



Student Assistance Team (SAT) Planning Template

Team Roles and Information:

NAME	ROLE	EMAIL/PHONE

Meeting Location:

- ✓ Consistent/regular meeting space
- ✓ Space to accommodate all members
- ✓ Access to telephone, projector, or other necessary equipment

Notes/Details:

Day/Time of Meeting:

- ✓ Recommend 40-60 minutes/week (sufficient to complete Student Assistance Program work including regular Student Support Team meetings and monthly Case Management meetings)
- ✓ Flexible time scheduled for SAP case management/intervention activities
- ✓ Meeting day/time works for all SAT members
- ✓ Establish guidelines for attendance



Notes/Details:

Meeting Organization:

- ✓ Come to meetings focused and prepared with necessary documentation
- ✓ Review of student plans regularly
- ✓ Clear SAP case assignment and management procedures
- ✓ Document relevant meeting information, attendance, confidentiality agreements, and student referrals
- ✓ Allow relationship building time before and after meetings

Notes/Details:

Types of Meetings

	Student Support SAT	Case Management SAT
Purpose	Plan support for student concerns (may also be referred to as a problem-solving meeting)	Review schoolwide data, review and monitor individual supports, plan activities, and monitor team functioning
Members	SAT members and invite relevant stakeholders (e.g., caregiver, student, teacher, counselor)	SAT members and agency liaison(s)
Suggested Frequency	Schedule weekly except for weeks with Case Management meetings	Schedule at least monthly
Process	Use a structured process to identify and analyze the concern and plan interventions and supports (see example template)	Use structured process to review new referrals, review prior referrals and SAP case management tasks, receive an update from the agency liaison(s) and resolve any barriers to referrals, and update on other business (see example template)