

## SBTAM

# Team Starter Kit

*A Practical Guide to Building Your School Behavioral Threat Assessment & Management Team*

Provided by SBTAM.com | School Safety Through Proactive Identification

This kit provides everything your district needs to stand up a compliant, effective SBTAM team — role definitions, a 30-day quick-start plan, meeting agenda templates, and documentation forms.

## What Is the SBTAM Team?

The SBTAM (School Behavior Threat Assessment and Management) team is the multidisciplinary group responsible for identifying, assessing, and supporting students who may be at risk — before a crisis occurs. HB 268 and national best practice both require schools to have a formally appointed, trained team.

This guide gives you the operational framework to build that team and keep it running effectively.

## Core Team Roles & Responsibilities

Every SBTAM team requires at minimum four core roles. Larger districts may expand the team, but these four are mandatory:

<b>SBTAM Coordinator / Administrator</b>	
<b>Primary Responsibilities</b>	Chairs team meetings · Manages case assignments · Ensures documentation compliance · Communicates with district leadership · Serves as point of contact for community referrals
<b>Qualifications</b>	School principal, AP, or district administrator with safety training

<b>Time Commitment</b>	2–4 hours/week during active cases; 1 hour/week maintenance
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<b>School Counselor</b>	
<b>Primary Responsibilities</b>	Conducts initial student wellness conversations · Develops Wellness Plans · Coordinates mental health referrals · Maintains ongoing check-ins with identified students
<b>Qualifications</b>	Licensed school counselor; SBTAM framework training recommended
<b>Time Commitment</b>	3–6 hours/week during active caseload

<b>School Resource Officer (SRO)</b>	
<b>Primary Responsibilities</b>	Provides law enforcement perspective · Assesses threat credibility · Coordinates with local agencies when needed · Reviews weapon access concerns
<b>Qualifications</b>	Certified SRO with threat assessment training preferred
<b>Time Commitment</b>	1–2 hours/week; on-call for urgent cases

<b>Mental Health Lead / Clinician</b>	
<b>Primary Responsibilities</b>	Conducts clinical risk assessments (SRA/BTA review) · Develops Safety Plans for Tier 3 students · Provides consultation to the team · Coordinates with outside providers
<b>Qualifications</b>	Licensed mental health professional (LPC, LCSW, psychologist)
<b>Time Commitment</b>	2–5 hours/week; varies with active caseload

## Your First 30 Days: Quick-Start Checklist

Complete these steps in order to stand up your SBTAM team.

Done	Action	Owner
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<input type="checkbox"/>	Appoint SBTAM Coordinator (formal designation in writing)	Superintendent / Principal
<input type="checkbox"/>	Identify and invite core team members (Counselor, SRO, Mental Health Lead)	SBTAM Coordinator
<input type="checkbox"/>	Hold Kickoff Meeting — review this guide, assign roles, set meeting schedule	SBTAM Coordinator
<input type="checkbox"/>	Download and review FOCUS Screener overview at sbtam.com	Full Team
<input type="checkbox"/>	Schedule first FOCUS screening window (target: within 60 days)	SBTAM Coordinator
<input type="checkbox"/>	Set up case documentation system (shared folder, secure drive)	Administrator
<input type="checkbox"/>	Brief school staff on SBTAM — who we are, what we do, how to refer	SBTAM Coordinator
<input type="checkbox"/>	Review NTAC Investigative Checklist (download at sbtam.com)	Full Team
<input type="checkbox"/>	Establish communication protocol for urgent flags (24-hour response)	Full Team
<input type="checkbox"/>	Schedule first monthly team meeting on calendar	SBTAM Coordinator

## Monthly Team Meeting Agenda Template

Use this template for your regular SBTAM team meetings. Recommended cadence: monthly minimum, bi-weekly during active caseload.

SBTAM Team Meeting   [Date]   [School Name]
1. Attendance & Quorum Check (5 min) — confirm all core members present
2. Case Status Review (20 min) — brief update on each open case: student status, plan adherence, any changes in risk level
3. New Flags Review (15 min) — review any new FOCUS flags or referrals since last meeting; assign counselor for initial contact
4. Closed Cases (5 min) — formally close cases where support plans are complete and risk has resolved
5. Process Issues / Team Needs (10 min) — discuss documentation concerns, training needs, resource gaps

## 6. Next Meeting Date Confirmed — before adjourning

Meeting Recorder: \_\_\_\_\_ Next Meeting: \_\_\_\_\_

**Case Summary Documentation Form**

Complete one form per student case. Maintain in your secure SBTAM case file. This document is a confidential student record.

<b>SBTAM CASE SUMMARY</b>	
Student Name (Last, First): _____	Grade: _____
Date Opened: _____	
Referral Source: <input type="checkbox"/> FOCUS Flag <input type="checkbox"/> Staff Referral <input type="checkbox"/> Peer Report <input type="checkbox"/> Direct Disclosure <input type="checkbox"/> Other: _____	
Assigned Counselor: _____	SRO Involved: <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Initial Assessment</b>	
Risk Tier Assigned: <input type="checkbox"/> Tier 1 (Low) <input type="checkbox"/> Tier 2 (Moderate) <input type="checkbox"/> Tier 3 (High/Elevated)	
Primary Concern: <input type="checkbox"/> Self-Harm <input type="checkbox"/> Violence Toward Others <input type="checkbox"/> Emotional/Behavioral <input type="checkbox"/> Other	
Summary of Concern (attach FOCUS results if applicable): _____	
<b>Intervention Plan</b>	
Plan Type: <input type="checkbox"/> Wellness Plan <input type="checkbox"/> Safety Plan <input type="checkbox"/> Referral Only	
Actions Taken: _____	
Parent/Guardian Contacted: <input type="checkbox"/> Yes <input type="checkbox"/> No	Date: _____ Method: _____
Outside Referral Made: <input type="checkbox"/> Yes <input type="checkbox"/> No Agency: _____	
<b>Follow-Up</b>	
Next Check-In Date: _____	Responsible Team Member: _____
Case Status: <input type="checkbox"/> Active <input type="checkbox"/> Monitoring <input type="checkbox"/> Closed Date Closed: _____	
Team Signatures: _____	

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## Ready to activate your SBTAM team with data?

Schedule a free FOCUS Screener demonstration at [sbtam.com](https://sbtam.com). The screener is the data engine that gives your team something to act on.

**[sbtam.com](https://sbtam.com)**

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