North Carolina Infant Toddler Program
Early Intervention Section
Division of Child and Family Well-Being
North Carolina Department of Health and Human Services
1916 Mail Service Center
Raleigh, North Carolina 27699-1916

The North Carolina Infant Toddler Program Coaching and Natural Learning Environment Practices Toolkit
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Electronic versions of this tool kit are available from the following website:
https://beearly.nc.gov/index.php/providers/training
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Preface (English)

Working Together to Support Children’s Learning and Development

As a parent, you are the expert about your child and have the most impact on his/her development. That is the foundation of the work we do in the N.C. Infant-Toddler Program (ITP).

We provide services for your child in places and in ways that your child and family typically spend time, such as in your home, at a childcare center or during mealtimes.

Professionals who work with the ITP through the Children’s Developmental Services Agency (CDSA) will guide you on how to use your family’s everyday activities to help your child learn and develop through your interactions.

The CDSA staff and its providers use coaching to help you and other caregivers support your child’s learning and development.

Plan
At the beginning of each visit, you and your provider will talk about what has happened between visits. Let your provider know what you’ve tried and what has and hasn’t worked for your family. Share anything that’s new or that’s changed with your child or your family’s situation. On your first visit, you will develop a plan with your provider. You will review that plan and your family’s progress during future visits.

Observe
Your provider may ask to watch how you and your child play and interact. Through this observation, the provider may ask to show you a new strategy to help support your child’s development.

Practice
Then it’s your turn. Your provider may ask you to practice the strategies you’ve been shown. Together, you’ll practice new ways to achieve the results you want for your child and your family using everyday routines and activities.

Reflect
You and your provider will talk about the strategies you’ve tried during this visit. You’ll discuss why you think the strategies did or didn’t work. Together you’ll build on this knowledge to achieve the outcomes you’ve set for your child and family.

Feedback
You’ll receive feedback and information from your provider as you work together to identify the best strategies for your family.

Plan
At the end of your visit, your provider will help you develop your plan of what you’ll try between visits. Then you’ll schedule your next time together and talk about what you’ll work on during that visit.
Preface (Spanish)

Trabajamos juntos para fomentar el aprendizaje y el desarrollo de los niños

Usted, como madre o padre, es quien más conoce a su hijo/a y quien ejerce el mayor impacto en su desarrollo. Esta premisa es la base sobre la que se apoya nuestro trabajo en el Programa de Infantes Menores de Tres Años (ITP, por sus siglas en inglés) de Carolina del Norte.

Proporcionamos servicios que se adaptan a los lugares donde su hijo/a y su familia suelen pasar más tiempo, como en la casa o en la guardería, y que se ajustan a las rutinas, por ejemplo, durante las comidas.

Los profesionales que trabajan en el programa ITP a través de la Agencia de Servicios para el Desarrollo del Niño (CDSA, por sus siglas en inglés) le enseñarán a usar las actividades cotidianas de la familia para fomentar el aprendizaje y el desarrollo de su hijo/a a través de las interacciones.

El personal de CDSA y sus proveedores dan orientación para ayudarle a usted y a otros cuidadores a fomentar el aprendizaje y el desarrollo de su hijo/a.

Planificación
Al comienzo de cada consulta, usted y su proveedor hablarán sobre las situaciones que se han presentado entre una consulta y otra. Hágale saber al proveedor qué estrategias ha intentado implementar, cuáles han funcionado y cuáles no con su familia. Comparta cualquier situación nueva o que haya cambiado con su hijo/a o su familia. En su primera consulta, desarrollará un plan con la ayuda del proveedor. Usted revisará ese plan y el progreso de su familia en las consultas posteriores.

Observación
Es posible que el proveedor le solicite que observe la forma en que usted y su hijo/a juegan e interactúan. A través de esta observación, el proveedor podrá mostrarle una nueva estrategia que contribuya al desarrollo de su hijo/a.

Práctica
Ahora es su turno. El proveedor le pedirá que practique las estrategias que le ha expuesto. Juntos practicarán otros métodos para lograr los resultados que desea para su hijo/a y su familia usando rutinas y actividades cotidianas.

Reflexión
Durante esta consulta, usted y el proveedor discutirán las estrategias que ha utilizado. Analizará por qué cree que las estrategias sirvieron o no. Juntos utilizarán esta información para hacer las modificaciones necesarias y alcanzar los resultados que ha establecido para su hijo/a y su familia.

Retroalimentación
Recibirá comentarios e información del proveedor durante el tiempo que trabajen juntos para identificar los mejores estrategias para su familia.

Planificación
Al final de la consulta, el proveedor le ayudará a desarrollar un plan de estrategias que usted deberá implementar entre una consulta y otra. Luego, programarán una próxima consulta y decidirán sobre los temas que tratarán en ella.

NC Departamento de Salud y Servicios Humanos de Carolina del Norte • División del Bienestar Infantil y Familiar • Sección de Intervención Temprana • www.ncdhhs.gov • www.beautilync.gov • NCCHE: es un empleador y proveedor que apoya la igualdad de oportunidades. ©2021, NC\22
**CDSA Staff Instructions:**

**Using the NC ITP Coaching & NLEP Toolkit**

**CDSA Staff Coaching Training Process:** Use this as a guide with your supervisor to identify your pathway to proficiency.

**REQUIREMENTS FOR CDSA Staff**

1. **Initial Coaching Training (choose one):**
   - a. **Complete all 3 FIPP webinars** (Sexton, Hansen, Shelden, & Rush, 2016a, b, c) with at least 80% proficiency ($79.95 for access for one person for one full year) **OR**
   - b. **Read The Early Childhood Coaching Handbook, 2nd Ed.** (Rush & Sheldon, 2020) (approximately $34 on Amazon) and score at least 80% on quiz.

2. **Putting It into Practice training:** A 6-hour training that will build on the skills obtained from the webinars (Sexton, Hansen, Shelden, & Rush, 2016a, b, c) or from reading The Early Childhood Coaching Handbook, 2nd Ed. (Rush & Sheldon, 2020). This training will provide you the opportunity to practice coaching and receive valuable feedback. The training will also explore and discuss natural learning environment practices. This training will be offered at least quarterly in various locations throughout the state.

3. **Proficiency Tools:** Choose one or more of the following to achieve proficiency:
   - a. **Coaching Logs:** The Coaching Log is a tool that may be used to analyze a single coaching conversation by a person who is learning the coaching process and someone who has more experience coaching (i.e., a supervisor, mentor, or colleague) (Rush & Shelden, 2011).
     - **AND/OR**
   - b. **Self-Assessment/Observation Tools:** There are multiple tools to select from in order to complete either Self-Assessment or to use as an Observation Tool by an Approved Observer (see training process).
     - i. Coaching Proficiency Checklist
     - ii. Routines Based Intervention Action Checklist
     - iii. Self-Reflection Tool for Service Coordinators
     - iv. Fidelity in Practice for Early Intervention (FIPEI) (FIPP Training required for use)
     - v. Fidelity in Practice Mentor Coaching Tool (FIPP Training required for use)

4. **Handouts, Coaching Group Guides, and Video Resources:** This identifies helpful handouts and videos that can be used to familiarize staff with self-assessment/observation tools, along with the practices.
CDSA Community Provider Instructions:
Using the NC ITP Coaching & NLEP Toolkit

**CDSA Community Provider Coaching Training Process:** Use this as a guide to identify your pathway to proficiency.

**REQUIREMENTS FOR PROVIDERS**

1. **Initial Coaching Training (choose one):**
   a. Complete all 3 FIPP webinars (Sexton, Hansen, Shelden, & Rush, 2016a, b, c) with at least 80% proficiency ($79.95 for access for one person for one full year)
   OR
   b. Read *The Early Childhood Coaching Handbook, 2nd. Ed.* (Rush & Shelden, 2020) (approximately $34 on Amazon) and score at least 80% on quiz.
   c. **Putting it into Practice training (No Cost):** A 6-hour training that will build on the skills obtained from the webinars (Sexton, Hansen, Shelden, & Rush, 2016a, b, c) or from reading *The Early Childhood Coaching Handbook, 2nd Ed.* (Rush & Shelden, 2020). This training will provide you the opportunity to practice coaching and receive valuable feedback. The training will also explore and discuss natural learning environment practices. This training will be offered at least quarterly in various locations throughout the state.

**OPTIONAL FOR PROVIDERS**

2. **Proficiency Tools**
   d. **Coaching Logs:** The Coaching Log is a tool that may be used to analyze a single coaching conversation by a person who is learning the coaching process and someone who has more experience coaching (i.e., a supervisor, mentor, or colleague) (Rush & Shelden, 2011).
   AND/OR
   e. **Self-Assessment/ Observation Tools:** There are multiple tools to select from to complete either Self-Assessment or to use as an Observation Tool by an Approved Observer (see training process).
      i. Coaching Proficiency Checklist
      ii. Routines Based Intervention Action Checklist
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3. **Handouts, Coaching Group Guides, and Video Resources:** This identifies helpful handouts and videos that can be used to familiarize staff with self-assessment/observation tools, along with the practices.
(Rush & Sheldon, 2020)

To complete option 1b on the Coaching Proficiency Checklist (see pages 1 & 2 of this Toolkit), please contact your CDSA Director for access to the Handbook. You may also choose to purchase your own copy, sold for approximately $34 on Amazon.com.

To complete the Quiz, based on the Handbook, you may access the quiz at either the link or QR code below. You must score at least 80% on quiz.

Complete the Handbook Quiz:
https://earlyintervention.az1.qualtrics.com/jfe/form/SV_cvWlrq4Fk3bpRps

![QR Code](image-url)
NC ITP Coaching & NLEP Toolkit Instructions References


North Carolina Infant Toddler Program
Coaching & Natural Learning Environments Practices: CDSA Staff Training Process

Step 1: Initial Coaching Training

Step 2: PiIP Training

Step 3: Assignment to Coaching Group/ AO

Step 4: Complete 6 Coaching Logs or SAT with AO review

Step 5: Observation by AO w/ Observation or SA Tool

Step 6: Quarterly Coaching observation by AO w/ Observation or SA Tool

To maintain proficiency status, complete at least one- quarterly coaching observation with your Approved Observer (AO) or Master Coach. After Step 6, staff should engage in ongoing coaching supports.

Plan a time for your Approved Observer (AO) or Master Coach to observe and assess, using an Observation or Self-Assessment Tool, a coaching conversation you are engaged in with a family.

The Coaching Log is the preferred tool to analyze coaching conversations by a person who is learning the coaching process. Self-Assessment Tools (SAT) are used to self-reflect on individual practices. Staff will be eligible to pursue Master Coach or become an Approved Observer (AO) once Coaching and NLEP proficiency requirements have been met.

Coaching groups are often led by Approved Observers (AO’s) or Master Coaches of the local CDSA. These coaching groups allow for participants to engage in activities to promote coaching & NLEP skill building, practice coaching skills and build their capacity. Contact your CDSA Director for additional information.

A 6-hour interactive training that will provide the opportunity to practice coaching and receive valuable feedback. The training will also explore and discuss natural learning environment practices.

Complete all 3 FIPP webinars with at least 80% proficiency OR Read the Early Childhood Coaching Handbook, 2nd Ed. and score at least 80% on quiz. (pages 1-2).

- When at least six logs are completed over six months staff will be eligible to pursue Master Coach Training.
- After one year, engage in ongoing coaching supports (see attached definition).
CDSA Staff

If completing the webinars, please submit the certificates of completion. If reading the handbook, please submit the completed quiz, found here: https://beearly.nc.gov/index.php/providers/training.

Putting it into Practice Training
- All staff will take the basic 6-hour *Putting It into Practice* training. EISCs will also attend Resource Based Coaching Training.

Need Extra Support Beyond the Established Training Process?
- Contact AO to schedule coaching observations
- Meet one-on-one with an AO
- Observations of your coaching by AO with Proficiency tool and meet for feedback sessions

Ongoing Coach Supports

After the first year of proficiency, CDSAs and their Local Implementation Teams (LITs) will set guidelines for annual observation/self-assessment. If at any time there are questions about overall quality of interactions, a staff member’s supervisor and AO should work together with CDSA staff member to devise an individual plan.

Materials contained in the North Carolina Infant-Toddler Program Coaching/NLEP Toolkit Handouts, Coaching Group Guides, and Video Resources list should be used with coaching groups.

SAT = Self-Assessment Tool
AO = Approved Observer, please see attached definition

To qualify as an Approved Observer, you must be one of the following:
1. A Fidelity Coach
2. A Master Coach
3. A CDSA staff member or NCITP contracted provider who has completed:
   - Six logs or other self-assessment tools, and
   - At least one observation by an approved observer, and
   - Approval by CDSA Director or Designee

To maintain AO status, you must participate in ongoing meetings with peers, training to assure inter-rater reliability for proficiency tool, at least annual observation by peer AO utilizing proficiency tool with a staff member, and two to four self-assessment reviews per year.
North Carolina Infant Toddler Program
Coaching & Natural Learning Environments Practices: Community Provider Training Process

- **Step 1:** Initial Coaching Training
  - Required
  - PiiP Training
  - Complete all 3 FIPP webinars with at least 80% proficiency OR Read the Early Childhood Coaching Handbook, 2nd Ed. and score at least 80% on quiz. (pages 1-2).

- **Step 2:** Assignment to Coaching Group/AO
  - Required
  - A 6-hour interactive training that will provide the opportunity to practice coaching and receive valuable feedback. The training will also explore and discuss natural learning environment practices.

- **Step 3:** Observation by AO w/ Observation or SA Tool
  - Required
  - Plan a time for your Approved Observer (AO) or Master Coach to observe and assess, using an Observation or Self-Assessment Tool, a coaching conversation you are engaged in with a family.

- **Step 4:** Complete 6 Coaching Logs or SAT with AO review
  - Recommended
  - Coaching groups are often led by Approved Observers (AO’s) or Master Coaches of the local CDSA. These coaching groups allow for participants to engage in activities to promote coaching & NLEP skill building, practice coaching skills and build their capacity. Contact your CDSA Director for additional information.

- **Step 5:** Observation by AO w/ Observation or SA Tool
  - Recommended
  - To maintain proficiency status, complete at least one quarterly coaching observation with your Approved Observer (AO) or Master Coach. After Step 6, staff should engage in ongoing coaching supports.

- **Step 6:** Quarterly Coaching observation by AO w/Observation or SA Tool
  - Required
  - When at least six logs are completed over six months staff will be eligible to pursue Master Coach Training.
  - After one year, engage in ongoing coaching supports (see attached definition).
  - Staff will be eligible to pursue Master Coach or become an Approved Observer (AO) once Coaching and NLEP proficiency requirements have been met.
Community Providers

Steps in **RED** are required of all individuals who are providing direct services to children enrolled in the NCITP. *If completing the webinars, please submit the certificates of completion. If reading the handbook, please submit the completed quiz (found here: [https://beearly.nc.gov/index.php/providers/training](https://beearly.nc.gov/index.php/providers/training)) and let the CDSA know if ITF Certification credit is being requested.*

**Need Extra Support Beyond the Established Training Process?**
- Contact AO to schedule coaching observations w/AO or other staff
- Meet one-on-one with an AO
- Observations of your coaching by AO with proficiency tool and meet for feedback sessions

**Ongoing Coach Supports**

After the first year of proficiency, CDSAs and their Local Implementation Teams (LITs) will set guidelines for annual observation/ self-assessment. If at any time there are questions about overall quality of interactions, the AO/Supervisor will work together with the direct service provider to devise an individual plan.

Materials contained in the North Carolina Infant-Toddler Program Coaching/NLEP Toolkit Handouts, Coaching Group Guides, and Video Resources list should be used with coaching groups.

**SAT = Self-Assessment Tool**

**AO = Approved Observer, please see attached definition**

To qualify as an **Approved Observer**, you must be one of the following:

1. A Fidelity Coach
2. A Master Coach
3. A CDSA staff member or NCITP contracted provider who has completed:
   - Six logs or other self-assessment tools, and
   - At least one observation by an approved observer, and
   - Approval by CDSA Director or Designee.

To maintain AO status, you must participate in ongoing meetings with peers, training to assure inter-rater reliability for fidelity tool, at least annual observation by peer AO utilizing fidelity tool with a staff member, and two to four self-assessment reviews per year.
Webinar Descriptions

Each module has been approved for **one credit hour toward NC Infant Toddler Family Certification**. To earn credit for completing each module, participants must pass a post-test with a score of **80%** or higher. If you are **unable to pass any posttest with two attempts**, contact your local CDSA Director for further instruction. A certificate of completion is accessible to the participation after successfully completing each module.

*Please contact FIPP technical support for any issues you may have while attempting to complete the FIPP webinars:

Amber Halliburton, Ed.D.
FIPP.CASELMS@dhhs.nc.gov
(828) 430-1197

**Family, Infant and Preschool Program (FIPP) Webinar: Coaching in Early Intervention** (Sexton, Hansen, Shelden, & Rush, 2016a)

You must complete the pre-test before launching this course.

This module is part of a series that has been developed to introduce you to the federal and state regulations that govern early intervention services as well as the evidence-based approach the Early Intervention Program uses to support children and families. In this module, you will examine the characteristics of coaching in natural learning environments. You will learn how to support understanding and use of a coaching interaction style.

**Family, Infant and Preschool Program (FIPP) Webinar: Natural Learning Environment Practices** (Sexton, Hansen, Shelden, & Rush, 2016b)

This course will examine the characteristics of providing early intervention in natural learning environments. The information and practitioners featured in this module also use a coaching interaction style. Natural learning environment practices along with a coaching interaction style provide the most effective early intervention experience to families. Throughout this module, you will explore ways to support the use of natural learning environment practices.

**Family, Infant and Preschool Program (FIPP) Webinar: Family Centered Practices** (Sexton, Hansen, Shelden, & Rush, 2016c)

In this module, you will examine the characteristics of family-centered help giving practices. Throughout this module, you will investigate ways to support team understanding and use of family-centered practices.
Coaching Proficiency Checklist

Provider’s Name: ______________________  Observer’s Name: ______________________  Date: ______________________

*All the steps can occur multiple times during the session and do not need to occur in the same order.*

### I. Joint Planning

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<tr>
<td>1. Did the provider ask the parent/caregiver to reflect on what happened related to the joint plan since the last visit (successes/challenges)?</td>
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<td>2. Did the provider confirm the planned activity for the session and proceed with that activity unless parent/caregiver’s priorities changed?</td>
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<td>3. Did the provider communicate respect by listening fully and supporting the family’s priorities/decisions rather than telling them what to do?</td>
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**Comments:**

### II. Observation

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<td>4. Did the provider observe the parent using strategies discussed in previous sessions, before helping the parent/caregiver generate new strategies or providing feedback?</td>
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<td>5. If needed, did the provider, with the parent/caregiver’s permission, intentionally model a behavior or activity to determine what might work or to help the parent/caregiver see what the provider is talking about?</td>
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III. Action/Practice

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<td>6. Did the provider use an agreed upon activity that is part of the family/caregiver’s daily routines?</td>
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<td>7. Did the provider support the parent/caregiver in practicing, refining, and analyzing new or existing skills that occur during/between sessions?</td>
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<td>8. Did the provider ask probing questions to examine the parent/caregiver’s knowledge and abilities?</td>
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<td>9. Did the provider use toys and materials found in the home or community setting (with the exception of assistive technology)?</td>
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<td>10. Did the provider promote multiple opportunities for the parent/caregiver to practice strategies?</td>
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<td>11. Did the provider explore multiple activities (in addition to playtime on the floor) to engage the child and family?</td>
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<td>12. Did the provider help the parent/caregiver identify other routines/settings in which strategies could be practiced?</td>
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Comments:

Which strategies did the provider use? (Mark all that apply)

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<tr>
<th>Modeling</th>
<th>Explanation or “talking through”</th>
<th>Other</th>
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<th>1: Needs support</th>
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<th>1</th>
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<th>N/A</th>
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<tr>
<td>If the provider used intentional modeling, did he/she use all the steps for intentional modeling:</td>
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<td>13. After receiving parent permission to model, explained what would be modeled and why.</td>
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<td>14. Gave the parent/caregiver a job to do (watch for something specific, collect data, write down questions).</td>
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<td>15. Modeled the strategy/technique.</td>
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<td>16. Helped the parent/caregiver reflect on what worked, did not work, and how it matched what they might do.</td>
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<td>17. Invited the parent/caregiver to try the strategy/technique.</td>
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<td>18. Helped the parent/caregiver reflect on how it worked for them.</td>
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<td>19. Developed a plan with parent/caregiver on how to use the strategy/technique on own and explored times during the day that would work.</td>
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For all strategies:

If the parent/caregiver seemed reluctant to practice the strategy in front of the provider, did the provider:

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<th>0: Not observed</th>
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<th>2: Yes</th>
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<td>20. Offer encouragement?</td>
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<td>21. Offer alternative ways to practice the suggestion and still receive feedback (e.g., videotape or practice at the next visit)?</td>
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Comments:
### IV. Feedback

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<tr>
<td>22</td>
<td>Did the provider give a variety of feedback that affirmed the family’s strengths and capacity to support their child’s learning and development?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Did the provider interact with the parent/caregiver in a nonjudgmental and constructive manner during the visit?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>If needed, did the provider share or prompt access to new information and resources discussed in today’s visit?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comments:

### V. Reflection

<table>
<thead>
<tr>
<th>Score</th>
<th>Description</th>
<th>0</th>
<th>1</th>
<th>2</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>25</td>
<td>Did the provider use a variety of open-ended questions with the parent/caregiver to encourage reflection on the strategy(s) discussed today?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>26</td>
<td>Did the provider check with family on how confident/comfortable they felt in implementing the strategy(s)?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comments:

### VI. Joint Planning

<table>
<thead>
<tr>
<th>Score</th>
<th>Description</th>
<th>0</th>
<th>1</th>
<th>2</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>27</td>
<td>Did the provider develop a plan with the parent/caregiver on what would happen until the next session, based on actions/ ideas discussed?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>28</td>
<td>Did the provider engage the parent/caregiver in planning the routine/activity setting to be addressed at the next session?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comments:

Retrieved and Adapted from: [http://admin.abcsignup.com/files/%7B07D0901F-86B6-4CD0-B7A2-908BF5F49EB0%7D_S9/Final_Coaching_Fidelity_Tool.pdf](http://admin.abcsignup.com/files/%7B07D0901F-86B6-4CD0-B7A2-908BF5F49EB0%7D_S9/Final_Coaching_Fidelity_Tool.pdf)
## EISC Self-Reflection Tool

**Person Completing the Checklist:** ___________________________  **Family Initials:** ___________  **Service Setting:** ___________________________  **Date:** ___________

<table>
<thead>
<tr>
<th>SETTING THE STAGE FOR EARLY INTERVENTION:</th>
<th>YES</th>
<th>NO</th>
<th>Self-Reflection Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Gathers updates on child and family; listens and encourages caregiver feedback, reflection, and intervention</td>
<td>✓</td>
<td></td>
<td>Reviewed the family’s priorities for early intervention and follows up on referrals?</td>
</tr>
<tr>
<td>• Shares information related to development and family interests—connects learning targets to functional outcomes and IFSP priorities to increase caregiver knowledge and resources.</td>
<td>✓</td>
<td></td>
<td>Gathered updates on outside services (e.g., doctor’s appointments, private therapy, etc.)?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>JOINT PLANNING:</th>
<th>YES</th>
<th>NO</th>
<th>Self-Reflection Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Review previous plan.</td>
<td>✓</td>
<td></td>
<td>Referenced joint plan from last session and used to check in/begin?</td>
</tr>
<tr>
<td>• Plan for what you will do at the next visit.</td>
<td>✓</td>
<td></td>
<td>Asked caregiver about new concerns or questions related to services, resources, or family needs?</td>
</tr>
<tr>
<td>• Agreement by the coach and caregiver on the actions they will take or the opportunities to practice between coaching visits.</td>
<td>✓</td>
<td></td>
<td>Made a between-visits joint plan with parent?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OBSERVATION AND OPPORTUNITIES TO SUPPORT EARLY INTERVENTION PRACTICES:</th>
<th>YES</th>
<th>NO</th>
<th>Self-Reflection Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Observes caregiver child interaction in routines – provides feedback and builds on the caregiver strengths and the child’s development and learning related to EI.</td>
<td>✓</td>
<td></td>
<td>Asks the caregiver how the provider supports his/her learning, listens to responses, and encourages reflection and problem solving?</td>
</tr>
<tr>
<td>• Asks the caregiver to describe how early intervention services are supporting their child’s participation in family routines and activities and supports EI plan.</td>
<td>✓</td>
<td></td>
<td>Assisted the family with identifying informal supports?</td>
</tr>
<tr>
<td></td>
<td>✓</td>
<td></td>
<td>Assisted the family with identifying formal supports?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PROBLEM SOLVING, REFLECTION, AND PLANNING:</th>
<th>YES</th>
<th>NO</th>
<th>Self-Reflection Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Follows up on family concerns by engaging in problem-solving discussions to build caregiver capacity and encourage decision-making.</td>
<td>✓</td>
<td></td>
<td>Problem solves with the caregiver about appropriate intervention strategies to embed – coaches the caregiver on evidence-based interventions for identified targets and routines?</td>
</tr>
<tr>
<td>• Offers the caregiver a chance to ask questions about early intervention services, funding for services, and their rights. Helps families understand EI funding, the role of Medicaid, private insurance, and any costs to the family.</td>
<td>✓</td>
<td></td>
<td>Plan and coordinate assessments, IFSP reviews, referrals, and transition meetings as needed?</td>
</tr>
<tr>
<td>• Asks the caregiver what they are learning to do with their child, listens to response and encourages reflection and problem solving to build capacity.</td>
<td>✓</td>
<td></td>
<td>Support communication among team members?</td>
</tr>
<tr>
<td></td>
<td>✓</td>
<td></td>
<td>Did the parent learn new strategies or gain confidence in accessing resources and/or supporting their child in everyday routines?</td>
</tr>
</tbody>
</table>

Adapted from: Virginia Early Intervention Program
## Routines-Based Intervention Checklist

<table>
<thead>
<tr>
<th>Person Completing the Checklist:</th>
<th>Provider:</th>
<th>Service Setting:</th>
<th>Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### JOINT PLAN:
Review previous agreement by the provider and caregiver on the actions taken or the opportunities used to practice between visits along with planning the activity setting for today’s visit.

- [ ] Reviewed joint plan from last session and used to check in/begin?
- [ ] Confirmed the planned activity for the session and proceeded with that activity unless parent/caregiver’s priorities changed?

### OBSERVATION:
Examination of another person’s actions or practices to be used to develop skills, strategies, or ideas.

- [ ] Observed the caregiver using strategies discussed at previous session?
- [ ] If needed, and with permission, intentionally modeled a behavior or activity for caregiver?

### ACTION/PRACTICE:
Spontaneous or planned events that occur within the context of a real-life situation that provide caregiver with opportunities to practice, refine, or analyze new or existing skills.

- [ ] Helped the caregiver practice, refine, and analyze new or existing skills that occur during and between sessions.
- [ ] Used toys and materials in the caregiver home or community setting (except for assistive technology).
- [ ] Promoted multiple opportunities for the caregiver to practice strategies.

### REFLECTION:
Analysis of existing strategies to determine how the strategies are consistent with evidence-based practices and how they may need to be implemented without change or modified to obtain the intended outcome(s).

- [ ] Used open-ended questions to help the caregiver reflect on past and/or new strategies?
- [ ] Asked caregiver what differences they noted (previous practice vs. current practice)?
- [ ] Asked caregiver how they felt implementing the strategy?

### FEEDBACK:
Information provided by the provider that is based on direct observations of the caregiver, actions reported by the caregiver, or information shared by the caregiver and that is designed to expand the caregiver’s current level of understanding about a specific evidence-based practice or to affirm the caregiver’s thoughts or actions related to intended outcomes.

- [ ] Verbally coached the caregiver while practicing, by providing informative feedback?
- [ ] Provided feedback that affirms the family’s strengths and capacity to support their child’s learning and development?

### JOINT PLAN:
Agreement by the provider and caregiver on the actions they will take or the opportunities to practice between visits along with planning the activity setting for next visit.

- [ ] Made a plan for caregiver using strategies between visits?
- [ ] Made a plan for activity setting for next visit?
Handouts, Coaching Group Guides, and Video Resources

- Agreed upon Mission and Key Principles for EI Services in Natural Learning Environments: [https://ectacenter.org/~pdfs/topics/families/Finalmissionandprinciples3_11_08.pdf](https://ectacenter.org/~pdfs/topics/families/Finalmissionandprinciples3_11_08.pdf)

- Seven Key Principles—Looks Like/Doesn’t Look Like: [https://ectacenter.org/~pdfs/topics/families/Principles_LooksLike_DoesntLookLike3_11_08.pdf](https://ectacenter.org/~pdfs/topics/families/Principles_LooksLike_DoesntLookLike3_11_08.pdf)

- FIPP Resources:

  The Fidelity in Practice—Early Intervention (FIP-EI) is a set of practice checklists along with guidance for determining the presence or absence of the practice indicators on each checklist. The FIP-EI includes practice indicators of key characteristics of multiple evidence-based practices including: (a) Coaching Practices, (b) Natural Learning Environment Practices, and (c) Family-Centered Practices. Each checklist includes 5-10 individual indicators that describe key aspects of each evidence-based practice area. This course consists of 12 asynchronous sessions that provide an overview of the tool and 10 practice opportunities to use the FIP-EI to evaluate a video observation of an early intervention visit. This course is intended for supervisors, team leaders, and technical assistance consultants. Certification in the FIP-EI qualifies the holder to use the FIP-EI to support the ongoing professional development of other early intervention practitioners. This course can be accessed at [https://fippcase.learnpointlms.com/](https://fippcase.learnpointlms.com/).

- Head Start/ Early Head Start Coaching Corner series:
  - Early Childhood Learning and Knowledge Center (ECLKL) [https://eclkc.ohs.acf.hhs.gov/professional-development/article/coaching-corner-series](https://eclkc.ohs.acf.hhs.gov/professional-development/article/coaching-corner-series)

- VA EI Professional Development Center:
Hartford Foundation Videos:
Foundations of Coaching in Early Childhood: Partnering with Parents and Professionals

Florida State University- Family Guided Routines Based Intervention Videos:
http://fgrbi.fsu.edu/video.html
FSU & KU FACETS- 10 Step Program to Decrease Toy Bag Dependence
http://www2.ku.edu/~facets/pdf/10stepprogram.pdf

EI Excellence Videos:
http://www.eiexcellence.org/resources/video-library/

EI Excellence Discipline-Specific Resources:

**Speech-Language Pathology:**
- From Couching to Coaching -- The ASHA Leader
- Providing Early Intervention Services in Natural Environments -- The ASHA Leader
- Roles and Responsibilities of Speech-Language Pathologist in Early Intervention: Position Statement American Speech-Language-Hearing Association (ASHA)
- Roles and Responsibilities of Speech-Language Pathologist in Early Intervention: Guidelines American Speech-Language-Hearing Association (ASHA)

**Occupational Therapy:**
- Coaching Model in Early Intervention: An Introduction American Occupational Therapy Association (AOTA)
- Key Principles in Early Intervention Practices in Natural Environments: A Crosswalk with Occupational Therapy Literature
- Supporting Children to Participate Successfully in Everyday Life by Using Sensory Processing Knowledge Winnie Dunn, PhD, OTR, FAOTA

**Physical Therapy:**
- Early Intervention Physical Therapy: IDEA Part C American Physical Therapy Association (APTA)
- Team-based Service Delivery Approaches in Pediatric Practice American Physical Therapy Association (APTA)
- Natural Environments in Early Intervention Services American Physical Therapy Association (APTA)