

2/27/17 2:14 PM

**\*APPLICATION DEADLINE: Monday, March 6, 2017 at 5:00 pm**  
**Email to elizabeth\_ascoli@psbma.org**  
**Mail or hand-deliver to BEF, 40 Webster Place, Brookline, MA 02445**

**BROOKLINE EDUCATION FOUNDATION**  
**Collaborative Grant Application for 2017-2018 Academic Year**  
**Cover Page**

**APPLICATION MUST BE TYPED**

Project Title	<b>Educate 2 B: Tools for Engaged Learning &amp; Living - Movement, Breath, &amp; Mindfulness</b>
Who is the Project Leader?	Merrill Forman
Leader's School/Assignment	Brookline Early Education Program/Occupational Therapist
Leader's Home Telephone Number	617-510-1744
Leader's Email Address	merrill_forman@psbma.org
Years teaching in PSB, total years teaching	29 years in Public Schools of Brookline
Project period	Date of training during 2017-2018 school year to be determined by Allison Morgan (presenter) and PSB occupational therapy department, with individual school follow up presentations scheduled by school teams. All work completed by May 2018.
Amount requested	\$6000.00

I understand that, should the Brookline Education Foundation fund this Collaborative Grant application, as Project Leader, I am obligated to submit a written evaluation of this project at its completion and to present the results of my grant at a BEF-sponsored event. Evaluations of projects will be due by May 31, 2018. I further understand that only educators employed by the Brookline Public Schools at the time the project is undertaken are eligible to receive funds.

Acknowledgement of Project Leader: Merrill Forman

Date: 3/5/2017

For online submissions, please acknowledge that you have read and agreed to the above statement.  X

BROOKLINE EDUCATION FOUNDATION  
Collaborative Grant Application for 2017-2018 Academic Year  
**Project Description Section**

**1. Project Summary** (1-3 sentences)

Twenty-five participants (multidisciplinary Pre-K through high school teams consisting of an occupational therapist and an additional educator from their school/program, plus the grant's administrative coordinator) will attend a day long training to learn 30 evidence based self regulation techniques (movement, breath work, mindfulness activities) to use in classrooms and during therapy. These activities are designed to foster learning by addressing students' physiology, supporting their ability to calm/stay focused, activating neurological pathways to prime the brain for learning, and changing mindsets towards positive, growth-centered approaches for behavior management. After the workshop, each school team will share what they've learned with other PSB educators within their respective buildings via in-service presentations. In addition, grant participants will meet 3-4 times throughout the 2017-2018 school year to reflect on and evaluate the efficacy of the program at the building level and to problem solve strategies to facilitate improved implementation.

**2. Need**

Why is this project needed?

In recent years with the increase of behavioral, developmental, and learning challenges associated with internal and environmental stress, schools have been addressing the need for self-regulatory techniques in the classroom to help students manage school demands and facilitate learning. "Research has shown that a student's academic achievement in the classroom, future success in life and overall happiness can be significantly impacted by attainment of 3 skills: self regulation (ability to attain, maintain and change arousal levels appropriately), focus (ability to direct attention and manage distractions) and resilience (ability to adapt and thrive despite adversity and challenges)" ([www.zensationalkids.com](http://www.zensationalkids.com)). At every grade level, from pre-kindergarten at the Brookline Early Education Program, in many of our elementary schools, and at Brookline High School, self regulation programs such as the Zones of Regulation have been successfully implemented to provide students with common language and techniques for recognizing and addressing their self-regulatory challenges. While implementation of the "Zones" has provided educators with a common language and theoretical framework to discuss self-regulation, there is still a need for access to concrete and evidenced-based strategies that can be implemented to support this framework. Educators frequently request quick and easy-to-implement techniques to use in classrooms to facilitate the creation of a calm, productive, supportive learning environment. The **Educate 2 B** program will provide educators with a new set of 30 quick evidence-based tools that will support their students' self-regulatory needs in the classroom, including the ability to stay calm, become energized, focus, connect and be ready to learn by helping to reduce stress, balance energy levels and develop healthy mind/body habits thus creating calm and organized learning settings. These tools will dovetail with and complement programs already in place (i.e. Zones of Regulation) by providing additional tools for teachers. Additionally, this particular training explains research-based evidence linking the principles of neurophysiology and biological underpinnings in order to support our better understanding of these self-regulation techniques thus facilitating more effective explanation to others and implementation.

### 3. Personnel

a. In addition to the project leader, who are the participants in this grant? Please include *names, schools, assignments, and email addresses*.

Jennifer Baum, Heath School, Occupational Therapist, jennifer\_baum@psbma.org  
MaryAnn Biele, Lincoln School, Occupational Therapist, maryann\_biele@psbma.org  
Deborah Caruso, Lawrence School, Occupational Therapist, deborah\_caruso@psbma.org  
Charlotte Craig, BEEP, Occupational Therapist, charlotte\_craig@psbma.org  
Emily Frank, Pre-K-8 Director of Special Education, emily\_frank@psbma.org  
Annie Harutunian, Driscoll School, Occupational Therapist, annie\_harutunian@psbma.org  
Jocelyn Hesse, BEEP, Occupational Therapist, jocelyn\_hesse@psbma.org  
Erin McQuaid, Pierce School, Occupational Therapist, erin\_mcquaid@psbma.org  
Anne Osberger, Baker School, Occupational Therapist, anne\_osberger@psbma.org  
Joanne Pascar, Devotion School, Occupational Therapist, joanne\_pascar@psbma.org  
Kate Siegel, Brookline High School, Occupational Therapist, kate\_siegel-melcher@psbma.org  
Leslie Turner, Runkle School, Occupational Therapist, leslie\_turner@psbma.org

\*\*\*Plus 12 additional Public School of Brookline educators to be determined. Each occupational therapist will work with a building colleague to form a training team by learning the workshop content and techniques and then providing training sessions for the staff at their respective buildings with the goal of training all interested PSB special educators and teachers in these evidence based movement, mindfulness and stress reduction techniques. Additional participants may include a classroom teacher, principal, team facilitator, speech and language pathologist, psychologist, behavior analysts, physical therapist or a social worker.

b. What administrator/principal/headmaster/curriculum coordinator is responsible and accountable for project activities?

Emily Frank, Pre-K-8 Director of Special Education. Emily has met with the project leader and was excited to steer this project as its administrator. In addition, Emily shared the grant proposal with Sam Zimmerman, Deputy Superintendent of Student Services, who was enthusiastic about the grant proposal as well.

c. Will the project require additional personnel or reassignment of current staff?

No. This project will not require additional personnel or reassignment of current staff.

### 4. Goal Statement

What are the explicit goals for the project?

Upon completion, occupational therapists and their building partners will:

- Be taught by Allison Morgan, MA, OTR, RYT an accomplished occupational therapist, yoga teacher, lecturer, trainer, author, researcher
- Learn 30 evidence based breath, movement and mindfulness activities that can be incorporated into classroom and therapy environments and the curriculum
- Understand the research and science behind each technique
- Understand the relationship between neurophysiology and self-regulatory techniques
- Identify tools to support student's sensory, emotional, behavioral, physical development in school
- Identify stress reduction techniques that can increase educator effectiveness
- Better understand how supporting a child's ability to be calm, organized, focused and connected will result in improved learning
- Provide training to additional Public School of Brookline educators
- Have the ability to create a common thread of knowledge for facilitating self-regulation in both regular education and special education classrooms, that begins in pre-K and continues through high school

## 5. Context

What are the experiences of the participants (inside and/or outside the classroom) that have led you to apply for this grant?

Occupational therapists have been in the forefront of providing consultation around self-regulation in the classroom, for regular education as well as special education students, to optimize learning and help reduce challenging behaviors. With the influx of research focused on the impact of stress on learning and the use of movement and mindfulness techniques, our services are being sought out in even greater numbers. Several years ago two of the PSB occupational therapists were part of a system wide Special Education SPIRAL initiative (led by Emily Frank) that examined the impact of self-regulation on learning. This group represented educators from Pre-K through high school and every discipline including classroom teachers, speech and language pathologists, psychologists, behaviorists, team facilitators and social workers. One of the findings of this group was that no single discipline is responsible for addressing issues and challenges of self-regulation. Occupational therapists, however, with their knowledge and training in human development, neurology, and sensory processing, have a unique skill set to markedly contribute to this conversation and to optimally support our students. As occupational therapists, all educators (special and general education) in our programs and schools rely on our skills and expertise to help them with classroom programming, addressing individual student's needs and self-regulation management. This program, **Educate 2 B**, would help us form multidisciplinary pairings to provide cutting edge training to our school teams, and give us the knowledge to explain the science and research behind their effectiveness. While there are many training on movement and mindfulness, what makes this program unique is the explanation of the underlying science and research behind each technique.

## 6. Project Description

a. Describe the structure of this grant: what is your time frame, when and where will you be working, with whom will you work? You may include copies of supporting material (e.g., conference brochure, tour itinerary). Links to websites may be used for supporting materials and are preferred, if available.

Multidisciplinary building/program teams consisting of an occupational therapist and an additional educator will attend the one-day training, learning 30 evidence based techniques for improving student participation, learning, and behavior management. After the training, participants will bring this information back to their respective buildings, providing in-service presentations to staff, focused on teaching the classroom techniques learned at the training workshop (Training the Trainer model). The project will be ongoing through educator collaboration and daily work with students. The workshop and subsequent in-service presentations will occur during the 2017-2018 school year with the specific workshop date to be determined by the presenter, Allison Morgan, the PSB Occupational Therapy department, and with the approval of the special education administration.\*\* We will aim to schedule the training for the fall of 2017 so that building-based, in-service presentations could then occur in the winter, allowing time for data collection on program efficacy in the classrooms for the remainder of the school year. Location of the workshop will be determined, most likely taking place at Town Hall where we have held previous daylong professional development programs.

\*\*Each year the Occupational Therapists are granted a one day Professional Development release day by the Special Education Department beyond the school wide Professional Development Day.

Allison Morgan's website describes the **Educate 2 B** program in more detail, [www.zensationalkids.com](http://www.zensationalkids.com)

b. Tell us about the collaborative aspect of this grant.

Our goal is to create multidisciplinary Pre-K-high school teams consisting of the each building's occupational therapist and an additional building educator. The participants will work together during the initial workshop and then as building based teams train and act as a resource to each school's personnel. As stated above, each participant team will share the techniques learned through building-based in-services. Additionally, the school teams will continue to work with educators to help them implement the learned strategies and techniques on an ongoing basis. Classroom observations and teacher questionnaires will help guide this support. Grant participants will meet 3-4 times after the training to collaboratively reflect on and evaluate the efficacy of program implementation at the building level and to problem solve as needed.

## 7. Impact and Evaluation

a. Describe as specifically as possible the impact of the work you propose:

- On Yourself - How do you expect this project will change you as educators? How might this work impact future professional activities?

This project will increase our knowledge base on techniques to support self regulation. The workshop's evidenced-based focus and emphasis on linking strategies to the underlying neurological foundations of self-regulation will allow attendees to better understand and then explain and discuss concepts related to self-regulation more effectively with school staff and parents.

In addition, the tools from our workshop can be applied to our own lives as educators. We can practice these skills to help with our own stress-reduction and self-awareness.

- On Your Colleagues - What impact will your project have on your professional community either directly or indirectly?

The number of participants funded by this proposal, and the fact that all PSB programs from Pre-K through high school will be represented, will build capacity for this instructional approach and allow for dissemination of the information learned system-wide. Currently, there is disparity in the system with regard to educators' foundational understanding of the physiological basis of stress and self-regulation, as well as their familiarity and comfort levels in implementing appropriate self-regulation techniques with their students. This project will allow us to work more seamlessly, consistently, and fluidly address students across grade levels, from Pre-K through high school. The collaborative nature of this project will foster a transdisciplinary approach to helping students manage and maintain self-regulation across settings.

- On Your Students - How will your students benefit from this project in the short or long term?

Our students will benefit from an increased repertoire of strategies for self regulation, which will be familiar at all grade levels. When students are equipped to effectively manage internal states of being, it makes them more available for learning. Each building pair of educators are committed to sharing the techniques with their colleagues, thus widening the impact of the workshop across all grade levels and ages. In the short term, more students will be ready for learning after participating in a specific activity in their classroom. In the long term, students will increase self awareness and be able to recall and implement the strategies that optimize their focus and regulation.

b. How will you evaluate the success of this project?

**Pre-Project:**

Occupational therapist will send out questionnaires to their respective building educators to determine what classroom movement, breathwork and mindfulness activities they already use, the results they achieve with these breaks, and their understanding of the science behind the activities.

**Post-Project and Inservices:**

Occupational therapists will again send out building questionnaires at approximately 2 months and then at approximately 6 months after the building based trainings to determine whether educators are using these new techniques regularly, the results they have achieved (using a data collection system), their understanding of why the techniques work and which techniques they have found most effective.

Observation forms and data collection sheets will be created by the occupational therapists with input and consultation from our behavior analysts. Grant participants will meet 3-4 subsequent times to plan inservices, design questionnaires, share data and impressions from each building and formulate strategies to improve efficacy (if necessary).

**8. Dissemination**

How will you share your learning with others in your school and district community? For instance, will you share results in departmental meetings or on departmental wikis, or design other forms of dissemination of your project?

We will share our new knowledge through building-based in-service programs for both special educators and general education teachers, as well as through ongoing support for implementation of techniques in the classrooms. We would also be available to share our learning with parents upon request.

**9. Multi-year projects**

If this application is part of a multi-year project, please put this application in context (to be completed only when applying for a second year of funding).

This is a one-year project.

a. Please evaluate the first year of your grant (see the evaluation form here: [add link])

n/a

b. How does this year build on what was accomplished in the preceding year?

n/a

c. What are the plans and anticipated budget for next year?

n/a

**BROOKLINE EDUCATION FOUNDATION**  
 Collaborative Grant Application for 2017-2018 Academic Year  
**Budget and Finances Section**

Please provide a **detailed budget**. Be as specific as possible.

Expense	Purpose	Cost
Stipends (\$30 per hour per participant)		
Consultant (Include name and location)	Allison Morgan, MA, OTR, RYT Occupational Therapist & Yoga Teacher Zensational Kids 26 Highland Road Montvale, New Jersey 07645	\$5500 (includes presenter's fee and all materials)*
Materials and Supplies	128 page fully illustrated manual 1 manual for each participant	Included in the cost above
Travel and Accommodations*	Transportation, one night lodging, food for presenter	\$500.00*
Conference Fee		
Other		
Substitutes **(please indicate days/hours needed)		
<b>TOTAL</b>		<b>\$6000*</b> These costs were provided by Allison Morgan via email.

\* **Single rooms are acceptable if preferred by the applicant.**

\*\***The BEF's ability to pay for subs is limited; requests will be considered on a case-by-case basis.**

**Finances**

a. Will there be additional funding from other sources? Please describe.

No other funding is available.

b. Are resources needed to continue the work of the project after BEF funding ends? If yes, please describe how these resources will be obtained. If no, please describe how the work of the project will be funded or continued after completion of funding by the BEF.

No additional resources would be needed. After the training, individual school teams would schedule their school in-services on their own.

d. Will you be able to complete the project if only partial funding is available? \_\_\_Yes \_\_\_X\_No

If only partial funding is available, would you be able to redesign the project? \_\_\_Yes \_\_\_X\_No

Please explain:

This project is fully dependent on the one-day workshop presentation by Allison Morgan.

---

Dear BEF Grant Reviewers,

Thank you so much for considering our grant application. We are excited about the prospect of bringing this dynamic presentation and its useful tools to Public Schools of Brookline educators. We believe this grant fully aligns with PSB Core Values and Goals. It facilitates *Educational Equity* by supporting those students who may otherwise be identified as having behavior problems when in fact they may simply need support around self regulation. It also supports students who may have stressful home lives by providing them with easy tools to stay calm and in control in any environment without the need for special equipment or a teacher. This program also supports the core belief in the *High Achievement for All* by helping students and educators have the tools to better manage the myriad of expectations and demands on any given day, by building in programming to develop the skills to effectively multitask and organize oneself with greater efficiency and ease. The *Collaboration* involved in this grant proposal reaches all school and grade levels from Pre-K through high school and will involve the occupational therapist as well as their building partners allowing every participant to grow professionally, enhance student learning and refine our practices.

As stated on the program website, [www.zensationalkids.com](http://www.zensationalkids.com):

*“Our programs focus on helping you establish a culture of well-being, where every individual thrives. We believe this creates an environment where students and faculty feel safe, strong and successful.”*

Sincerely,

Occupational Therapy Department  
Public Schools of Brookline