (Attachment 1), as well as two brief information sheets (Attachments 2 and 3), are included with this Proposal.

The CPS Model—Some Key Characteristics:

- It is driven by the belief that “kids do better when they can.”
- It is a problem-solving—not behavior modification—model;
- It views behavior as a “signal” or symptom, and maintains that modifying the behavior simply modifies the signal without addressing or solving the underlying problem;
- It emphasizes that “response” to behavior (including de-escalation) is too late. Rather, the aim is to get ahead of the behavior proactively;
 - Training on de-escalation techniques may still be necessary, but we should prioritize proactive approaches that prevent the need for de-escalation.
- Rather than “antecedents,” the CPS model focuses on “unmet expectations,” or “unsolved problems;”
- “Unsolved problems” are “specific expectations a child is having difficulty meeting;”
- The model also focuses on skills students need to develop to be able to meet expectations and solve problems;
- The model is rooted in collaboration with students to identify problems to be solved.

The CPS Model differs from many behavior programs, including those currently implemented by OSE, where it helps adults (1) view children through more empathic, compassionate, accurate, and productive lenses, (2) identify their own (adults') concerns and expectations and why they feel they are important, (3) collaborate with children to identify unsolved problems and needed skills, and (4) engage children proactively in solving the problems that affect their lives and learning.

Tiered Training: Dr. Greene's model lends itself to a tiered training approach. The Subcommittee's proposal starts from the understanding that all school personnel who regularly interact with students with disabilities with disability-related behavioral differences need to have some level of familiarity with appropriate behavioral support, but that the depth and breadth of training would naturally vary according to their roles.

Tier 1: In describing his model, Dr. Greene outlines the first step as an investigation of an individual's beliefs about why children exhibit challenging behaviors. Training at this initial tier

will emphasize that behavior is communication or a “signal” that a child is struggling with an unsolved problem or multiple unsolved problems. Training at Tier 1 will also help personnel recognize escalation behaviors and dysregulation, and how to coordinate with the child’s team to learn the supports and accommodations that may be needed to avoid behavior.

At this tier, training could be developed for bus drivers, cafeteria workers, PE teachers and others with little or no pre-service behavioral training.

Tier 2: At this tier, special education directors and other special educators and related service providers, regular education teachers, school-based administrators, crisis team members, and any other personnel regularly called upon to respond to and address student behavior and discipline will receive training. At this level, personnel will be taught (at a minimum) to understand the CPS model, to collaborate with a child in the moment to identify the unsolved problems, and to provide accommodations and supports to prevent the behavior. Training at this tier would involve at least basic familiarity with the Addressing Skills and Unsolved Problems worksheet, which is the focus of Tier 3 training. These accommodations and supports will likely come from individuals who are trained at the highest level and who are tasked to share information with their colleagues to proactively support the student.

Tier 3: At the highest tier, personnel will be trained to use the Addressing Skills and Unsolved Problems worksheet and to share results with school colleagues. This is the primary worksheet used in the CPS model. The instrument provides (in Step 1) a selection of skills which can be identified as “difficult for the child to access at times and appear[] to be making it difficult for the child to handle problems and frustrations and/or meet certain expectations. It provides (in Step 2) helpful questions to be used identifying, articulating, and writing unsolved problems. The ASUP worksheet, included here as **Attachment 4**, is also available on the LITB website, along with related resources and guides: <https://livesinthebalance.org/cps-materials-paperwork/>

Individuals at the highest tier would be identified as the collectors of this information and the individuals responsible for sharing this – this could be a variety of individuals depending upon the structure at a given school and supports identified for an individual student but would most likely be individuals responsible to support the student’s behavior and listed in the students IEP.

NMPED Personnel. The Subcommittee further recommends that there be funding for dedicated full-time staff with behavior expertise within NMPED’s Office of Special Education to support implementation, as well as funding for consultation, modeling, and related supports needed for successful implementation.

Evaluation. A funded evaluation structure would be critical, to assess the effectiveness of the initiative at the conclusion of each year. The evaluation structure could be guided by previous efficacy studies of the model and would take into account metrics important to the Office of Special Education.

Funding: The Subcommittee recommends that NMPED seek sufficient funding from the legislature to support the initiative over time, including any pilot program that would be put in place. The proposal is intended to be a recurring permanent source of funding for the initiative.

An Evidence-Based Alternative To Traditional Psychosocial Treatment for Kids Who Are Struggling

Ross W. Greene, Ph.D.



Paradigm Shift/Key Theme #1

**Emphasis is on problems
rather than on behaviors.**

Paradigm Shift/Key Theme #2

**The problem solving is
collaborative, not unilateral.**

Paradigm Shift/Key Theme #3

**The problem solving is
proactive, not reactive.**

Paradigm Shift/Key Theme #4

Kids do well if they can.

Operationalizing Change



Identify skills
and unsolved
problems



Solve problems
collaboratively and
proactively

Operationalizing Change

- **Identify skills and unsolved problems**
- Solve problems collaboratively and proactively

- Helps make intervention proactive rather than reactive
- **Skills:** Helps adults view kids through more compassionate, accurate, productive lenses
- **Unsolved Problems:** If we don't identify problems proactively we won't solve them proactively... and we'll always find ourselves in the heat of the moment dealing with behavior.

Operationalizing Change

- Identify skills and unsolved problems
- **Solve problems collaboratively and proactively**

- Promotes a problem-solving partnership
- Engages kids in solving the problems that affect their lives
- Produces more effective, durable solutions
- Simultaneously enhances skills

Assessment of Skills and Unsolved Problems (ASUP 2024)

ASUP 2024

ASSESSMENT OF SKILLS AND UNSOLVED PROBLEMS

Collaborative & Proactive Solutions
THIS IS HOW PROBLEMS GET SOLVED

CHILD'S NAME:

DATE:

NAMES OF CAREGIVERS COMPLETING THIS INSTRUMENT:

STEP 1: SKILLS

Whether neurotypical or neurodivergent, children communicate that they're having difficulty meeting expectations in diverse ways, including through their concerning behavior. This behavior is best conceived as a frustration or stress response, the nature of which is determined by a variety of factors, most especially certain skills related to flexibility/adaptability, frustration tolerance, problem solving, and emotion regulation. Some kids can demonstrate these skills under some conditions but not under other conditions.

This section is aimed at helping caregivers discuss those skills and the degree to which they may be impacting a particular child. Being aware of and considering the skills that may impact a child's capacity to handle life's problems and frustrations and meet various expectations helps caregivers move away from motivational explanations for concerning behavior (e.g. attention-seeking, manipulative, coercive, unmotivated) and toward a more compassionate, accurate understanding of such behavior. Note that these skills are not the primary focal point of intervention in the CPS model; the unsolved problems you'll be identifying in Step 2 will be the "targets" of intervention.

☐ Please check off a skill if it's difficult for the child to access at times and appears to be making it difficult for the child to handle problems and frustrations and/or meet certain expectations:

- | | | |
|---|---|--|
| ☐ Maintain focus | ☐ Consider a range of solutions to problems | ☐ Regulate emotional response to problems and frustrations |
| ☐ Regulate activity level | ☐ Flexibly handle ambiguity, uncertainty | ☐ Empathize with others, appreciate another person's perspective or point of view |
| ☐ Handle transitions, shift from one mindset to another | ☐ Shift from original idea, plan, or solution | ☐ Interoception (ability to understand and feel what's going on inside their body) |
| ☐ Consider the likely outcomes or consequences of actions (impulse control) | ☐ Express concerns, needs, or thoughts in words or other means of communication | ☐ Tolerate and manage the sensory environment |
| ☐ Persist on challenging or tedious tasks | ☐ Understand what is being communicated by others | |
| ☐ Sense of time (time that has passed, time needed) | ☐ Appreciate how their actions affect others | |

STEP 2: UNSOLVED PROBLEMS

Unsolved problems are the specific expectations a child is having difficulty meeting. The wording of an unsolved problem will translate directly into the words that you'll be using when you introduce the unsolved problem to the child when it comes time to solve the problem together. Poorly worded unsolved problems often cause the problem-solving process to deteriorate before it even gets started. Please reference the ASUP Guide for guidance on writing unsolved problems.

SCHOOL/FACILITY PROMPTS

- Are there specific tasks/expectations the student is having difficulty completing or getting started on?
- Are there classmates this student is having difficulty getting along with in specific conditions?
- Are there tasks and activities this student is having difficulty moving from or to?
- Are there classes/activities the student is having difficulty attending/being on time to?
- As you think about the start of the day to the end, are there any other expectations the student has difficulty reliably meeting or that you find yourself frequently reminding the child about?

☐ List unsolved problems here:
(or on a separate sheet)

HOME/CLINIC PROMPTS

- Are there chores/tasks/activities the child is having difficulty completing or getting started on?
- Are there siblings/other children the child is having difficulty getting along with in specific conditions?
- Are there aspects of hygiene the child is having difficulty completing?
- Are there activities the child is having difficulty ending or tasks the child is having difficulty moving on to?
- As you think about the start of the day to the end, are there any other expectations the child has difficulty reliably meeting or that you find yourself frequently reminding the child about?

Options for Handling Unsolved Problems



**Plan
A**

Solve the problem
unilaterally



**Plan
B**

Solve the problem
collaboratively



**Plan
C**

Put the
expectation on
hold for now

Plan B

Solve the Problem Collaboratively

1. Empathy Step

- Gather information from the child about what's hard about meeting the expectation.

2. Define Adult Concerns Step

- Identify adult concerns.

3. Invitation Step

- Collaborate on a solution that is realistic and mutually satisfactory.

The CPS Model is Evidence-Based

Clinical Child and Family Psychology Review (2019) 22:549–561
<https://doi.org/10.1007/s10567-019-00295-z>

Collaborative & Proactive Solutions (CPS): A Review of Research Findings in Families, Schools, and Treatment Facilities

Ross Greene^{1,2}  · Jennifer Winkler³

Examples of Large-Scale Applications

- **Haninge Kommun (Sweden) School Department**
- **State of Maine Department of Corrections**
- **State of Maine Department of Education**
- **Fairfax, Virginia, Public Schools**
- **State of Washington Office of the Superintendent of Public Instruction (OSPI)**
- **Department of Elementary and Secondary Education (DESE), Commonwealth of Massachusetts**
- **Ireland Disability Services (Adult and Child)**

Additional Information/Resources

Visit us at:

livesinthebalance.org

truecrisisprevention.org

Learn More



WHAT COLLABORATIVE & PROACTIVE SOLUTIONS (CPS) CAN HELP YOU ACHIEVE

"It is possible to envision the day when schools no longer deploy discipline referrals, detentions, suspensions, paddling, restraints, or seclusions. What is required is vision, commitment, a desire to change things for the better for all students and staff, and a willingness to examine and change structures and practices that haven't been working for a very long time. This is a process that many, many schools have already embraced."

Ross W. Greene, Ph.D.
Founding Director,
Lives in the Balance

Collaborative & Proactive Solutions (CPS) is an evidence-based, trauma-informed, neurodiversity-affirming approach to understanding and helping kids with concerning behaviors. The CPS model has been implemented in countless families, schools, inpatient psychiatric units, and residential and juvenile detention facilities, often with dramatic effect: significant improvements in behavior, enhancement of communication and relationships between kids and caregivers, and major reductions or total elimination of punitive, exclusionary disciplinary practices such as restraint, seclusion, and suspension. When caregivers focus on solving problems collaboratively and proactively (rather than modifying the behaviors that are caused by those problems), and on preventing crises rather than managing them, the culture of the school community is enhanced for all its members.

Create A Positive, Nurturing, and Effective Learning Environment:

Imagine this:

- a school culture in which, when students are struggling, caregivers are focused exclusively on the problems that are causing them to struggle rather than on the concerning behaviors that are caused by those problems
- a school culture in which the problem-solving is almost exclusively collaborative rather than unilateral (i.e., students are deeply engaged in solving the problems that are affecting their lives)
- a school culture in which the problem-solving is almost exclusively proactive rather than reactive (de-escalating isn't proactive and isn't a problem-solving strategy)
- a school culture that is focused on meeting all students where they're at

That's a culture that works better for all students...and all educators.

Be Truly Trauma-Informed:

There are four components of trauma-informed care:

- | | |
|--|---|
| ☐ Emotional and physical safety | ☐ Trustworthiness and transparency |
| ☐ Collaboration and mutuality | ☐ Empowerment and choice |

The CPS model checks all the boxes.

Eliminate the Disproportionate Application of Punitive, Exclusionary Disciplinary Practices

As research continues to show punitive and exclusionary discipline practices are being disproportionately applied to Black and Brown students and those with disabilities, many educators and policymakers are striving to move away from the very programs that have fostered that disproportionality. Often they're not sure what to do instead. When caregivers are implementing the CPS model, they're no longer trying to modify behavior through application of punitive, exclusionary disciplinary practices; they're busy solving the problems that are causing those behaviors.

Truly Prevent Crises and Eliminate Restraint and Seclusion

A study released in 2021 documented 79 deaths of kids in the U.S. while being restrained over a period of 26 years. The key to creating safe environments for kids and caregivers is to prevent crises rather than manage them. The CPS model has been shown to reduce or completely eliminate restraint and seclusion in schools and facilities. De-escalation, restraint and seclusion are crisis management strategies. The key to crisis prevention is identifying and solving the problems that are causing kids to become escalated in the first place.

Eliminate Corporal Punishment

As research continues to accumulate documenting the significant long-term emotional and physical harms of corporal punishment, the need to eliminate this practice from schools grows. Even if it didn't cause harm (it does), wasn't an act of aggression (it is), and had positive effects (it doesn't), corporal punishment cannot possibly solve the problems that are causing kids' concerning behavior. When adults start proactively identifying and solving those problems, the need for corporal punishment is eliminated.

Who We Are

Lives in the Balance is a 501(c)(3) nonprofit founded by Dr. Ross Greene that partners with schools to replace punitive discipline with approaches that are preventive, relational, and effective. Using the evidence-based Collaborative and Proactive Solutions (CPS) model, we embed problem-solving and student voice into everyday practice, reducing crises and reliance on restraint and seclusion, while strengthening school climate and culture.

Our Approach to Supporting Schools

Helping kids and educators is our passion. We collaborate with educators to drive schoolwide systems change by focusing "upstream" on prevention rather than perpetually reacting to crises. This involves proactively identifying and solving the unsolved problems that cause concerning behaviors rather than merely trying to modify the behaviors themselves. This is a significant shift, but we have helped countless schools make it happen. **Our model is proven to work at scale.**

- OSPI (Washington): In our partnership with the Washington Office of Superintendent of Public Instruction, we have provided CPS training to over 1,000 WA educators. In 2025, project sites saw a significant decrease in incidents of restraint and isolation.
- MA DESE (Massachusetts): We are currently recipients of a grant from the MA Department of Elementary and Secondary Education to provide educators with strategies to reduce statewide reliance on timeout rooms.

Our work with schools is highly individualized and cost-effective. Our trainers use real work samples and applied practice to build educators' skills and support long-lasting implementation of the CPS model. Our sustainable implementation model includes:

- Foundational Training: Stakeholder-wide, asynchronous training to ensure that key staff members are clear on how to fit CPS into your school's current system of service delivery.
- Implementation Consultation: Virtual consultation sessions to clarify implementation and support leadership teams in aligning CPS with existing student support structures (ex. pre-referral, MTSS systems, and/or IEP-related service delivery).
- Coaching for Practice Change: Coaching sessions using real work samples, the Assessment of Skills and Unsolved Problems (ASUP), and recorded CPS examples to embed problem-solving into everyday practice.

A Note from Our Founder



For a very long time, educators have been trained to *manage* crises. Reactive practices such as de-escalation, restraint, and seclusion occur once a student is *already* becoming agitated and/or exhibiting concerning behavior. These practices occur very late in a sequence of events that begins with an expectation a student is having difficulty meeting.

In other words, concerning behavior is a student's frustration response. The use of restraint and seclusion can be dramatically reduced – sometimes completely eliminated – when we're focused on what the student is frustrated about rather than on trying to modify their frustration responses. We call those unmet expectations "unsolved problems," and they're highly predictable. This means that they can be identified and solved proactively, thereby reducing the need for crisis management.

That's what we've been helping educators do in schools all over the world for a very long time. Our evidence-based model is called Collaborative & Proactive Solutions (CPS), and we can't wait to work alongside you to change things for the better in your building.

-Dr. Ross Greene

A Few of Our Success Stories

Fairfax County Public Schools, Virginia

After partnering with us, the largest school system in Virginia (220 schools) went from thousands of restraints and seclusions a year to dozens.

Regional School Unit 75, Maine

Following implementation of CPS this school system went from hundreds of restraints and seclusions annually to fewer than a dozen.

Resources



Learn

Explore free CPS resources, guides, and videos at www.livesinthebalance.org



Connect

Stay connected by visiting www.livesinthebalance.org/connect



Watch

View our documentaries on restraint and seclusion. Real children, real stories, and a movement for lasting change. <https://livesinthebalance.org/advocacy/public-awareness/>

CHILD'S NAME:

DATE:

NAMES OF CAREGIVERS COMPLETING THIS INSTRUMENT:

STEP 1: SKILLS

Whether neurotypical or neurodivergent, children communicate that they're having difficulty meeting expectations in diverse ways, including through their concerning behavior. This behavior is best conceived as a frustration or stress response, the nature of which is determined by a variety of factors, most especially certain skills related to flexibility/adaptability, frustration tolerance, problem solving, and emotion regulation. Some kids can demonstrate these skills under some conditions but not under other conditions.

This section is aimed at helping caregivers discuss those skills and the degree to which they may be impacting a particular child. Being aware of and considering the skills that may impact a child's capacity to handle life's problems and frustrations and meet various expectations helps caregivers move away from motivational explanations for concerning behavior (e.g. attention-seeking, manipulative, coercive, unmotivated) and toward a more compassionate, accurate understanding of such behavior. Note that these skills are not the primary focal point of intervention in the CPS model; the unsolved problems you'll be identifying in Step 2 will be the "targets" of intervention.

Please check off a skill if it's difficult for the child to access at times and appears to be making it difficult for the child to handle problems and frustrations and/or meet certain expectations:

- | | | |
|---|---|--|
| ☐ Maintain focus | ☐ Consider a range of solutions to problems | ☐ Regulate emotional response to problems and frustrations |
| ☐ Regulate activity level | ☐ Flexibly handle ambiguity, uncertainty | ☐ Empathize with others, appreciate another person's perspective or point of view |
| ☐ Handle transitions, shift from one mindset to another | ☐ Shift from original idea, plan, or solution | ☐ Interoception (ability to understand and feel what's going on inside their body) |
| ☐ Consider the likely outcomes or consequences of actions (impulse control) | ☐ Express concerns, needs, or thoughts in words or other means of communication | ☐ Tolerate and manage the sensory environment |
| ☐ Persist on challenging or tedious tasks | ☐ Understand what is being communicated by others | |
| ☐ Sense of time (time that has passed, time needed) | ☐ Appreciate how their actions affect others | |

STEP 2: UNSOLVED PROBLEMS

Unsolved problems are the specific expectations a child is having difficulty meeting. The wording of an unsolved problem will translate directly into the words that you'll be using when you introduce the unsolved problem to the child when it comes time to solve the problem together. Poorly worded unsolved problems often cause the problem-solving process to deteriorate before it even gets started. Please reference the ASUP Guide for guidance on writing unsolved problems.

SCHOOL/FACILITY PROMPTS

Are there specific tasks/expectations the student is having difficulty completing or getting started on?

Are there classmates this student is having difficulty getting along with in specific conditions?

Are there tasks and activities this student is having difficulty moving from or to?

Are there classes/activities the student is having difficulty attending/being on time to?

As you think about the start of the day to the end, are there any other expectations the student has difficulty reliably meeting or that you find yourself frequently reminding the child about?

HOME/CLINIC PROMPTS

Are there chores/tasks/activities the child is having difficulty completing or getting started on?

Are there siblings/other children the child is having difficulty getting along with in specific conditions?

Are there aspects of hygiene the child is having difficulty completing?

Are there activities the child is having difficulty ending or tasks the child is having difficulty moving on to?

As you think about the start of the day to the end, are there any other expectations the child has difficulty reliably meeting or that you find yourself frequently reminding the child about?

List unsolved problems here:
(or on a separate sheet)