



## K-12 BTAM Case Management



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## Education, Training & Certifications:

- M.Ed, Counselor Education
- Licensed School Counselor
- Postgraduate Professional License (VADOE)
  - School Counselor
  - Admin & Supervision Pre-K-12 Central office
- School Threat Assessment Training (DCJS) – Dr. Gene Deisinger

## Experience:

- Public School Teacher, Coach -- 14 years
- School Counselor/Director – 13 years
- Coordinator of SC Services – 9 yrs CCPS
- Conducted 100's of TA, trained Division staff
- Deisinger Consulting, LLC BTAM Trainer

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## Education, Training & Certifications:

- ED.D., Counseling & School Psychology
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  - School Psychologist
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## Experience:

- School Psychologist – 30 years in schools, 26 yrs in Chesterfield County (CCPS)
- School/Clinical Psychology private practice – 11 years
- Adjunct Instructor – Mary Baldwin College Richmond – 10 years
- Coordinator of Psychological Services – 7 years CCPS
- Conducted 100's of TA, trained Division staff
- Deisinger Consulting, LLC BTAM Trainer

# Attendee Survey

**Who is present today?**

# Agenda

- Introduction and Overview
- Review of Threat Assessment (BTAM) Case Study
- Case Management Rationale and Principles
  - Managing, Monitoring, and Resolving Cases
- Developing the Case Management Plan
- Utilizing Initial and Updated Case Management Forms
- Summary/Q and A

# Enhancing Your Experience!

**Maximize opportunities to enhance your practice to keep the School Community Safe!**

- Contribute to and learn from others
- Build collaborative networks across Virginia
- Introduce yourself and share contact information
- **Commit to a handful of practically achievable actions when you return to work!**

# Threat Assessment and Management Goal

**The primary goal of the threat assessment and management process is to support and enhance the health, safety, and well-being of the school community.**

*Threat Assessment and Management in Virginia K-12 Public Schools:  
Model Policies, Procedures, and Guidelines, 3<sup>rd</sup> Edition (Virginia DCJS, 2020)  
Page 31.*

# BTAM Case Management

## Virginia C.A.R.E.S

**C: Caring and Connection** to build a positive school/campus climate

**A: Awareness** of concerns, resources, and reporting options

**R: Recognition** of, and response to, threatening, aberrant, or concerning behaviors

**E: Engagement** with the community and with persons (within the school or campus) for whom there is concern

**S: Support for all members of the school/campus community**



# What is Concerning or Aberrant Behavior?

## Concerning Behavior:

- Behaviors or communications that cause concern for:
  - The health, safety, or well-being of the subject
  - Their impact on the health, safety, or well-being of others, or...
  - Both!

## Aberrant Behavior:

- Behaviors or communications that are **unusual or atypical** for the person or situation, and that *cause concern* for the health, safety or well-being of the subject, others, or both.



### For further consideration:

- Do all aberrant or atypical behaviors cause concern?
- Do various groups in the community view behaviors differently?

# Principles of Threat Assessment

**BTAM takes a Holistic approach to assessment and management**

- Targeted violence stems from an interaction among:

**S**ubject(s),

**T**arget(s),

**E**nvironment and

**P**recipitating events

## STEP© Framework

© Deisinger (1996);  
Deisinger and Nolan (2021)



# Classifying/Prioritizing Cases

**Priority 1: Critical Level of Concern/Imminent** – Subject poses an **imminent** threat of serious violence or harm to self/others. Has or may reasonably have significant impact on others. Requires immediate law enforcement and school administration notification, subject containment, target protection and safety planning. Implementation of crisis response and notification protocols. Ongoing assessment and management plan, and active monitoring.

**Priority 2: High Level of Concern** – Subject poses, or is **rapidly developing** capability for, a threat of serious violence or harm to self or others; or is in urgent need of hospitalization or treatment, Targets/others are impacted. Typically involves environmental factors and consideration for precipitating events. Requires immediate notification of school administration and law enforcement, subject containment, target protection and safety plan. Activation of crisis response protocols, ongoing assessment and management plan, active monitoring and referrals.

# Classifying/Prioritizing Threats

**Priority 3: Moderate Level of Concern** – Subject does not pose a threat of serious violence or harm though risk cannot be ruled-out. Subject may be developing capability for harm and is engaging in aberrant or concerning behaviors that indicate need for assistance/intervention. Targets/others likely concerned and impacted. Environmental or precipitating factors may be present. Requires ongoing assessment and management plan, active monitoring, and referrals as appropriate.

**Priority 4: Low Level of Concern** – Subject does not indicate a threat of violence or harm to self or others; would or may **benefit from intervention or assistance** with concerns, Target, environmental or precipitating events may be present at low levels. May involve some ongoing assessment management with passive monitoring and/or periodic active monitoring, Referrals as appropriate. Close case if no team interventions or monitoring indicated.

**Priority 5: Routine/No Known Concerns** – Subject does not indicate a threat of violence or harm to self or others; or need for assistance or intervention. No impact on others, environmental factors, or precipitants that need team intervention. Close case.

# Case Introduction : Kevin

## “I’m Really Worried About Him!”

Gina, a 12<sup>th</sup> grade student at Millwood High School, stopped by to see Ms. Cassidy, her school counselor. Ms. Cassidy recognized immediately that Gina was upset and asked her what was wrong. Gina told her, “It’s my friend Kevin... he’s really depressed and angry and things are getting worse. He showed me his journal this morning and it’s filled with all these sad poems and drawings... and I am just really worried, and I don’t know what to do !?... I’m afraid he’s going to do something!”

# Case Scenario : Kevin

Read the “Case Summary: Key Information”

**Discuss the following:**

- **In the Initial Report - Is there Evidence of Aberrant or Concerning Behavior ? If so, describe.**
- **What are the S.T.E.P. (Subject, Target(s), Environment, Participating Events) domain concerns?**

# Case Scenario : Kevin

Return to your teams and discuss the following:

- What level of priority would you assign to the case at this time?
- What concerns and needs are seen in Kevin's case that could be included in a case management plan ?

# Case Scenario : Threat Priority

**Based on the current information you have reviewed, what is the threat priority?**

Priority 1: Critical/Imminent

Priority 2: High

Priority 3: Moderate

Priority 4: Low

Priority 5: Routine/No Known Concerns at this time



# The WHAT of Managing, Monitoring, and Resolving Cases

The Threat Assessment Team **shall** assist individuals within the school who engaged in concerning, aberrant or threatening behavior or communication, and any impacted staff or students, in accessing appropriate school and community-based resources for support and/or further intervention.

(Model Policies, p. 24)

# Managing, Monitoring, and Resolving Cases

Following the completion of a Threat Assessment, how is this Case Management requirement implemented **in your district or school**?

1. Does implementation receive the full attention and support of the TA Team? Of the School Administration? Of the District?
2. Does this implementation change due to the degree of threat level? If so, how?
3. Does this implementation change if the subject(s) of concern is/are suspended or expelled from school? If so, how?
4. Does this implementation change given the quantity and quality of resources available to the BTAM Team? If so, how?

# The **HOW** of Developing a Case Management Plan

**Develop an individualized, contextually-relevant plan based on inquiry and assessment.**

- The Management Plan must be contextually relevant and situationally specific (i.e., based on case priority level, STEP needs)
- Use the STEP framework to guide plan development
- Accountability with case managers is critical
- Rely on individuals trusted by the Subject and Target in the development and implementation of the plan
- The personalities, backgrounds and skills of threat case managers can make a difference in outcomes!



Source: Deisinger (1996); Deisinger and Nolan (2021)

# Develop a Case Management Plan

Targeted violence stems from an interaction among



**These 4 domains are also used to organize and implement a Case Management Plan.**

# Develop a Case Management Plan

**Subject(s) Strategies** – De-escalate, assist, refer, contain, and/or control the individual(s) who may take violent action; or otherwise indicate a need for assistance or intervention

**Target(s) Strategies** – Decrease vulnerabilities and provide support for the target(s)

**Environmental Strategies** – Address school climate/culture, and systems (policies, procedures, practices) to minimize impact, escalation or recurrence

**Precipitating event(s) Strategies** – Prepare for and mitigate against current and future stressors that may trigger adverse reactions.

# Initial Case Management Plan

- Allows Team to comprehensively consider the Needs and Concerns of the case
- Leads to specific STEP-related strategies
- Requires Team to determine with whom the Management Plan is shared
- Prompts the Team to review and update the initial strategies periodically and systemically

Subject's Full Name:		Grade Level:	
<b>PART IV: INITIAL CASE MANAGEMENT PLAN</b>			
Current Identified Needs (based on Threat Assessment determination, including re-entry transition needs):			
Current Concerns (based on Threat Assessment determination, including re-entry transition concerns):			
Known/Anticipated Re-entry Date (if applicable):			
<b>PLANNING "STEPS"</b>		<b>RESPONSIBLE PERSON</b>	<b>Date Goal Achieved</b>
Subject Need Timeframe for Completion	Strategy(ies) to Address Need		
Target Need Need	Strategy(ies) to Address Timeframe for Completion		
Environmental Need Need	Strategy(ies) to Address Timeframe for Completion		

# Case Scenario: Current Needs/Concerns

- **The Subject (Kevin) was determined by the team to be at a High Level of Concern**
- **Examples of the following Needs/Concerns were identified:**
  - **Subject: Kevin**
    - Concern re Suicidal and Homicidal Ideation
    - Concern about possible depression/anxiety disorder
    - Concern about poor academic performance of late
    - Concern about making and keeping friends at school
    - Need to address bullying in school
    - Need to secure firearms access in home

# Case Scenario: Current Needs/Concerns

- **Examples of the following Needs/Concerns were identified:**
  - **Target :** Bobby, Jamal, Thomas, Kevin, Sara?, Gina?, Whole School?
    - Need to feel safe from harm and intimidation
    - Need to address any trauma stemming from threats
    - Need to address bullying by the boys in math class
    - Concern on how to reduce vulnerabilities
  - **Environment :**
    - Need to evaluate effectiveness of the school bullying prevention programs
    - Need to address lack of intervention with bullying: Mrs. Thomas
    - Need to improve stakeholder reporting of concerning/aberrant behaviors: Mrs. Thomas and Ms. Sadine
    - Concern re potential for lack of mental health support services in community and/or school



# Case Scenario: Current Needs/Concerns

- **Examples of the following Needs/Concerns were identified:**
  - **Precipitating Events :**
    - Need to consider Kevin's response to any discipline administered as a result of his actions and his response to the implementation of a management plan
    - Need to plan for Kevin's return to school should he be suspended.
    - Concern regarding father's response to school's actions taken against Kevin
    - Concern about peer social media responses to Kevin's posted memes

# Subject-Based Strategies

## Implement appropriate strategies: Options

- No further action
- Direct monitoring: observe and respond
- Direct intervention
  - Behavioral
  - Skill Building
  - Mental Health Support
- Administrative actions/Discipline
  - Warning/Letter of apology
  - Detention/Suspension/Expulsion
  - Direct Threat Standard
- Criminal justice interventions

Adapted from: Calhoun and Weston (2003) *Contemporary Threat Management*

# Subject-Based Strategies: Direct Intervention *Considerations*

Strategies should address:

- immediate safety concerns presented by the subject
- the underlying issues that contribute to increased risk of harm to self and/or others.

The focus of these strategies are:

- to de-escalate, contain, and/or control the subject away from plans and preparation for violence
- toward engaging with others, problem solving, adapting, and improving their coping skills and well-being.

These strategies will generally fall across three categories:

- behavioral
- skill-building
- mental health support.

# Examples: Subject-Based Strategies

## **Behavioral:**

- Reduce access to identified target(s)
- Establish and enforce reasonable behavioral norms and expectations in school, home and community – formal (BIP) or informal plans
- Implement Differential Reinforcement Strategies

## **Skill-building:**

- Problem-solving
- Self-advocacy
- Conflict Resolution

## **Mental Health Supports:**

- School and/or community Counseling (to focus on triggers, agitators and prosocial response)
- Adult mentor (to build a trusting relationship)

**Source: Deisinger (1996); Deisinger and Nolan (2020)**

# Subject-Based Strategies

Subject-Based strategies will generally fall across three categories:

- behavioral strategies
- skill-building
- mental health support.

## Activity:

- In small groups identify YOUR school, district, and/or community, supports to address the previously identified needs/concerns available to the Subject (Kevin):
  - behavioral strategies
  - skill-building strategies
  - mental health supports

# Considerations Regarding Subject Removal

**Leave, suspension, or termination options that focus solely on removing the subject of concern do not address the long-term challenges of:**

- Moving subject away from thoughts and plans of, and capacity for, violence and/or disruption
- Connecting subject to resources (where needed)
- Mitigating environmental/systemic factors
- Monitoring subject when they are no longer connected to organization

**Use with intentionality, awareness of limitations, and anticipation of consequences.**

Source: Deisinger (1996); Deisinger and Nolan (2020)

# Subject-Based Strategies: Re-Entry Planning and Preparation

## Prepare for re-integration of subject:

- **Establish conditions for return**
  - Evaluate subject's readiness to safely and effectively return to participate in the full school experience
- **Develop a proactive set of strategies within the initial or case update management plan**
  - Align ongoing interventions
  - Coach subject about re-entry
  - Anticipate environmental aspects which may impact subject
  - Prepare the school community for subject's re-entry
  - Consider precipitating events
- **Monitor, re-assess and intervene as appropriate**

# Target-Based Strategies Considerations

Strategies should address:

- Decreasing vulnerabilities of harm from the Subject
- Providing support for prior harm.

The focus of these strategies are:

- to minimize risk and negative impact on the target(s)
- to help the target(s) cope with emotional harm and increase their safety.



# Examples: Target-Based Strategies

- **To minimize risk and negative impact**
  - Minimize public information about the threat to protect target
  - Monitor communications for changes/escalations by subject
  - Change class schedule or school placement if necessary
- **To help the target cope with emotional harm**
  - Utilize school and community support systems
  - Provide coaching to target re personal safety approaches
  - Engage with Target – have a team member assigned as a point of contact for support

Source: Deisinger (1996); Deisinger and Nolan (2020)

# Target-Based Strategies

The focus of these strategies are:

- to minimize risk and negative impact on the target(s)
- to help the target cope with emotional harm and increase their safety

## Activity:

- In small groups identify **YOUR** school, district, and/or community, supports to address the previously identified needs/concerns of the **Targets (Bobby/Thomas/Jamal, Sara, Gina):**
  - Negative impact strategies
  - Cope with emotional harm and increase their safety

# Environment/Systemic-Based Strategies Considerations

Strategies should address:

- A holistic view of the situation, monitoring for systemic contributing factors in the school and/or community.

The focus of these strategies are not just on the Subject and Target, but also on:

- **School**
  - Policies, Procedures, Practices
  - Physical Plant
  - Climate
- **Other individual(s)** and/or groups that support violent behavior
  - Associates of the subjects
  - School groups that may seek to exploit opportunities to engage in violent acts

# Examples: Environment-Based Strategies

- **School**
  - Policies, Procedures, Practices
    - Consider how inflexible school procedures may impact ways to best manage threat cases
      - Ex: prohibition on school class changes after Labor Day
    - Identify/address BTAM reporting gaps/delays
- **Physical Plant**
  - Consider how the design of the school promotes or challenges school safety

Source: Deisinger (1996); FBI (2004); Deisinger and Nolan (2020)

# Examples: Environment (Con't)

- **Climate**
  - Review school/workplace climate – build and support a caring community
  - Implement or enhance bullying prevention/intervention programs
- **Other individual(s)** and/or groups that support violent behavior
  - Monitor behaviors and actions of the Subject's friends and family to determine if Target(s) are impacted or violence is being promoted

# Environment/Systemic-Based Strategies

The focus of these strategies are:

- Focused on school, community, other individual(s) and/or group behaviors, not just that of the subject or target

## Activity:

- In small groups identify YOUR school, district, and/or community's supports available to address Environmental/Systemic factors contributing to this case (e.g., Need to evaluate effectiveness of the school bullying prevention programs)

# Precipitating Events-Based Strategies

Strategies should address:

- An ongoing, long-term approach to anticipating, monitoring for, and (to the extent possible) managing the impact of potential precipitating events.

**The focus of these strategies are on the:**

- subject
- school/community incidents

# Examples: Precipitating Events-Based Strategies

## Anticipate and prepare for Precipitating Events or “Stressors”

- Subject
  - Reactions to case management/strategies
  - Key dates or events, including anniversaries
- School/community incidents
  - Contagion effects of high profile or locally significant acts of violence

Source: Deisinger (1996); Deisinger and Nolan (2020)



# Precipitating Events-Based Strategies

The focus of these strategies are:

- An ongoing, long-term approach to anticipating, monitoring for, and (to the extent possible) managing the impact of potential precipitating events

## Activity:

- In small groups identify YOUR school, district, and/or community's supports available to the address **Precipitating Events Concerns(s)** in this case:
  - Consider potential stressors in the subject's life that may serve as a precipitating events (**e.g.**, Need to consider Kevin's response to any discipline administered as a result of his actions and his response to the implementation of a management plan)

# Case Update & Revised Management Plan

- Case Update form uses STEP framework
- Reviews prior Strategies
- Includes Case updates and the source of the update
- Modifies the Initial plan with new Strategies, person responsible & date due
- Can also be used to define the terms of the subject's re-entry

Subject's Full Name:		Grade Level:	
<b>PART V: CASE UPDATE (to be updated regularly while the case is active)</b>			
<b>STRATEGY/TASK</b>			
<b>Subject Strategy(ies)</b>			
Update/Concerns as a result of the Initial Plan:		Source	
Strategy(ies)	(Continuing and/or new)	Responsible Person	DUE
<b>Target Strategy(ies)</b>			
Update/Concerns as a result of the Initial Plan:		Source	
Strategy(ies)	(Continuing and/or new)	Responsible Person	Due

# Review of Participant Handout: Action Steps

Given the information discussed, share one or more practically achievable actions steps you and your team members could implement related to TA Case Management!



# Summary

- Virginia law requires threat assessment teams not only to assess threats but also to *manage* cases to ensure all parties involved have their needs and concerns considered, and the safety of the school community assured
- STEP© allows threat assessment teams to approach case management in a coherent, holistic way
- Case Management requires teams to access school and community-based resources to assist with the support and/or intervention of all members of the school/campus community
- The Case Management plans prompt the team to review and update the initial strategies periodically and systemically
- Removal of the subject from the school/campus should be done with discretion and requires the terms of subject's re-entry to be considered in either the Initial or Updated Case Management plan
- Consult with DCJS/VCSCS, colleagues, and threat assessment experts regarding questions/concerns about the process.

Questions?



# Resources and Contact Information

## DCJS Virginia Center for School and Campus Safety [K-12 Resources, Training and Points of Contact](#)

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