



**CORE-SELECTIVE EVALUATION PROCESS  
(C-SEP): FROM CONCEPTUALIZATION TO  
CONTEMPORARY PRACTICE.  
Authors' Perspective and Updates**

Edward K. Schultz, Ph.D.  
Tammy L. Stephens, Ph.D.

Page Intentionally Left Black

Core-Selective Evaluation Process (C-SEP):  
From Conceptualization to Contemporary Practice.  
Authors' Perspective and Updates

by

Edward K. Schultz, Ph.D.

Tammy L. Stephens, Ph.D.

Edited by: Ronald L. Gardner, Ph.D.

Cover Illustration by Pixabay

Copyright © 2021

Dragonfly Publishing  
Houston, Texas



Page Intentionally Left Black

## Table of Contents

<b>INTRODUCTION</b>	<b>7</b>
<b>C-SEP IS ROOTED IN OUR COLLECTIVE EXPERIENCE</b>	<b>8</b>
<b>THE BASICS OF C-SEP</b>	<b>9</b>
<b>CONTEMPORARY FLUIDITY IN THE ASSESSMENT FIELD</b>	<b>11</b>
<b>MISCONCEPTIONS AND RESPONSES</b>	<b>16</b>
<b>FREQUENTLY ASKED QUESTIONS</b>	<b>19</b>
<b>WHAT WE'VE LEARNED AND WHAT SHOULD CHANGE</b>	<b>24</b>
<b><i>LESSONS LEARNED</i></b>	<b>24</b>
<b><i>FUTURE DIRECTION</i></b>	<b>26</b>
<b>CONCLUSION</b>	<b>28</b>
<b>REFERENCES</b>	<b>29</b>

Page Intentionally Left Black

### **Introduction**

The Core-Selective Evaluation Process (C-SEP) was introduced in 2015 (Schultz & Stephens, 2015). Six years later, it continues to gain popularity and has been recognized as an accepted practice for identifying the presence of a Specific Learning Disability (SLD). Oftentimes, however, ours has been an uphill struggle. We have persistently been met with skepticism, pushback and critique. Nevertheless, we have held fast to the principles of C-SEP, promoted them through training and peer-reviewed publications, and kept pushing forward because we love this profession and believe in our model.

At the same time, our profession has been experiencing a plethora of challenges that are causing the field to reevaluate and adapt its approach. These challenges, among others, include Federal oversight of the Texas education system and the SARS-CoV-2 (COVID-19) pandemic and its associated mitigation measures. Their impact on our work has been far reaching. Ironically, many of the changes we are witnessing are ones that we have been advocating for years.

This text is designed to position C-SEP within our contemporary environment. More specifically, the changes we have recently witnessed underscore the validity and viability of C-SEP. While the alternative models must adapt to meet evolving standards, C-SEP remains intact and continues to function as conceptualized and designed. We pen this manuscript with the hope that an increasing number of stakeholders will fully understand that the changes we are currently experiencing are, and have always been, advocated by us and are central pillars to our model. The text is organized as follows. First, we outline how C-SEP developed. Then we cover its basic principles, position C-SEP within the present landscape, and address common misrepresentations and questions we frequently encounter. We close by outlining some of the changes that we believe our field still desperately needs.



### **C-SEP is Rooted in Our Collective Experience**

In the simplest of terms, C-SEP is constructed upon a set of best assessment practices, that integrates an evaluator's professional judgment and advocates rigorous adherence to standardized testing protocol and legal regulations that guide our profession. C-SEP was conceptualized from our collective professional experiences as special education teachers, doctoral researchers and practicing diagnosticians. The following contributing factors lead to the development of C-SEP:

- As former special education teachers working with SLD students, we gained an understanding and appreciation of the importance of teaching and learning, and how informal assessments can be used to measure instructional response.
- As educational diagnosticians, we came to understand the problems associated with identifying SLD using standard score discrepancy models.
- As Ph.D. candidates, we were exposed to the debate and passing of the Individuals with Disabilities Education Act (IDEA, 2004), and simultaneously immersed in special education policy and the rigorous deliberations concerning Response-To-Intervention (RTI) as an identification method. (Thank you Dr. Bertina Combs for challenging our thinking and expanding our knowledge of SLD!)
- Our dissertations focused on aspects of Response-To-Intervention/Multi-Tiered System of Support (RTI/MTSS). More specifically, Dr. Stephens studied the use of Curriculum-Based Measurements (CBM) and Dr. Schultz researched the use of MTSS for behavior.
- Much of our post-doctorate work has involved RTI implementation training in Texas and other states. Within this context, we believe RTI is best applied as a service delivery model, and while a useful component of a comprehensive assessment process, it alone is insufficient for identifying SLD.
- Finally, our early research has equally contemplated the importance of professional judgment (Schultz & Stephens, 2009), exclusionary factors (Stephens et al., 2013),



and patterns of strengths and weaknesses (PSW; Schultz, Simpson, & Lynch, 2012).

These, unsurprisingly, have become pillars of the C-SEP model.

In addition our past experiences, we continue to be heavily involved in the profession today: we independently train diagnosticians; we conduct in-house training and refresher courses in numerous schools and districts; and, we actively conduct Full and Individual Evaluations (FIE) throughout Texas. We simultaneously host and present in webinars, publish peer-reviewed articles, and keep abreast of developments within our field. Because we are immersed in the profession, we are familiar with the challenges that contemporary educational diagnosticians encounter (e.g., rapidly rising referral rates, incomplete referral packages, difficulties with dyslexia identification, etc.). We recognize that diagnosticians, and the legal framework and best practices they use, including C-SEP, must meet these challenges. To ensure that C-SEP continues to mature, it is important that we reflect on where we are and where we would like to be in the future.

The purpose of this article is multifaceted. We first review the basics of C-SEP. Thereafter, we discuss the use of C-SEP within the Legal Framework and recent policy guidance. We then dispel common misconceptions concerning the model. We believe “conditions on the ground” (i.e., Corrective Action Plan (TEA, 2018a), COVID-19, recent policy changes) underscore the viability of C-SEP as a versatile and reliable identification model. We close with some projections about where we see C-SEP and the practice of SLD identification in the future.

### **The Basics of C-SEP**

C-SEP is a targeted assessment model that uses a variety of tools and strategies to conduct full and *individualized* SLD evaluations. The model is founded on the premise that the best way to identify SLD is through the integration of multiple sources of data (MSD). MSD includes, among other elements, school history, instructional response data, informal data (Kwaitek & Schultz, 2014), and norm-referenced tests. The data is collected and



analyzed vis-a-vis PSW eligibility criteria using best practices and adherence to the existing Legal Framework. For instance, norm-referenced tests must be administered in accordance with the test publisher's instructions, as stated in the Legal Framework.

In a nutshell, C-SEP is a purposeful, targeted PSW assessment framework that follows a four-step process for SLD. Table 1 outlines each step and provides a description.

**Table 1. The Four Steps of C-SEP**

Steps	Description of Each Step
Review	<p>Collect, organize, and analyze the referral MSD. Any missing data must be collected. The MSD is used to:</p> <ul style="list-style-type: none"> <li>• Establish underachievement.</li> <li>• Establish a student's response to instruction.</li> <li>• Preliminarily identify the emergence of PSW using actual achievement data.</li> <li>• Preliminarily rule out exclusionary factors.</li> <li>• Establish a testing hypothesis.</li> </ul>
Plan	<p>Create a Focused Referral Question (FRQ) from the testing hypothesis. The FRQ should guide the Targeted Testing Plan (TTP). When creating the TTP, the evaluator must determine which achievement areas and/or intellectual development to test based on the review (In short, it should seek to acquire the additional data needed to further identify possible PSW). During this stage, the evaluator should:</p> <ul style="list-style-type: none"> <li>• Establish the FRQ based on the testing hypothesis.</li> <li>• Determine the TTP (based on which achievement and intellectual development areas that need to be tested).</li> <li>• Choose the battery of tests that will serve as the foundation of the formal assessment.</li> <li>• Choose the core tests based on the FRQ and the test publisher's guidance.</li> <li>• Choose the core tests needed to accurately measure intellectual development, achievement, and language abilities.</li> </ul>
Assess	<p>Administer the core tests identified in the TTP. Following test administration, score and conduct the necessary task demands analysis. Test scores should then be merged with all of the previously acquired MSD. After reanalyzing the MSD, it should be decided whether additional selective testing is required to answer the FRQ/and determine eligibility. Should selective testing be deemed necessary, its findings should be incorporated into the accumulation of MSD and reinterpreted.</p>

Steps	Description of Each Step
Decide	Integrate and analyze <i>all</i> of the accumulated data within the Legal Framework to determine whether SLD criteria have been met. An eligibility recommendation is then presented to the Admission, Review and Dismissal (ARD) committee or the Individualized Education Program (IEP) team (for more details, see Schultz and Stephens-Pisecco, 2018; Stephens-Pisecco et al. 2019).

The pillars of C-SEP have endured, as has the model's ability to withstand peer scrutiny and criticism (fair and unfair). Please do not misinterpret this statement, as we recognize our professional and ethical responsibility to clarify and defend our research. Unfortunately, however, the most scathing critiques we have endured are from individuals who decontextualize and misrepresent our work in their bid to delegitimize PSW as a general practice. Among these latter critiques, Fletcher and Miciak (2019) mischaracterized C-SEP as a "discrepancy" model, while Benson et al. (2018) used contextomy and quote mining in an attempt to discredit it. The latter criticism was refuted (Schultz & Stephens, 2018). Despite time and scrutiny, C-SEP remains a compelling model for identifying students suspected of SLD. Equally important, it has gone on to be recognized as a viable method of SLD identification in the *Essential of Specific Learning Disability*, 2nd Edition (Alfonso & Flanagan, 2018). It is similarly represented in textbooks (Dombrowski, 2020) and trade materials (Flanagan, Alfonso, & Dehn, 2020). Combined, C-SEP is proving resilient as an increasing number of school districts and diagnosticians take note of its benefits.

### Contemporary Fluidity in the Assessment Field

Contemporaneous circumstances have placed our field in flux. Texas Education Agency's (TEA) (2018a) Corrective Action Plan, the known and unknown impact of COVID-19 on SLD referrals, TEA's recent guidance regarding SLD identification (Texas Register, 2021), and its single pathway for Dyslexia identification (TEA, 2021b) are forcing a

## C-SEP: From Conceptualization to Contemporary Practice

reconsideration and revision of current practices. To its credit, TEA is adapting its guidance to address these challenges. This section examines their guidance in more detail while demonstrating how these changes are consistent with C-SEP principles and practices. This consistency should give examiners and school districts confidence that C-SEP reflects best practices in assessment, and when used in tandem with TEA guidance, strengthens the Full Individual Evaluation (FIE) process.

We have witnessed a flurry of solid and timely guidance from TEA over the past two years. These adjustments have been, in part, a response to concerns raised in the Corrective Action Plan (CAP, i.e., Child Find, SLD identification) and COVID-19. For example, social distancing requirements, the use of personal protection equipment (PPE) while testing, and reluctance to engage in remote testing, have forced us to rely less on norm-referenced tests and underscored the significance of collecting, incorporating and considering alternative data sources. Simultaneously, we witness a staggering number of students engaged in remote learning as schools prioritized children's physical wellbeing, perhaps at the expense of Child Find efforts. Such circumstances have, and will continue to have, a profound impact on our profession.

Perhaps one of the most significant changes in SLD identification occurred on September 23, 2021, during the Texas Education Agency's State Directors Meeting (TEA, 2021a). At this time, TEA announced that the Legal Framework was going to be updated regarding the PSW model of identification by jettisoning its reference to significant variance. More specifically, it removed this language: "among specific areas of cognitive function such as working memory and verbal comprehension; or between specific areas of cognitive function and achievement." This deleted statement had consistently resulted in misinterpretation of the rules.

Since its inception, C-SEP has promoted using norm-referenced tests in a manner that goes beyond discrepancies and "beyond the scores" (see, for example, Schultz & Stephens-Pisecco, 2018). When the model was first introduced, Schultz and Stephens

(2015) implored diagnosticians “to go beyond standard score analysis and instead interpret and investigate the test and task demand analysis,” integrate and analyze informal data, and to use their professional judgment. Schultz and Stephens (2017) later argued, “simply using individualized norm-referenced tests to obtain scores to run statistical analysis leads to superficial analysis and diminishes the interpretive value of the test.” While we believe norm-referenced tests, and the data obtained from them, are useful and necessary, we have always maintained they should not be singly used to inform decisions. Stated differently, standardized tests alone are not determinative, and should therefore be accompanied by alternative, and equally important, data sources to increase the accuracy of identification.

More recently, Schultz, Rutherford, and Cavitt (2021, p. 105) reiterated:

When assessing intellectual development using a PSW framework such as Core-Selective Evaluation Process (C-SEP), discrepancies and standard scores from norm-referenced testing (NRT) data inform decision-making and professional judgment and are not determinative. In addition, a task demands analysis for each set of scores fully exploit the norm referenced data (Schultz & Stephens-Pisecco, 2018).

In this context, we believe that TEA has wisely removed an oft misinterpreted section from its guidance.

Other contemporary changes within our field have concerned dyslexia identification. These alterations, which have generated some controversy, were implemented in response to the CAP and the publishing of the 2018 Dyslexia Handbook (TEA, 2018a). Recent changes to the Dyslexia Handbook (TEA, 2021b), for example, require using a “single pathway” to identify students suspected of having dyslexia and dysgraphia. Ironically, we have been arguing for this adaptation for several years.

Since C-SEP’s inception, we have advocated “blending and braiding” the dual pathway system of identification (see Schultz, 2018). Moreover, single pathway procedures can be found in the *Core-Selective Evaluation Process: Overview and Procedures* (Stephens-

Pisecco, Schultz, et al., 2019). We have repeatedly maintained that targeted, well-planned testing based on an FRQ, through the integration of selective testing procedures and multiple sources of data, ensures that students with dyslexia, dysgraphia, or related disorders are properly identified and treated (Stephens-Pisecco, 2019; Stephens, et al., 2018). As a consequence, we applaud TEA's decision to make these changes to its standards and protocol.

Additional changes implemented recently that impact our field were introduced in a document published by TEA (2020) entitled *Evaluations Considerations During SY 20-21*. This essay openly (yet indirectly) advocates practices embedded in C-SEP, including its Review, Plan, Assess and Decide steps outlined in one of our earliest publications (see Stephens, Mather, Francis, & Moon, 2017). In the same document, TEA also stresses the importance of professional judgment and using multiple measures during evaluations. In particular, the document argues assessment should be balanced on "necessary versus sufficient" (TEA, 2020, p. 13). It similarly cautions that, "Comprehensive does not mean you formally test everything! It means you must address all the components of the evaluation" (TEA, 2020, p. 11).

Once again, the authors of C-SEP have been advocating this approach and these changes for years. However, while arguing for these adaptations in presentations and trainings, we have received a significant amount of pushback from attending diagnosticians for endorsing these concepts. General dismissal of our proposals in the past most likely originated in our ideas being perceived of as radical concepts or running counter to existing laws and/or norms.

Albeit, when C-SEP was conceptualized, one of our guiding objectives was to create a more efficient and precise method. We followed the Legal Framework to the letter. In fact, it states a "lack of achievement is indicated by performance on multiple measures" and then goes on to list six additional sources of data. We are equally aware that norm-referenced tests of "achievement" have several limitations including: a lack of item density; an inability

to measure the depth and breadth of the curriculum; and, are validated as measurements of cognitive processes when paired with an academic skill and not merely “achievement” (see Schultz et al., 2021; Schultz and Stephens, 2017). Our position has always been that the best way to measure “achievement” is through the use of “actual achievement data (e.g., grades, work samples, TEKS based assessments, curriculum-based measures, etc.).”

Resultantly, we have embedded these dual concepts into C-SEP as distinguishing features of our model (Schultz and Stephens-Pisecco, 2018). More specifically, we have foremost argued that all tests, including core instruments, should be administered in a purposeful and deliberate manner. In our opinion, testing should only be conducted to acquire new or previously unknown information. Thus, we believe that an examiner time should be dedicated to interpreting and integrating MSD as opposed to overly administering testing unnecessarily.

Second, and related to the above, academic underachievement, in our opinion, is best determined using multiple sources of actual achievement data (e.g., curriculum-based assessments, assessments-based on state standards, work samples, classroom data, etc.). In this frame, standard scores obtained from norm-referenced testing should be used to understand the relationship between cognitive and language constructs. At the same time, standard scores of achievement should be interpreted with an understanding of the limitations of norm-referenced achievement measures (i.e., curriculum alignment, item density, score interpretation, normative make-up) (Schultz & Stephens, 2017, p. 151).

The final change impacting on our profession noted herein was introduced in January 2021. During a webinar entitled “*Triangulating Data: Telling a Student’s Story in the Full Individual Evaluation (FIE)*”, a TEA representative provided new guidance to diagnosticians (Vanderhule, 2021). Many of the practices advocated in the webinar are consistent with C-SEP, including the utilization of multiple methods of assessment and a recommendation to use the data to plan instruction (for a comparison, see Schultz, Simpson, et al., 2021; Schultz & Stephens, 2015). TEA’s webinar guidance likewise included examples of when to

use a “task demand analysis” to interpret results, and presented examples of “integrated data analysis.” These latter practices are cornerstones of C-SEP and can be found in our earliest publications (Schultz & Stephens, 2015; Schultz & Stephens, 2017, Schultz & Stephens-Pisecco, 2018).

By way of conclusion, our profession is observing valuable change. At the same time, TEA is adapting its guidance to meet these changes. As articulated above, we have been championing most of these changes for many years in our trainings and publications. Our promotion of these ideas, however, used to be met with skepticism. Nevertheless, our analysis shows that principles embedded in C-SEP are slowly creeping into the standards and protocols that guide the profession that we love. We celebrate these changes, as they improve SLD identification.

The next sections discuss common misconceptions and frequently asked questions concerning C-SEP.

### **Misconceptions and Responses**

Determining the most appropriate method of identifying SLD continues to generate controversy. With the existence of different models and theoretical perspectives, existing dispute of how best to implement local policy, practitioner fear of being confronted with legal process, as well as misleading information found in social media posts about standards and/or existing models, including C-SEP, it is easy to understand how diagnosticians can become uncertain about the best courses of action. This section seeks to dispel some common misperceptions about C-SEP that circulate. We first present the false assumption before providing clarification.

***The goal of C-SEP is to test less and save time.***

*False:* A goal of C-SEP is to be comprehensive, strategic, and deliberate to maximize our testing session through deeper analysis (task demands) and the integration of multiple



sources of data. Within this frame, one of its advantages is that C-SEP is *efficient*, and may in fact save time.

***C-SEP is not "battle-tested" because it has not been the subject of a due process hearing.***

*False:* The method of identification utilized is seldom the primary issue in most legal cases posted (see, Special Education Due Process Hearing Decisions, 2021). Nevertheless, C-SEP requires strict adherence to the Legal Framework and demands publishers' guidelines be followed when administering tests. If examiners adhere to these standards, the methodology utilized, whether C-SEP or otherwise, theoretically should not be the subject of any due process. Moreover, should a C-SEP evaluation and/or its decision be called into question, support can be found in both C-SEP policy, as well as federal and state guidance. In instances where an evaluator fails to follow the existing policy, they accept full responsibility for their error, regardless of the methodology they selected to utilize.

***C-SEP is only useful when using the Woodcock Johnson IV Batteries of Tests.***

*False:* Major norm-referenced tests of cognition, language, and achievement include a core set of tests, as well as supplemental tests designed for deeper probing. Hence, Woodcock Johnson IV (WJ IV) is not the only battery that can be used with C-SEP. The confusion partly lies in the lexicon used by the publishers. WJ IV battery of tests, for instance, just happen to use "core" to describe the set of tests that provide the most coverage of a construct (e.g., intelligence, language, achievement), and use the term "selective" to describe additional tests that the examiner may use for deeper assessment. By comparison, the WISC IV uses language such as Full Scale or Primary to describe its "core" tests and Ancillary or Complimentary to describe its "selective" tests. Regardless of which battery you select, be certain to read publisher guidance when selecting a "core" or "primary" set of

tests, which can generally be found in the publisher's manual. Moreover, when selecting core tests, publisher guidance and the referral question should be considered.

***C-SEP is just another "discrepancy" model, very similar to other models.***

*False:* While all SLD models share certain similarities, C-SEP has unique features that distinguish it from other models (see Schultz & Stephens-Pisecco, 2018). These include an elevation of oral language, going beyond standard score analysis (i.e., task demands analysis, curriculum-based measures), using actual achievement data to assess "lack of adequate achievement," targeted ruling out of exclusionary factors, and the identification of emerging PSW through a comprehensive analysis of MSD and formal test results. These characteristics set C-SEP apart from other discrepancy models.

***C-SEP is a testing model, not an assessment model.***

*False:* However, to understand this distinction, it is important to first differentiate between "testing" and "assessment". *Testing* is defined as administering tests to obtain scores. *Assessment*, by comparison, indicates a broad evaluation is conducted. When we assess, we collect and analyze multiple sources of data, of which testing is one component. Within this context, C-SEP is an assessment model that goes beyond testing. Within the C-SEP framework, norm-referenced tests are one of a "variety of assessment tools and strategies" used. In addition to conducting formal testing, we simultaneously advocate additional data be collected, including informal data (e.g., actual achievement data, curriculum-based measures, school history, and the ruling out of exclusionary factors). C-SEP is therefore aligned with the Legal Framework and we recognize that the data collection and analyzed for SLD identification has more to do with informal sources than norm-referenced resources. In fact, norm-referenced tests are only mentioned once in the framework.

Subsequent to addressing five of the common misconceptions we have observed, we turn our attention to answering questions that are commonly posed.

### Frequently Asked Questions

Since 2016, we have fielded innumerable questions about C-SEP. Many inquiries pertain to how the model is designed and is most efficiently operationalized. We would like to present three of the most popular questions we receive and provide answers. It is hoped that by doing this, we can clarify our position to both seasoned veterans and curious newcomers alike.

**Question:** Is there an “otherwise normal profile” condition to be met or does a student need an average FSIQ overall?

**Explanation:** The expression, “otherwise normal ability profile” as described by Flanagan, Ortiz, & Alfonso (2013), identifies a student that has areas of strengths at or above the average range, along with a specific area or areas of processing weakness. The profile is determined using a g-value “which indicates the likelihood that the individual has at least average overall ability to think and reason” (Flanagan, Ortiz, & Alfonso, 2013, p.272). This metric is based on a cognitive standard score derived from a formula within XBASS (see Flanagan, Ortiz, & Alfonso, 2013). Within this frame, a student that exhibits strengths in some areas of achievement has demonstrated their overall ability to “think and reason.” If a student has a specific learning disability, then, by definition, they must have specific learning *abilities*, or a PSW.

C-SEP comprehensively assesses SLD, going beyond cognitive explanations for “unexpected underachievement.” Through the collection and analysis of multiple sources of data, we can determine if a student’s learning difficulties are “specific,” or not “general” or *unexpected*. To provide further clarification, here are some factors to consider when

evaluating a student. The data below are presented in juxtaposition with relevant Texas law (19 Tex. Admin. Code § 89.1040(2021)).

During our evaluation of a student:

- 1.** We would *expect* a child who has been provided appropriate instruction, delivered by qualified personnel, in reading/and or math to *achieve*. To *not achieve* in this instance is unexpected. (Appropriate instruction means that most of the students in that setting are achieving, generally <80%). Within this context, remember that “instructional response” is part of SLD identification and must be considered as a valuable piece of evidence.
- 2.** We would *expect* a child who was provided appropriate, intense instruction in reading/and or math via RTI, tutoring, or other pre-referral interventions, delivered by qualified personnel, to *achieve*. To *not achieve* is *unexpected* (appropriate instruction in Tier 2, 3 settings are deemed adequate if the student demonstrates reasonable progress (see Guidance Document)). Once again, “instructional response” is a component of identification and the non-responsiveness to intense instruction is a marker for SLD.
- 3.** We discriminate between general learning difficulties and specific learning disabilities; this is where the concept of PSW enters.
  - a.** We would *expect* a child who struggles with all academic subjects, has cognitive processes in the same range (e.g., below average), struggles with language, and shows no significant variation in abilities (pervasive weakness) to not perform adequately. This is *expected underachievement*. In such instances, we should consider alternate explanations beyond SLD to explain why a child experiencing this pattern.
  - b.** We *expect* a child who is able to communicate adequately (language) and is able to perform certain skills well, such as in math (showing ability to think and reason quantitatively), should be able to achieve in other areas such as

reading. If they can do some things well, but underachieve in other areas, this describes *unexpected underachievement*. This profile is consistent with SLD.

4. In instances where *unexpected achievement* manifests, consider the following:
  - a. We need to distinguish SLD from Intellectual Disabilities (ID). We would expect a child with a 70 FSIQ to underachieve. This would be *expected underachievement*.
  - b. We would EXPECT a child who missed 20% of school (Exclusionary Factor) to *underachieve*.
  - c. We need to be careful with how we use and interpret scores. A fatal flaw of the old IQ-Achievement discrepancy model was the use of Global Scores such as FSIQ and GIA. Due to the nature of SLD (significant variance in scores: PSW), global scores are not the best estimate of “overall functioning” for students with SLD due to the variance (pattern of strengths and weaknesses). Therefore, FSIQ is not an appropriate diagnostic marker of SLD, thus an analysis of the profile of scores will provide more useful information when corroborated by multiple data sources.
  - d. We must consider other factors beyond cognitive standard scores. When determining unexpected underachievement using C-SEP, the evaluator must examine factors other than cognitive standard scores. This requires collecting and analyzing instructional/treatment responses, language, exclusionary factors, strengths, and so forth.

As the reader can observe, there is a clear process evaluators can use to determining the existence of a PSW. C-SEP is designed to help diagnosticians make these determinations through the collection and interpretation of data within the confines of existing law.

**Question:** Traditional practices demand we administer many more tests than C-SEP requires. Aren't we expected to administer at least two tests per ability?

**Explanation:** The short answer is no. However, every ability assessed (e.g., reading, memory, oral language) should be supported by multiple data sources and corroborating evidence. For instance, if you give a core set of tests, you will acquire composite scores, and this data can be analyzed in diverse ways using the interpretive options provided by the test publisher. Additional corroborating data can be found in the task demands analysis.

To illustrate, the Coding test in the WISC V and a Math Facts Fluency test are both measures of processing speed (Gs) under two different conditions. Hence, these are two separate tests that measure the same construct. Another example is an Oral Comprehension and a Reading Comprehension test, both of which measure comprehension knowledge (Gc) and verbal reasoning, a fluid reasoning (Gf) task. Further source of corroborating data can be acquired through informal data, which should always be used to support norm-referenced scores. If, however, you want to further explore a specific ability, use selective testing to enhance your data. Test publishers usually provide guidance on which tests to administer to measure specific constructs.

Finally, keep in mind that C-SEP requires any low scores on norm-referenced testing be followed-up with supporting data to more broadly assess an ability. This can be acquired through the administration of additional testing and/or through the collection of other MSD. Regardless of which data is collected and analyzed, it should be specifically related to the referral question.

**Question:** If a student is tested for speech, do I still need to test language?

**Explanation:** Language is critical when assessing students suspected of having an SLD. In our opinion, however, it is redundant for a speech pathologist and a diagnostician to conduct duplicate tests that measure the same set of traits. Consequently, we recommend diagnosticians use the Review and Planning steps of C-SEP to collaborate with your speech pathologist to formulate a testing plan for the student based on the referral question. During collaboration, participants can agree on which tests should be administered and who

will administer them. Thereafter, the educational diagnostician and speech pathologist should come together again to share their expertise and interpret testing results during the decision step of C-SEP. This collaborative approach across professions saves time, reduces redundancy, provides valuable insight into student learning, and is beneficial to the creation of measures designed to better serve the child being assessed.

We would like to close our discussion on this question by emphasizing the importance of language in SLD identification. In fact, guidelines require we be “comprehensive” in our FIE. For this reason, we argue that one cannot assess SLD without assessing language. In fact, we argue that:

Expressive (Oral Expression) and Receptive Language (Listening Comprehension) [should be] formally tested and considered with every evaluation. These results [should then be] compared with cognitive measures, academic measures, and classroom functioning. In addition to providing diagnostic information, language assessment also provides insight into teaching and learning (Schultz and Stephens-Pisecco, 2018, p. 151).

Similarly, we have equally suggested:

The imperfect ability to listen, think, or speak are salient features of the SLD definition and are critical assessment areas when identifying a PSW and the instructional implications of a student’s profile (Schultz and Stephens-Pisecco, 2018, p. 151).

Combined, it is clear that language is a fundamental component of a C-SEP evaluation. This is one of the unique characteristics that set our model apart from the other SLD identification models.

We close this article with some lessons learned over the past six years of training. Then we will share which improvements we would like occur in SLD identification in the future.

### **What We've Learned and What Should Change**

We close this essay with a look at what we have learned from the past before articulating changes we would like to see in the future. Experience has shown us that the two are interconnected. Nonetheless, we should persistently strive to improve our profession for the benefit of all stakeholders.

### ***Lessons Learned***

While change is difficult, it is both possible and necessary. Some individuals embrace change while others resist. We have learned from our experience that one of the best ways of managing “resistance” is by securing trust and converting this into “buy-in.” We have found that when C-SEP is clearly explained and appropriately trained, user competence and confidence increases. These users then go on to advocate its use to their colleagues and friends. It is this process that helps stimulate positive developments in our field.

Related to the above, we have also observed that many only reluctantly part with “traditional” practices. This, too, is a normal and expected response. Unfortunately, rootedness can hinder progress. For instance, we often we train diagnosticians in new practices, yet the participants will invariably incorporate the new knowledge into their traditional practices because they are familiar and comfortable with the old. The result can be an inappropriate blending of C-SEP with other methods, where examiners try to utilize “new” knowledge in an “old” framework. As a consequence, we initially recommend “ongoing” training and coaching until the older traditions are finally dislodged and the diagnostician/district can move forward with C-SEP.

Another lesson we have learned is that diagnosticians today are struggling with profound issues that have yet to be addressed. For instance, over the years, we have persistently heard that “good” referrals are hard to find. We too are aware of this problem from our own experienced as practicing diagnosticians. This line of complaint usually follows



one of two paths. On the one hand, evaluators consistently report they receive referrals with missing or incomplete data. As a result, evaluators have to spend countless hours collecting data that should be staples of a solid referral packet. Unfortunately, in some cases, diagnosticians admit to moving forward with the assessment process without all the required data, simply because they simply do not have the time.

On the other hand, diagnosticians are receiving vague or broad referral question. That has generated a “kitchen sink” approach to testing, where more tests are administered than would normally be required if an FRQ were utilized. Stated differently, diagnosticians are translating their vague referrals into carpet-bomb testing. We believe that more needs to be done to significantly improve the quality of referral packets and reverse the two trends outlined above. C-SEP, as with all other methods of identification for that matter, are best implemented when applied to a strong referral packet that contains sufficient data to focus the scope of the evaluation. We are also aware that certain data should be incorporated into all referrals, and that this data is often more easily acquired by referral committee members than diagnosticians (e.g., classwork samples, informal test results).

We wish to close this subsection noting that oftentimes it feels that diagnosticians are underappreciated. That we have come to realize how unappreciated you sometimes feel is unfortunate. After all, we are fully aware that Texas educational diagnosticians and school psychologists are competent, well educated, and passionate about students with disabilities. Despite their staggering caseloads and continuously being challenged over their data-supported findings, they persist in their adherence to increasing regulations and follow industry best practices. At the same time, they attend ARD meetings and continuously engage in professional development to remain up-to-date in their profession. We can honestly say that we feel very privileged to have worked with so many dedicated and professional educational diagnosticians during our C-SEP trainings. It is our hope that your schools and districts (come to) recognize your hard work, professionalism, and dedication.

### ***Future Direction***

As we reflect on the lessons we have learned over the past 6 years, we do so in the knowledge that our profession is in the midst of ongoing change. Sometimes these transformations have slowly manifested over time, while at other times they have seemingly appeared overnight (e.g., single pathway of dyslexia, changes to Legal Framework). Catalysts for the contemporary changes we are witnessing include the continued fallout from COVID-19 as well as mandates stemming from the CAP. Despite the facilitators or the changes they generate, we continue to be steadfast and confident that the C-SEP model is a viable method of conducting a full and individual evaluation. It continues to withstand the adaptations being introduced, and we suspect that it will continue to perform well.

Nevertheless, we believe that several elements within our profession require further improvement. However, the changes we recommend below are only possible if our educational colleagues collaborate. The changes outlined, we believe, would benefit our schools and profession.

1. Increased efforts need to be made to improve MTSS. We believe it is necessary to establish systems that measure “instructional response” and are able to generate formative data that not only meets the Legal Framework of “data-based documentation”, but also results in the creation of an FRQ prior to referral.
2. Education preparation and professional development programs should offer graduate level training that provides a deeper understanding of the constructs we measure (e.g., reading, writing processes, language development, intellectual development, learning theory). This training would help us become better evaluators and data interpreters.
3. Increased professional development for general education is needed to enhance our collective interest of identifying SLD. For example, we believe general education teachers should be trained in practices such as informal data collection, using the student data review guide (SDRG) provided by the TEA Child Find Network (2019)

(<https://childfindtx.tea.texas.gov/ref-sped-1.html>), and data-based decision making for referral decisions. We are certain that such training would contribute to a much-required improvement in the quality of referrals, which would benefit all relevant stakeholders (student, teacher, diagnostician).

4. We must persist in our collective effort to create a unified system of dyslexia identification. Implementation of the single pathway policy has introduced an opportune time for us to find more consistency in how we understand and assess dyslexia. One serious concern here is the use (or misuse) of global scores, such as the FSIQ and the use of the *Kauffman Brief Intelligence Test-2* (KBIT-2). Some districts use these measures as a criterion to disqualify a student as having dyslexia. We feel adhering to all guidance documents, establishing a common language, and sharing a set of best practices would bring uniformity and standardization to the process. Simultaneously, as presented above, C-SEP would be a valuable tool as it adheres to the single pathway policy established by TEA.
5. The referral and assessment processes need to be streamline through the utilization of a *Collaborative Assessment Model* (CAM) (Stephens, Rueter, & Woodbury, 2021). Within this model, an evaluator would function as a consultant to student problem-solving teams, and thereby is able to ensure appropriate data is gathered and interpreted early in the process. Our present siloed systems are outdated and inefficient. Both general educators and special educators would mutually benefit from collaboration, and would thereby ensure all students have the possibility to succeed thanks to their receiving appropriate instruction.

The five recommendations noted above are but some of the most pressing of issues our profession faces. Nevertheless, we should unite in our quest to improve our process of identifying and supporting students with SLD.

### **Conclusion**

There are many PSW models, but the C-SEP model is the only 3<sup>rd</sup> method approach that is not dependent on score discrepancies when establishing patterns of strengths and weaknesses. As demonstrated above, C-SEP is aligned to the new TEA guidance for SLD identification (TEA; 2021). Combined, C-SEP is a comprehensive PSW model that balances the use of MSD and norm-referenced testing results. Unlike other models that establish PSW through score discrepancies, PSW emerges through the integration of MSD, to include norm-referenced test results, in the C-SEP model. It is driven by MSD, which are used to create a targeted testing plan. Amongst its other benefits, the model allows educational diagnosticians to draw on their classroom teaching experience, knowledge of the learning process, understanding of the importance of language for learning, understanding of cognitive processes and their impact on learning, and the importance of ruling out exclusionary factors as being the primary cause of struggle when assessing each student. When implemented correctly, the C-SEP model and its processes adhere to the norms that govern our profession, as well as relevant Federal and State laws and guidelines.

## References

- Alfonso, V.C., & Flanaga, D.P. (2018). *Essentials of Specific Learning Disability Identification*. 2<sup>nd</sup> Edition. New York: Wiley.
- Benson, N.F., Beujean, N., McGill, R. J., & Dombrowski, S.C. (2018). Critique of the Core-Selective Evaluation Process. *The DiaLog* 47(2), 14-18.
- Dobrowsky, S.C. (Ed). (2020). *Psychoeducational Assessment and Report Writing*. 2<sup>nd</sup> Edition. Springer Nature Switzerland.
- Flanagan, D.P., Alfonso, V.C., & Dehn, M. (2020). *Using the Pattern of Strengths and Weaknesses Method to Identify Specific Learning Disabilities*. Pamphlet. School House Educational Services.
- Flanagan, D.P., Ortiz, S.O., Alfonso, V.C. (2013). *Essentials of Cross-Battery Assessment*. 3<sup>rd</sup> Edition. New York: Wiley.
- Fletcher, J.M., & Miciak, J. (2019). *The Identification of Specific Learning Disabilities: A Summary of Research on Best Practices*. Austin, TX: Meadows Center for Preventing Educational Risk.
- Individuals with Disabilities Education Improvement Act of 2004 (IDEA), Pub L. No. 102-446, 118 Stat. 2647 (2004).
- Kwaitek, R.B., & Schultz, E.K. (2014). Using Informal Assessment Data to Support the Diagnosis of Specific Learning Disability. *The DiaLog* 43(1), 12-16.
- Schultz, E.K. (2018). *Corrective action plan and C-SEP: The perfect storm*.  
[https://csep.online/documents/issue\\_2.article\\_2.pdf](https://csep.online/documents/issue_2.article_2.pdf)
- Schultz, E.K., Rutherford, E., & Cavitt, D., (2021). Intellectual Development and Specific Learning Disability: The Role of Norm-Referenced Tests. *Special Education Research, Policy & Practice*, Fall 2021.
- Schultz, E.K., & Stephens-Pisecco, T.L. (2018). Exposing Educational Propaganda: A Response to Benson et al. (2018) "Critique" of C-SEP. *The DiaLog* 48(1), 10-16.
- Schultz, E.K., & Stephens, T.L. (2017). Using the Core-Selective Evaluation Process (C-

## C-SEP: From Conceptualization to Contemporary Practice

- SEP) to Identify a Pattern of Strengths and Weaknesses. *The DiaLog* 46(1), 9-15.
- Schultz, E.K., & Stephens, T.L. (2015). Core-Selective Evaluation Process: An Efficient & Comprehensive Approach to Identify Students with SLD Using the WJ IV. *The DiaLog* 44(2), 5-12.
- Schultz, E.K., Simpson, C.G., & Lynch, S. (2012). Specific Learning Disability Identification: What Constitutes a Pattern of Strengths and Weaknesses? *Learning Disabilities* 18(2), 87-95.
- Schultz, E K., & Stephens, T.L. (2009). Utilizing Professional Judgment within the SLD Eligibility Determination Process: Guidelines for Educational Diagnosticians and ARD Committee Members. *The DiaLog* 38, 3-6.
- Schultz, E.K., & Stephens-Pisecco, T.L. (2018). Using the Core-Selective Evaluation Process to identify a PSW: Integrating Research, Practice, and Policy, *Special Education Research, Policy & Practice*, Fall 2018
- Special Education Due Process Hearing Decisions (2021). Case Hearings 2010-2021. Texas Education Agency. Austin, TX. <https://tea.texas.gov/about-tea/government-relations-and-legal/special-education-hearings/due-process-hearings/special-education-due-process-hearing-decisions>
- Stephens, T.L. (2019). Integrating the WJIV Tests into a Comprehensive Dyslexia Evaluation. *The DiaLog*, 48 (2), 12-15.
- Stephens, T.L., Dykes, F., Proctor, C., Moon, G., Gardner, R., & Pethick, L. (2013). Ruling Out Exclusionary Factors Through the Utilization of a Response-to-Intervention (RTI) Model. *The DiaLog* 42(1), 5-14.
- Stephens, T.L., Mather, N., Francis, C., & Mood, G. (2017). Using the Core-Selective Evaluation Process (C-SEP) with the Woodcock Johnson IV: From Theory to Practice. Woodcock-Johnson Assessment Service Bulletin, No. 11. Itasca, IL: Riverside.
- Stephens, T.L., Rueter, J., & Woodbury, C. (2021). *Tearing down the Silos: Streamlining the referral to assessment process*. Beyond the Score Webinar.

## C-SEP: From Conceptualization to Contemporary Practice

- Stephens-Pisecco, T.L., Schultz, E.K., Moon, G., & Holman, S. (2019). *Core-selective evaluation process: Overview and procedures*; Dragonfly Press.
- Texas Administration Code (TAC) .19 Tex. Admin. Code § 89.1040 (2021)
- Texas Education Agency (TEA). (2021a). Special Education Director Webinar. September 23, 2021. Austin, TX: Texas Education Agency.  
<https://www.youtube.com/watch?v=zIOpBFxxA34>
- Texas Education Agency (TEA). (2021b). Updates to Dyslexia Handbook: Procedures Concerning Dyslexia and Related Disorders. Austin, TX: Texas Education Agency.  
[https://tea.texas.gov/sites/default/files/updates-to-dyslexia-handbook-procedures-concerning-dyslexia-and-related-disorders-dyslexia-handbook\\_0.pdf](https://tea.texas.gov/sites/default/files/updates-to-dyslexia-handbook-procedures-concerning-dyslexia-and-related-disorders-dyslexia-handbook_0.pdf)
- Texas Education Agency (TEA). (2020). *Evaluations Considerations During SY 20-21*. Austin, TX. TEA.  
<https://tea.texas.gov/sites/default/files/EvaluationConsiderationsduringSY20-21.pdf>
- Texas Education Agency (TEA) Child Find Network. (2019). Student Data Review Guide Tools. Austin, TX. <https://childfindtx.tea.texas.gov/ref-sped-1.html>
- Texas Education Agency (TEA). (2018a). *Action Required: Special Education Corrective Action Response Requirements and Timelines*. Austin, TX.  
<https://tea.texas.gov/about-tea/news-and-multimedia/correspondence/taa-letters/action-required-special-education-corrective-action-response-requirements-and-timelines>
- Texas Education Agency (TEA). (2018b). The Dyslexia Handbook: Procedures Concerning Dyslexia and Related Disorders. Austin, TX: Texas Education Agency.
- Texas Register. (October 1, 2021). 46 TexReg 6534. Adopted Rules.  
<https://www.sos.state.tx.us/texreg/pdf/backview/1001/1001adop.pdf>
- Vanderhule, D. (January 21, 2021). *Triangulating Data: Telling a Student's Story in the Full Individual Evaluation (FIE)* Webinar. Texas Education Agency. Austin, TX.  
<https://childfindtx.tea.texas.gov/recorded%20sessions.html>