

**TECHNICAL ASSISTANCE DOCUMENT
FOR NONDISCRIMINATORY
ASSESSMENT OF CULTURALLY AND
LINGUISTICALLY DIVERSE SCHOOL-
AGE STUDENTS**

**The New Mexico Department of Education
2001**

New Mexico State Board of Education

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NONDISCRIMINATORY ASSESSMENT OF CULTURALLY AND LINGUISTICALLY DIVERSE SCHOOL-AGE STUDENTS

The Individuals with Disabilities Education Act (IDEA) has dictated that Nondiscriminatory Assessment be conducted with students in consideration for Special Education services. The Standards for Educational and Psychological testing (American Psychological Association, 1985), and the Diagnostic and Statistical Measurement Manual-IV (DSM-IV; American Psychiatric Association, 1994) each reference the need for assessment of cultural and linguistic factors before diagnosing individuals. Yet the research shows that approximately 5 million individuals are inappropriately assessed each year (Padilla, 2001; Torres, 1991).

Evaluation of culturally and linguistically diverse (CLD) school children has come a long way since the 1930s, when George I. Sánchez began criticizing the inappropriate assessment of monolingual Mexican American students in English (Sánchez, 1932a, 1932b). Yet, IDEA and the other “guides” for evaluating individuals lack specifics as to how to conduct a true nondiscriminatory evaluation. The following is an attempt to interpret what it means to assess culture and language and utilize these factors in making appropriate interpretations and ultimately effective educational recommendations.

This Technical Assistance (TA) document will not provide a recipe approach to the assessment of CLD students, as there are no specific measures to fit a specific case. However, the goal is to provide strategies that can be utilized, regardless of the student’s race, ethnicity, or language.

Understanding Culture and Acculturation

When introducing a concept such as culture, we must first review the concept of worldview. World view, “is taking into account an individual’s social, economic, political climate, their family influences, personal

characteristics, experiences, gender, sexuality, cultural background, and spirituality” (Flores, López, De Leon, 2000, p. 8; i.e., Ibrahim & Kahn, 1987; Sue, Ivey, & Pedersen, 1996). If evaluators are not aware or lack sensitivity, experience, and training to adequately account for the cultural and linguistic needs of students, an evaluator is not only conducting an unethical assessment, they are in violation of the law. Not having an understanding of one’s world view and that of the examinee, can lead to misperceptions, negative stereotyping, miscommunication and bias in assessment procedures, interpretation, and ultimately incorrect results (i.e., Sattler, 1988). For evaluators, these assumptions are especially pertinent to the assessment and evaluation of CLD children, because they are the individuals who are improperly assessed (Lam, 1993). Culture is a component of world view that is often misunderstood.

We must begin by understanding what is entailed by culture. Culture is defined in the American Heritage Dictionary as “the totality of socially transmitted behavior patterns, arts, beliefs, institutions, and all other products of human work and thought characteristic of a community or population” (Houghton Mifflin Company, 1991, p. 348). What we see in our schools, however, may be students and families who are not of the same culture, and who may hold different sets of values and beliefs. The key word here is “may.” This is what is in question and must be assessed. If a student is from a different culture than that of the majority, then they may be experiencing the phenomena called acculturation. Acculturation, “focuses on the process of psychological change in values, beliefs, and behaviors when adapting to a new culture” (Houghton Mifflin Company, p. 53).

According to Padilla (1980), acculturation can occur at both the group and individual level. The first step in the acculturation process is contact. By the time the student has entered your school, they and their family have reached the first stage, contact with a “culture” that is different from theirs. They may then experience what Padilla identifies as “acculturative stress.” This is also known

as conflict, in that the student may experience extreme differences between the native culture and the new culture. For example, there are the differences in the views of development between the Navajo culture and Western culture.

Manson-Montoya & López (In Progress a) discuss that the Navajo society does not place importance on time and/or chronological stages of child development, as does the Western society. The Navajo culture believes that growth and development is unique to the individual child. Thus, growth and development is considered sacred and should not be measured. Giving certain identification and labeling a child through measurement is not healthy in the Navajo culture. From the Navajo perspective, such acts are called a transfer of bad thoughts and words onto a child or person. The Navajos believe that thoughts and words are very powerful and should be used very carefully (Witherspoon, 1977).

Padilla further describes that the student and their family may then find themselves within one of the three stages of adaptation to the new culture:

1. **Adjustment**, where the student and/or family may totally adopt the new culture's language, traditions, and beliefs. In this phase, we see almost a total denial of their true race/ethnicity. Individuals in the other phases may view individuals in this stage as "sell-outs" of their culture.
2. **Reaction**, they may react to the new culture and challenge the new culture. Individuals in this phase may question why they have to adapt to the new cultural norms.
3. **Withdraw**, the individual or group literally segregate themselves to maintain native cultural norms. This is witnessed in communities, for example, that only communicate in their native language, and do not associate with members of the dominant culture.

There are some instruments that specifically assess acculturation. These should be referred to for sample questions; however, several of the instruments, are normed on adults and follow a linear unidimensional approach of understanding acculturation (Matthiasson, 1968). A unidimensional approach assumes that individuals fall within one of three categories:

Acculturated is characterized as individuals who totally adopt the new culture's values, norms, language, etc.

Unacculturated is characterized as maintenance of native beliefs, traditions, and a refusal to learn the new culture's language and values.

Bicultural is characterized by the student who has adopted the values and beliefs of the new culture and maintained the language, traditions, etc. of the native culture.

McFee (1968) developed a two-culture matrix approach of understanding how a group or individual may identify with the native and new cultures. The categories mentioned in the unidimensional model are maintained, with the addition of the "marginal" person, who identifies with neither the native nor new culture.

Keefe & Padilla in 1987 developed a more realistic approach of understanding the acculturation of an individual. Opposed to categorization of the individual along a continuum or within a matrix, Keefe & Padilla conceptualized and operationalized a multidimensional approach to understanding acculturation. Under this new approach, specific traits and behaviors from each culture are assessed and analyzed.

These tools for assessing acculturation were a starting point in understanding what the measures are attempting to assess. Another more functional approach is to interview the student and the parent to assess for

acculturation (i.e., Ponterotto, Gretchen, & Chauhan, 2001). This gives the evaluator an impression as to whether the student and the family have traits that are associated with each culture, to assist in determining if the student/family is enculturated (has maintained native language and cultural values and beliefs; i.e., Kim & Abreu, 2001) or acculturated (has adopted the new cultures language and traditions, etc).

As Padilla indicated, acculturation instruments have measured four areas of acculturation. These include 1) ethnic identity and generation; 2) reading, writing, and cultural exposure; 3) ethnic interaction; and 4) language familiarity, usage, and preference. We see that the assessment of acculturation requires an understanding of the student's ethnic identity. Ethnic identity has been described as what beliefs and attitudes individuals have toward themselves, members of the same minority group, members of different minority groups, and members of the dominant group (Sue & Sue, 1990). Some theorists have made reference to ethnic identity as being separate from acculturation, while some use the term interchangeably. In either case, it should be noted that children are not developmentally capable of identifying with their race/ethnicity. Their parents, as discussed for example by Bernal & Knight (1997) impose their identity on them. With this in mind, evaluators need to be sure to also assess for acculturation and ethnic identity of the parents/guardians, to truly understand the student's current situation.

Furthermore, language, is also only one aspect of culture. Yet many times, service providers assume that if we assess for language, we have completed our goal of conducting a nondiscriminatory assessment (López, In Progress a). Since IDEA specifically states assessment in the Native Language, Language Assessment will have its own section within the document.

The factors mentioned above that are common in acculturation instruments is a great starting point in developing interview questions for the assessment of acculturation. Appendix A, is a list of sample case history

questions that look at culture and language (López, In Progress b). Appendix B of the document has a sample Student Interview (López, In Progress c), that includes questions that can be used to assess the acculturation and language of a student who is evaluated.

With these ideas in mind, we can see where measures that are not normed on the individual assessed could affect the results and thus interpretation. For example, in assessing self-concept, if an instrument normed in Tennessee and Kentucky, developed from a western view (individual, independent) of self-concept, is used on a Latino student from the southwest, who may be unacculturated and views self-concept from a family/group oriented perspective, their responses to the same questionnaire, may have varying results, and be actually measuring other constructs besides self-concept. In other words, are we assessing self-concept, for the true idea of one's view of themselves, or are we assessing acculturation?

Understanding Language and Language Acquisition

As more Limited English Proficient (LEP) children enter educational programs, it becomes important for professionals to know how to assess language proficiency and language development (i.e., McLaughlin, Blanchard, & Osanai, 1995). For CLD children who have been referred to special education programs for possible developmental delays, or academic/behavioral/speech concerns, the critical issue evaluators most often face is to distinguish a language difference from a language disorder (Roseberry-Mckibbin, 1995). Appendix C is a set of guidelines to assist practitioners with this idea. To understand language acquisition, however, we must begin with a conceptualization of the process.

Cummins (1984) suggests that it takes an individual 2-3 years to acquire what is referred to as, social language. This is known as Basic Interpersonal Communication Skills (BICS). It takes 5-7 years for an individual to acquire

language skills needed for academic success, known as Cognitive Academic Language Proficiency (CALP) (Yansen & Shulman, 1996).

Many times, BICS and CALP are not considered when a student is referred for special education evaluation. The teacher may think that because the student is communicating with others on the playground (social language) but does not experience academic success, the student may have a learning disability and is then referred for testing.

Language Assessment

“Given the responsibility of the evaluation of CLD children, evaluators are faced with the complicated task of determining the language or language(s) in which a child is most proficient. At best, this process is a complicated and controversial task (de Valenzuela & Cervantes, 1998). De Leon and Flores (In Progress) assert that traditionally, linguistic information often takes on a “minimal at best” approach during the evaluation of CLD children. Specifically, evaluators rely solely on home language surveys to describe the depth of a child’s language experiences and abilities. McLean (1998) states that ‘it is essential that appropriate procedures are followed to determine which language should be used in assessing the child and to understand the impact of second language acquisition on a child’s development and performance in the home and early childhood setting.’

It has been well-documented (Baca & Cervantes 1998, Hamayan & Damico, 1991; De Leon & Cole 1994) that critical to effective instruction for CLD children is the determination and selection of the appropriate language or languages of instruction. For CLD children who have also been identified as exceptional learners (CLDE), the determination of the language or languages of instruction is a critical aspect in the development of individualized education programs (IEP) that are culturally and linguistically appropriate” (Flores, et. al., p. 10-11).

Under IDEA, evaluators are required to conduct assessments in the child's native/dominant language. Thus, we need to determine language proficiency/dominance. "Language proficiency refers to the level of skill or the degree to which the student exhibits control over language use" (Yansen & Shulman, p. 357). There are five levels of language proficiency that are considered:

Levels	Description of Proficiency (L1 and L2)
1	Non-speaker
2	Very Limited Speaker
3	Limited Speaker
4	Functional Speaker
5	Fluent and Proficient Speaker

(Yansen and Shulman, p. 357)

The Home Language Survey is used to begin the process of determining language proficiency and dominance, and educational language programming. Most school districts use this survey as part of the registration packet when the child enters school. Common questions that are asked of the parents include: "What was the first language learned?" "What language is most frequently used at home?" "What language do you use with your child?" and "What language do adults use in the home?" (Ortiz, 1992; Yansen & Shulman, p. 358). However, as stated above, this is only the first step in language assessment, we need to follow up with classroom observations as well as interviews with the parent and the use of other language screening techniques (i.e., Romero & López, In Progress a). Interviewing the parents and teacher could assist with obtaining true language information (i.e., López, In Progress a).

Several tests have been developed to assess language proficiency/dominance. One of the most common measures used is the

Language Assessment Scale I & II (DeAvila & Duncan, 1977). Some other language proficiency/dominance measures include the Bilingual Syntax Measure (BSM; Burt, Dulay, & Hernandez-Chavez, 1976), The Bilingual Verbal Abilities Test (BVAT; Muñoz-Sandoval, Cummins, Alvarado, & Ruef, 1998), & La Bateria Woodcock-Muñoz-Revisada (Woodcock & Muñoz-Sandoval, 1993).

Since there are no actual measures to assess language proficiency/dominance in other languages besides Spanish, and those assessed in the BVAT, evaluators can assess language by utilizing informal techniques (i.e., Romero & López, In Progress a). One technique is to have the student tell a story from pictures that are presented, or from a book without words in both the native and second language. The story can be audiotaped and analyzed for content and grammar (Yansen and Shulman) by a native speaker of the language. This can give the evaluator a sense of the student's verbal abilities in both languages (Yansen and Shulman).

A Multicultural Assessment Schemata

Note: Portions of this section are adapted from López (In Progress a).

Pre-referral Activities

When a child is beginning to experience academic and/or behavioral difficulties in the classroom, parents should be informed right away. Although this makes sense, many teachers fail to mention the problems until the initial child study team (CST) meeting. School personnel should also begin to utilize Teacher Assistance Teams (TAT; i.e., Collier, 1998), such that some of these difficulties can be resolved within the regular classroom setting.

TATs should consist of school and community members that can assist with students who may experience difficulties in the class. Many regular education personnel are unaware that such resources are available. In addition, many members of the school do not understand the culture of the community. It

is at this point that cultural/community resources can be utilized, should the parent choose to.

Another suggestion, which other states and some school districts have implemented is a TAT and/or Child Study Team (CST) team composed of both regular and special education personnel. This is of course dependent on the reasons for referral. Respective personnel are consulted, depending on the needs of the student. If there is a language issue, for example, consultation is made with the Speech and Language Pathologist, along with the Diagnostician/School Psychologist. This may need to go beyond the school setting, such as in some Native American communities, who utilize the Hand Tremor when there are concerns about an individual's difficulties (i.e., Manson-Montoya & López, In Progress b). Why should both school and community be taken into account? Many students are inappropriately referred for special education evaluation for language issues that may be due to second language acquisition difficulties. In addition, when students have academic/behavioral difficulties, information such as the amount of time the student has spent in the new school district, and time spent in the US, is valuable information, in that they may actually be experiencing acculturative stress.

Many students are placed at a disadvantage for various reasons and will struggle to make it through school. This should also be discussed during the pre-referral process. "Some students simply are not ready chronologically, developmentally, or academically to succeed in a particular grade" (Grant & Richardson, 1999, p. 1). To meet grade level expectations and district standards, students considered for special education referral might actually need more time to learn concepts and develop essential skills (Grant & Richardson).

The students' living conditions simply may not allow for them to receive the nutrition, support, and interaction that are important for achieving academic success. Many of these students are not afforded the opportunity to experience Maslow's Hierarchy of Needs (i.e., Myers, 1995, p.400), which include

physiological needs, safety needs, belonging and love needs, esteem needs, and self-actualization needs.

The alarming numbers of dysfunctional family situations, parent neglect, and abuse are all factors that impede student achievement. Many times children come to school after having witnessed domestic abuse, which may also have involved alcohol or drug abuse. As a result, these students tend to have more behavior problems with peers; may be antisocial; become delinquent; or develop emotional problems (i.e., Martinez & López, In Progress).

Factors such as poor standardized test scores, and low academic achievement are important issues that are currently addressed in many school districts across the country. Such measures are used to help determine whether a special education referral should be made (i.e., Martinez & López). An important factor to consider is that many students come from culturally and linguistically diverse backgrounds. Bessent, Blackmon, Cavanaugh, Hime, Holtzer, McNulty, Roberts, & Simmons (2000) reported that civil rights laws dictate that for LEP students to acquire the essential skills needed to be successful in the classroom, schools will provide services to assure English acquisition. Bessent, et. al. further assert that schools should be held accountable in ensuring the assessment(s) used in statewide testing, measure what they are intended to measure, and that appropriate modifications be made due to language concerns. Examples include “version of the test in the student’s native language, the allowance of extended time, or the use of bilingual dictionaries” (p. 6). As found with IDEA, LEP students should be included in statewide assessments unless a waiver is justified (Bessent, et. al.).

The individual making the initial referral should be trained to provide detailed descriptions of the child’s difficulties. Just as we developed behavioral management plans for students already in special education, the referral should not only describe the problem, but also the antecedents, and consequences. In regard to academics, specific functional information needs to be provided. By

this we mean specific information expressed by the referring teacher, both verbally as well as in written form. The TAT and CST can assist with this portion, but too many times, referrals are passed through the process with statements such as, “Student X is referred due to academic and language difficulties.” The questions such as what specific academic areas are of concern and what kind of language problems exist (i.e., speech, receptive, expressive, phonological) allows the TAT and CST to develop appropriate interventions.

The Formal Evaluation Process

Once the pre-referral activities have been utilized for a reasonable amount of time, and no gain is observed, then the formal evaluation can be recommended and conducted upon parental consent (IDEA-97). The parental rights and the evaluation process should be explained in a language and form that is understandable to the parent. It is at this point that the limits of confidentiality should be discussed with the parents, so that they understand what type of information will be in the written report, and what information will need to be reported (i.e., suicidal ideations, abuse issues) to the authorities and/or appropriate school personnel (i.e., López, In Progress c).

The limits of confidentiality should also be discussed with the student as soon as they are in the testing situation (López, In Progress c). Once these are discussed, the next step is to develop rapport and conduct an interview. The next section will discuss in more detail the interview. From the results of the interview and information gathered on language proficiency, the examiner can determine what language the assessment should be conducted, and along with the referral question, determine the assessment instruments to assist in the provision of the most useful information for the Individualized Education Plan (IEP) committee. In addition, the information on acculturation, which is gathered through the interview and the results from the language proficiency/dominance, will assist in an appropriate interpretation of the formal

and informal test results. Appendix D was developed to assist evaluators to assure that every step of a culturally competent assessment is followed (Romero & López, In Progress b).

The Use of Translators/Interpreters

A major problem faced by school personnel working with LEP students and their families is the issue of language differences. “To address this problem, educators often contract the services of school interpreters” (Lopez, 2000, p. 379). Translators/interpreters should not only be trained and certified/licensed, they should be knowledgeable of special education terminology. If certified translators/interpreters are not available, bilingual school personnel should be hired and trained specifically on how to translate during consultation activities, interviews, CST meetings, evaluations, IEP meetings, etc. (Lopez, 2000).

As suggested by Lopez (2000) in regard to consultation, prior to an IEP meeting, evaluation or parent conference, school personnel should meet with the translator to discuss:

- *the process of the activity.
- *topics relevant to the roles of interpreters/translators, which include professional conduct (i.e., confidentiality, professional behavior, and dual roles).
- *the assessment procedures, such as the objective measures, interviews, and projectives that will be used.
- *terminology, so that the translators can become familiarized with the terms that will be used.
- *language and cultural differences that may surface during the activity, as well as the importance of complete translation during the session.

(Adapted from Lopez, 2000, p. 386)

Lopez (2000) further suggests that the translator be given ample time to review and translate any written and/or test materials. In addition, each translation session should be followed up with a debriefing to discuss the activity and address any issues.

The Interview

(Adapted from Meraz & López, In Progress)

Whether a school psychologist or speech and language pathologist is involved, the interview is an essential part of the assessment process. In the analysis of evaluations for the pre-school study and review of other evaluations for three year evaluations, this essential tool is often under utilized. Sattler (1995) refers to the interview as one of the four pillars of assessment. The following goals of the interview are adapted from Takushi & Uomoto (2000, p. 51):

- *Establishing a rapport
- *Clearly defining the referral question
- *Assessing the student's strengths (academic, personal, family, school resources)
- *Gathering background, cultural and linguistic information
- *Developing a tentative hypothesis of concerns and determining assessment instruments and techniques would be most useful

If a decision to refer a CLD student is made, examiners should be aware of the crucial part the interview plays in the assessment. Interactions between examiner and examinee during the interview can be impacted by the culture of each person (Geisinger, 1992). In fact, "because responses given by both the interviewee and the interviewer require subtle forms of cognitive activity...there is always the potential for opinions, attitudes, and even facts to be distorted"

(Sattler, 1988, p.462). Thus, if accurate evaluations and diagnosis are to occur, there is a need for growth in awareness of CLD issues by school personnel who interview students and parents. Interviews are the place in which evaluators need to begin “hypothesis testing” of their impressions of what the issues are to assess (i.e., López, In Progress c). The hypotheses are then validated through formal and informal measures.

Much of the research done on interviews with CLD populations is in the field of counseling. Thus, many of the following recommendations have been adapted to fit the school environment, and apply to most school personnel dealing with CLD students and their families.

The first recommendation in conducting appropriate interviews involves the school personnel to consider the worldview of the student, and how this may interact with the worldview of the evaluator. Young & Marks (1986), Geisinger (1992), and Sattler (1988) suggest that factors such as social class membership, cultural background, different verbal and nonverbal communications, stereotypic interpersonal judgments, different values, different explanations concerning the causes and solutions of problems, and different social and interpersonal needs, can become obstacles even to the well-intentioned examiner.

A second recommendation is to acknowledge the barriers the examinee may face as the interview proceeds. For example, questions may be misunderstood and/or answers to questions could be limited or misperceived, if the examinee, or family member, has limited proficiency in English. Examinees may have recently moved to the United States and not be familiar with all the verbal and nonverbal communications of the dominant culture; thus second culture acquisition (acculturation) must be considered (Sattler, 1988; Geisinger, 1992).

The third recommendation involves the examiner decrease the cultural and linguistic obstacles such that the information from the interview becomes

useful. Suggestions for working with populations of a different culture and language include:

- studying the culture, language, and traditions of other groups
- learning about your own stereotypes and prejudices
- seeing the strengths and coping mechanisms of other groups
- appreciating the interviewee's viewpoint and showing a willingness to accept a perspective other than your own
- recognizing when group membership differences may be intruding on the communication process
- finding ways to circumvent potential difficulties
- monitoring verbal and nonverbal communications
- establishing trust by allowing the interviewee to perceive that you possess expert knowledge, are a person who can be relied on, and are a person who has good intentions toward him or her

(Sattler, 1988, p. 42)

The interview should then be seen as the backbone of the evaluation. In other words, the rest of the assessment should be a validation of the information gathered from the student, parent, and teacher (i.e. Takushi & Uomoto, 2001; López, In Progress c). Utilization of multiple sources is not only a requirement by IDEA, but assists in the determination if the same strengths and weaknesses are seen at home and at school.

Assessment Instruments

A culturally competent assessment does not imply that a standard battery of assessment is appropriate for specific populations. Why can we not make this assumption? One obvious reason is that there are within group differences. By this we mean just because two students are Native American, does not mean

they have the same level of English proficiency; that they have had the same types of experiences; and have acculturated to the same traits (i.e., López, In Progress d). Thus, individual instruments to assess cognition, academic achievement, language development, processing, etc., depends on the examiner's knowledge of what the various assessments measure, the norms of the measures, and the implications of the results (i.e., Padilla, 2001). Again, we need to reference the referral question and the results of the interview.

Assessment Results and Report Writing

(Adapted from López, In Progress d)

Cultural and linguistic information should be present throughout the report. This serves as a reminder for the evaluator, as well as assist in the assessment schemata through which individuals will base the measures used and their diagnostic impressions. Thus, current diagnostic and school psychology students are trained to place the information in three places within the report. The first place it is identified is in either the background information, and/or behavior observations or interview portions. Their impressions based on the information regarding acculturation and linguistic abilities are reported for the first time. Specific examples should be shared to further validate one's impressions. It is also mentioned in these portions of the report in such a manner so the reader will realize where the impressions came from. The next place it is recommended to place the information is before the assessment results and interpretation is presented. This involves a report of the validity of the results of the measures utilized based on cultural and linguistic information. The third place that there should be mention of cultural and linguistic factors is in the summary and recommendations portions. This way, a reader can read almost any portion of the report and the cultural and linguistic information is present. Appendix E is a sample report with the critical points in bold (From López, In Progress d).

Recommendations

Too many times, evaluators do not include functional types of recommendations that were obtained from the assessment for school staff and the family. Another major error, in the authors' opinion, is the lack of recommendations on language, language instruction, culture, and interventions regarding cultural issues. This entails an understanding of second language acquisition models, appropriate language instruction models, cultural issues that may need to be addressed in counseling, and the lack of school personnel to provide the appropriate intervention. We must keep in mind that, we need to mold the plan around the student's needs and not try to fit the student to the program in place.

Multicultural Considerations in IEP Development

Even if cultural issues have been considered during the assessment portion of the referral, it has been observed that during the development of the Individual Education Plan (IEP), the multicultural issues are no longer considered. We must include, by law, parental involvement in development of the IEP.

Yates & Ortiz (1998, p. 194) specify some information that should be included in the IEP:

1. the language(s) of instruction for each goal and objective
2. instructional strategies which take into account language proficiency, academic skills, and modality and cognitive style preferences
3. curricula and materials designed specifically for linguistically and culturally diverse learners
4. motivators and reinforcers which are compatible with the student's cultural and experiential background

We would like to add cultural issues that may need to be addressed, such as acculturative stress/identity issues that may affect a student's ability to function within the school environment. Recommendations should include intervention techniques, validation of the students/families values and beliefs and a plan to inform of the new cultural values, beliefs and expectations, such that the student and/or family can be assisted in their transition into the new culture, if they so please.

The authors of this document also suggest having a pre-IEP meeting for the evaluators to discuss the assessment results with parents, prior to the actual IEP meeting (López, In Progress d). This allows the parent time to process the information, have an opportunity to ask questions without feeling that they are taking from school personnel's time. In addition, they are not in the "hot seat" during the IEP meeting, with a room full of school personnel, and expected to make an informed decision.

Even if the evaluation and the IEP are conducted taking cultural and linguistic factors into account, the authors along with Yates & Ortiz, have seen a lack of appropriately trained personnel to implement the assessment and ultimately the plan that is developed. Thus, school districts need to train and/or hire teachers and ancillary staff that can effectively assess as well as implement the recommendations provided by the IEP committee.

APPENDIX

APPENDIX A

Sample Multicultural Case History Questions

MULTICULTURAL SAMPLE QUESTIONS THAT CAN BE INCLUDED IN THE CASE HISTORY

Cultural

(López, In Progress b)

Child's place of birth?

Child's generational level?

How long has your child been in the current school district? In the U.S.?

Schools your child has attended? Length at each school?

What ethnicity is your child?

Number of siblings in the home and where in the sibling order the child in question falls?

Who does your child associate with at school? At home?

What traditions are followed in your family?

In what language does your child read? Write? Watch television?

What language does your child speak at home? At school?

Parents Occupation?

Parent's perception of cultural differences?

Language/Communication

(Adapted from Gadsden ISD; López, In Progress b)

Language Proficiency – LAS ORAL: Date _____ English Level _____ Spanish Level _____

LAS Rd/Wt: Date _____ English Level _____ Spanish Level _____

Language Screening Results/Impressions: _____

What academic interventions have been used? _____

Length of time interventions were utilized: _____

Language of instruction: _____ Student's language preference: _____

Type of Language Program: _____ Length of time in the Program: _____

Is student in dual language program? YES NO Comments: _____

Is English a second language? _____ YES NO If Yes, how is this a factor in the student's learning problems? _____

Language classification: _____ IF EO, is this a factor in the student's learning problems? _____

Student's ability to use language:

Student's ability to understand language:

Is student's language proficiency interfering with learning? Yes No If Yes, explain: _____

Difficulty with articulation L1 and/or L2 (ability to speak intelligibly?) Yes No If Yes, describe:

Difficulty with fluency L1 and/or L2 (stuttering, atypical rate, rhythm, repetition)? Yes No If Yes, describe:

Difficulty with voice L1 and/or L2 (pitch, loudness, voice quality)? Yes No If Yes, describe:

Other language/communication factors: _____

Does the student attempt to speak/learn English?

Educational History

Parent's preference of language instruction?

Language used with siblings? Peers? Parents? Teacher?

APPENDIX B
Student Interview

Student Interview

(Adapted from Phil Chapman, NCSP Revised 2-27-90 Student Interview 1.5; Preschool Acculturation Questionnaire Flores, López, De León, 2000; Acculturation Questions from López Chapter, In Progress; From López, In Progress a)
Cultural and linguistic questions are in bold.

Name **Date**
Place of Birth **How long in the US/Generational level?**
When did you move to the present School? Grade
DOB

1. What do you like to do for fun?

2. Do you have any hobbies?

What kind of TV shows do you like to watch?
Which is your favorite cartoon?

What kind of music do you listen to?
Which is your favorite group?

FAMILY RELATIONS

3. Who lives at your house, beginning with the oldest person:
(biological, step, or adopted) (role, name, age/grade, job) **Job of parents is a means
of assessing for SES.**

In what language do you speak with the various family members?

(If parents are divorced, age at divorce _____. How long with step-family?_____)

4. When you have a problem, whom in your family can you tell about it?

5. Who gives you the most problems?

6. What happens at home when you do something wrong or you break the rules?

In what language are you disciplined?

What holidays does your family celebrate? How?

PEER RELATIONS

7. If you were going to be on an island for the rest of your life, and you could have only three other people with you, who would you choose?

1) _____ 2) _____ 3) _____

8. Do you have a best friend? _____ Why did you pick him/her?

Who are some other friends that you have at school?

How do they identify themselves (i.e., Mexican, Mexican American, Chicano, Navajo, Native American, Hispanic, etc)?

In what language do you communicate in with your friends?

Who do you hang out with at home/community?

How do they identify themselves (i.e., Mexican, Mexican American, Chicano, Navajo, Native American, Hispanic, etc)?

9. Are you involved in group activities (a church group, Scouts, band, mariachi, etc.)?

MEDICATION

10. Do you take any kind of medicine? _____ Did you used to take medications _____

Which kind?

11. Have you ever been in a serious accident? _____ Hospitalized? _____

COUNSELING

12. Are you in any type of counseling? _____ Did you used to be? _____
Therapist's name: _____ Hospitalized? _____

LEGAL SYSTEM

13. Have you ever been in trouble with the law? _____ Probation? _____

WORK

14. Are you currently working? _____ How long at this job? _____
Doing what? _____ Hours per week _____

15. Do you have a driver's license? _____ Do you have a car? _____

*16. What do you want to do when you are grown?

DRUGS/ALCOHOL

17. Have you ever experimented with drugs? _____ Which ones?

18. When was the last time you used them? _____

19. Do you drink? _____ How often do you get drunk? _____

20. When was the last time you were drunk? _____

SEXUALITY

21. Suppose you could start all over again, would you rather be a boy or a girl?

22. Are you going with anyone right now (Do you have a boy/girl friend)?

In what language do you speak with you boy/girlfriend?

23. How long have you been going together?

SELF-CONCEPT

24. If I asked your parents what they think about you, what would they say?

25. Your friends?

*26. If you could change anything about yourself, what would you change?

*27. What do you dislike more than anything else?

**What race do I consider myself?
How do I identify myself (Ethnicity)?**

CONSCIENCE

*28. What is the nicest thing that ever happened to you?

*29. What is the worst thing that ever happened to you?

30. What was the worst thing you've ever done?

31. How did you feel?

32. How do you feel when you do something you know is wrong?

FEELING STATES-ANXIETY

33. What makes you nervous?

34. What happens when you get scared like that?

35. Do you ever feel scared like that for no reason at all? Tell me about that.

*36. What frightens you most of all?

When I get scared, in what language do you think in? Communicate in?

FEELING STATES-DEPRESSION

37. What is the saddest thing that ever happened to you?

38. Do you ever feel sad even though there's no good reason? Tell me about that.

39. When you feel sad like that, does it bother you in other ways, like you can't sleep, appetite, etc.? How many days does it last?

FEELING STATES-ANGER

40. What sort of things make you angry?

41. What do you do when you get very angry?

When you are angry, in what language are you thinking? Communicating?

ACADEMICS

In what language do you think?

In what language are you taught in at school?

In what language do you communicate in when in class? Outside of class?

In what language do you read?

In what language do you write in?

In which language do you prefer to read? Write?

In which language do you do better at school.

What is your favorite academic subject? Why?

**Which subject are you not doing so well in?
Why do you think you are having difficulty?**

Do you understand the teacher's directions?

What language does the teacher use in class?

What language do you answer the teacher if asked a question?

Do you understand the work you are doing in the classroom?

REALITY TESTING

42. Some people, when they get very nervous, have funny experiences. Did it ever happen to you that you heard voices inside/outside your head?

Were you fully awake?

(frequency/severity)

What did you think that was?

43. Some kids have told me that they think their minds are controlled by something else. Others believe someone is looking at them or talking about them when it really isn't so. Did something like that ever happen to you?

FANTASY

44. If you had a wish and it would come true, what would you wish?

*45. What good dreams do you usually have when you are asleep?

*46. What bad dreams do you have?

*47. Do you ever have the same dream over and over again?

In what language do you dream?

ADDITIONAL COMMENTS

APPENDIX C

General Guidelines for Distinguishing Language Differences from Disorders

GENERAL GUIDELINES FOR DISTINGUISHING LANGUAGE DIFFERENCES FROM DISORDERS

- **The disorder must be present in the child's native language (L1).**
- **Testing must be conducted in the native language (L1) and/or both the native language and in English (L2).**
- **Evaluations must be conducted using both formal and informal measures.**
- **Language Assessment must be conducted in developmentally appropriate settings.**
- **Language Assessment must take into consideration the language experiences of the home.**
- **Language must be assessed in a variety of speaking contexts.**
- **Patterns of language usage must be described.**
- **Error patterns must be determined.**

The child's language performance must be compared to that of other bilingual speakers who have had similar cultural and linguistic experiences, i.e., the child should be

compared to members of the same cultural group who speak the dialect and who had similar opportunities to hear and use the language.

From Ortiz, 1992; Meller and Ohr, 1996; and others

APPENDIX D

Checklist for Pre-Referrals & Referrals

CHECKLIST FOR PRE-REFERRALS & REFERRALS

(Developed by Romero & López, In Progress b)

DATE

Observation of Problem	_____
Contact with Parent	_____
Referral to Teacher Assistance Team (TAT)	_____
(Language and cultural considerations taken into account)	
Follow-up with TAT	_____
Referral to Child-Study Team (CST)	_____
Follow-up with CST	_____
Follow-up with CST	_____
Vision/Hearing	(to nurse) _____
	(returned) _____
No pass Referral to Audiologist	_____
Optometrist	_____
Screenings (i.e.,) Terra Nova, SLP, OT, PT, PSYCH,	_____
Permission to Test	_____
Parent Rights	_____
Limits of Confidentiality: Parent	_____
Student	_____
Formal Evaluation	_____
Referral to Ancillary (DIAG., SLP, OT, PT, PSYCH, SOC. WRK)	_____
Referral received	_____
Interviews Student	_____
Parent	_____
Teacher(s)	_____
Acculturation Information	_____
Observations	_____
Assessment of Language Proficiency	_____
Test Administered	_____
_____	_____
_____	_____

Evaluation Completed

Report Completed

Include cultural and linguistic information in three portions of report.

1. In background information
2. When interpreting assessment results
3. In the summary and conclusions portion

Pre-IEP Meeting

IEP Meeting

COMMENTS/NOTES

APPENDIX E
Sample Report

SAMPLE REPORT

**Case Study Format adapted from Multicultural Evaluation & Consultation
Associates M.E.C.A.
(From Lopez, In Progress d)**

Psycho-Educational Evaluation Report Confidential

Name: X	Birth date: XXXXXXX
Sex: Male	Age: 9-9
Parent(s): Ms. XXXXXXX	Address: XXXXXXXXX XXXXXXXXXX
Home Phone : (XXX) XXX-XXXX	Work Phone: (XXX) XXX-XXXX
Primary Language Spoken at Home: English/Spanish	Ethnicity: Hispanic
Primary Language of the Student: Spanish & Recently English	Other Languages: N/A
School: X Elementary	Grade : 5th
Evaluation Date: 7-17-01	Report Date: 7-18-01

EVALUATION TEAM

Parent(s): Ms. X
Educational Diagnostician: X
Speech-Language Pathologist: N/A
Other: Teacher, Ms. X

REASON FOR REFERRAL

X was referred for testing due to LEP and bilingual strategies not correcting the problem of low academic performance.

BACKGROUND INFORMATION

X indicated he was born in Mexico and at age 3, moved to NM, and has been in NM for the last ten years and enjoys it.

FAMILY BACKGROUND & CULTURAL & LINGUISTIC FACTORS

X lives with mother and one older brother and older sister, as reported by mother. There have been no major changes in the home. X reports she speaks both English and Spanish in the home. Before the referral was initiated, mother reported that the primary caregiver was grandmother who spoke only Spanish. X's responses to the interview and mother's interview suggest that X is bicultural and is becoming more proficient in English. Mother further noted that she, along with the teacher, have worked extremely hard with X.

HEALTH/MEDICAL HISTORY

According to school records, X passed both the vision and hearing screening. Mother indicated that X was slow in walking (1 yr. 2 mos.) and talking (1 yr. but nothing one could understand). There were also delays in potty training according to mother. There are no current concerns.

EDUCATIONAL HISTORY

The following is a summary of the educational history as found in school records provided to the examiner. Records and teacher indicate that X has been in Bilingual/ESL Program since kindergarten. No other concerns prior to 3/99 noted on information provided to examiner.

X's ratings of English language use, understanding language, articulation, fluency and voice was poor. Current grades in Reading is N/U with the comment that X is far below grade level (Level 4 kinder); Language Arts: N/U with the comment that X still needs help with letter sounds; Math: S-. He has been absent 8 days due to illness. X is experiencing difficulty in math, reading, spelling, phonics and writing.

Behavioral concerns indicated include: poor attention and concentration, shifts from one incomplete task to another, difficulty following directions, noncompliance with teacher directives, and being easily distracted. The teacher rated X average in working

cooperatively with others, having a usually happy disposition, and above average in making and keeping friends in school. Regular education alternatives indicated included modified instructional methods, re-teaching, modified instructional pacing, parent conferences, and modified instructional materials. Alternative programs tried included, Bilingual Education, ESL, tutoring, and summer school. Modest Improvement was noted.

According to the PHLOTE Compliance Review home language is other than English. The Proficiency Assessment indicated IPT Oral as LES, IPT Reading NER, and IPT Writing LEW.

The Student Study Team summary form indicated that X was not progressing at level because of language. Interventions included altered Bilingual Program and IDI during previous school experience. It was noted that X kept the same growth, and that growth occurred only because of small group setting.

GENERAL OBSERVATIONS

X was cooperative during the testing session. He was needing some prompting during the last portion of the Woodcock-Muñoz, Pruebas de Aprovechamiento but nothing beyond the normal attention span of someone his age. X held his pencil in an awkward manner, during the administration of the VMI.

EVALUATION PROCEDURES

Assessment Instruments

Interview with Student
Interview with Parent
Interview with Teacher
School Records
Woodcock-Muñoz Language Survey, English and Spanish Forms
Universal Nonverbal Intelligence Test (UNIT)
Bateria Woodcock-Muñoz Pruebas de Aprovechamiento-Revisada
Developmental Test of Visual Motor Integration

LANGUAGE PROFICIENCY

According to the results inquired from the observations, the interview (regarding culture) and language, the following should be interpreted with caution.

The Woodcock-Muñoz Language Survey was administered the following are the results:

English Form

	AE
Broad English Ability	7-2
Oral Language	4-10
Picture Vocabulary	3-6
Verbal Analogies	7-2
Reading-Writing Ability	7-11
Letter-Word Identification	8-6
Dictation	7-2

When compared to others at his age X's Broad English Ability, an over all measure of Cognitive Academic Language Proficiency (CALP), is at the Level 1-2 (Negligible to very Limited English proficiency). X's English Oral Language proficiency is at Level 1-2 (Negligible to Very Limited English oral language proficiency). X's Reading-Writing proficiency is at Level 1-2 (Negligible to Very Limited English).

Spanish Form

	AE
Broad Spanish Ability	9-8
Oral Language Ability	7-4
Picture Vocabulary	6-4
Verbal Analogies	8-5
Reading-Writing Ability	11-8
Letter-Word Identification	17-2
Dictation	8-6

When compared to others at his age level, X's Broad Spanish Ability, an overall measure of CALP, is at Level 3 (Limited Spanish. X's Spanish Oral Language Proficiency is at Level 2-3 (very Limited to Limited Spanish). X's Spanish Reading-Writing proficiency is at Level 3-4 (limited to Fluent Spanish).

Comparative Language Indexes (Spanish compared to English)

Broad Ability 47/3 Oral Language 21/3 Reading-Writing 75/4

For his age level, X performs overall CALP tasks with 47% success in Spanish and with 3% success in English. On parallel oral language tasks, X performs with 21% success in Spanish and with 3% success in English. On parallel reading-writing tasks, X performs with 75% success in Spanish and with 4% in English.

COGNITIVE DEVELOPMENT

Test administration was conducted entirely in Spanish. The results should be interpreted with caution due to the issues regarding language, attention and the issues regarding culture.

The Universal Nonverbal Intelligence Test (UNIT) was used to assess X's memory and reasoning abilities associated with cognitive development. The UNIT subtests measure pattern processing, problem solving, understanding of relationships, and planning abilities. The UNIT was designed to meet the guidelines of good cross-cultural assessments with students such as X. The UNIT is appropriate for examinees who are Limited English Proficient, examinees for whom English is a second language, and examinees that are eligible for bilingual education.

Results of the Universal Nonverbal Intelligence Test (UNIT). The standard version was administered. The following were the results:

	SS	PR
Memory Quotient	88	21
Reasoning Quotient	82	12
Symbolic Quotient	90	25
Nonsymbolic Quotient	80	9
Full Scale IQ	83	13

Memory Quotient:

The Memory Quotient measures memory from content (what was seen), location (when it was seen), and sequence (the order in which it was seen). X obtained a standard score of 88 on the Memory Quotient scale, which suggests his ability to perform complex memory functioning involving short-term recall and recognition of both meaningful and abstract material, is within the low average range of function compared to his peers. This is important in that these specific skills are also necessary for developing early literacy skills which provide the foundation for reading and written language (sequencing skills, gaining meaningful information from content [pictures, math problems, etc.]).

Reasoning Quotient:

The Reasoning Quotient measures pattern processing, understanding of relationships and planing abilities. X achieved a standard score of 82, which suggests his ability to think and problem-solve in both familiar and unfamiliar situations are within the low average range of functioning.

Symbolic Quotient:

The Symbolic Quotient is an index of an individual's ability to solve problems that involve meaningful problems using meaningful material and whose solutions lend themselves to internal verbal mediation, including labeling, organizing, and categorizing. On this composite, X achieved a standard score of 90, which is also in the average range of functioning.

Nonsymbolic Quotient:

The Nonsymbolic Quotient is an index of an individual's ability to solve problems involving abstract material or material that is not very meaningful and whose solutions are not conducive to verbal mediation. X achieved a standard score of 80 of the Nonsymbolic composite, which places his abilities within the low average range of functioning.

Full Scale Intelligence Quotient:

X's Full Scale Intelligence Quotient of 83 suggests that his overall cognitive abilities as measured by the UNIT, are within the low average range of functioning.

ACADEMIC PERFORMANCE

Academic testing was administered in Spanish. The Spanish academic test utilized was the Pruebas de Aprovechamiento-Revisada (Bateria-R).

Muestras de redaccion

<u>Cluster</u>	<u>Age SS (Spanish)</u>	<u>PR (Spanish)</u>
Amplia Lectura	95	36
Amplia Matematicas	66	1
Amplio Lenguaje Escrito	69	8

Broad Reading (Amplia Lectura) is comprised of the Letter Word Identification and Passage Comprehension subtests. It includes reading identification skills and comprehension of short passage. X's score in letter word identification is within the above average range with (SS=117) and passage comprehension in the low range (SS 77). In the Amplia lectura, X was within the average range. X will find the performance demands of age-level tasks involving *Amplia lectura* difficult.

Broad Math (Amplia Matematicas) is made up of Calculation and Applied Problems. Calculation measures X's skill in performing mathematical calculations in addition, subtraction, multiplication, and division. Applied Problems Measures X's skills in analyzing and solving practical problems in mathematics. In order to solve the problems, he must recognize the procedure to be followed and then perform the relatively simple calculations. X's scores are within the low range (Applied Probs SS=75) and very low range (Calculation SS=67), as compared to others at his age level from the normative sample. In Amplias matematicas X's performance was in the very low range, indicating definite problems in math. Age-level tasks involving *Amplias matemáticas* will be extremely difficult for him. He seems to have a foundation of addition and subtraction,

but difficulty in multiplication and division. In addition he seems to be having difficulties with applying the mathematical concepts he does know.

Broad Written Language (Amplio Lenguaje Escrito) consists of Dictation and Writing Samples. Dictation measures skills in providing written responses to a variety of questions requiring knowledge of letterforms, spelling, punctuation, capitalization, and word usage. Writing Samples requires X to phrase and present written sentences that are evaluated with respect to quality of expression. The student is not penalized for errors in the basic mechanics of writing, such as spelling and punctuation. X's scores are in the below average average range in writing sample (SS=70) but in the very low range in dictation (SS=69), as compared to others at his age level from the normative sample. This could indicate some difficulties in written expression. Age-level tasks involving *Amplio lenguaje escrito* will be very difficult for X. Difficulties were noted in the areas of grammar and punctuation.

VISUAL PROCESSING

The Developmental Test of Visual-Motor Integration (VMI) was administered to X in order to assess his visual-motor processing. The VMI is a developmental sequence of geometric forms to be copied with paper and pencil by the student. The primary purpose of the VMI is to help identify significant difficulties that some children have in integrating or coordinating their visual perceptual and motor (finger and hand movement) abilities. X received a Standard Score of 90, which indicates an average level of performance in the area of visual-motor processing based on this measure.

SUMMARY & IMPRESSIONS

X is a bicultural, Spanish speaking, 5th grade student. He has experienced some difficulties in the areas of math, reading and language arts. Results of the assessment suggest that X has low average intelligence with average reading ability to below average achievement scores in math and written language. Reports from the teacher further indicate that X continued to have difficulties even with bilingual programming interventions. This along with support and tutoring should be continued.

ELIGIBILITY DETERMINATION

X does meet the criteria to qualify for Special Education in the areas of math and written language.

Final decision regarding eligibility and educational support services will be determined as part of the Individualized Education Program meeting.

RECOMMENDATIONS TO STAFF AND FAMILY

- 1. It is recommended that X receive Bilingual Special Education services in a resource room setting to assist with his difficulties in reading and written language.**
- 2. It is recommended that the instruction be done primarily in Spanish, both in the Special Education and Regular Education Setting.**
- 3. Math and written language instruction in the class should be conducted in a small group setting to assist with monitoring. Basic mathematical concepts should be reviewed, and an emphasis on manipulatives be utilized.**
- 4. Written language instruction should consist of reviewing grammatical structure and rules. Review of phonemes, and allowing step by step instruction of the writing process is recommended.**
- 5. It is recommended that continual support and tutoring be provided to X, such that she maintains grade level functioning in reading .**
- 6. Transition into English should be discussed annually.**

Evaluator

APPENDIX F
Resources

RESOURCE LIST

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