

Checklists for Implementing a Primary-Coach Approach to Teaming

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Team or Practitioner Name _____ **Date** _____

Checklist Descriptions

These checklists include practice indicators of the key characteristics of a primary-coach approach to teaming in early childhood intervention. A primary-coach approach to teaming is the use of a multidisciplinary team where one member is selected as the primary coach, receives coaching from other team members, and uses coaching with parents and other primary care providers to support and strengthen parenting competent and confidence in promoting child learning and development and obtaining desired supports and resources.

The four checklists describe different areas of primary-coach teaming practices: (a) preparing for a team-based approach, (b) using a primary coach, (c) coordinating joint visits, and (d) conducting team meetings. Each section contains indicators of a specific area of primary-coach approach to teaming practices. For each indicator, determine whether or not the program is adhering to the aspect of the practice described. Space is also available for notes or examples of adherence.

Use of the Checklists

The four checklists include 30 indicators that are the foundation for implementing a primary-coach approach to teaming. The checklists can be used for a number of different purposes:

- They can be used to help a program learn and master the key characteristics of evidence-based teaming practices in early childhood intervention.
- Team leadership and supervisors can use the checklists as observational tools for determining the extent to which the program implements a primary-coach approach to teaming. They can be used to provide feedback and guidance about which practices are consistent or inconsistent with the practice indicators, and what the team members can do to improve their practices. The team leadership and/or supervisor can use the Program Planning section with the team to develop plans for changing practices to better mirror the practice indicators.
- A practitioner can use the checklists to conduct a self-assessment to examine his/her use of primary-coach approach to teaming practices. A self-assessment could be accomplished by the practitioner reflecting on his/her practices as a team member, and determining whether the practices are consistent or inconsistent with each practice indicator.
- The Program Planning section can be used to develop plans for changing practices and identifying the supports needed to make practices consistent with the practice indicators. They can be used for program evaluation purposes by monitoring consistency in the use of the practices and improvements over time.

Preparing for a Team-Based Approach	Are practices characterized by the following?	Yes	No	Examples/Notes
	Program leadership determines the number and specific location of families served by the local program.	Y	N	
	Program leadership determines the fewest number of teams necessary to cover the program area based on the premise that a team of four, full-time practitioners can serve approximately 100-125 families when drive time does not exceed 30-45 minutes for a one-way trip.	Y	N	
	Program leadership identifies the geographic area that each team will cover based on family distribution within a given catchment area, geographic region (i.e., county), zip code, portion of a school district, etc.	Y	N	
	Program leadership ensures that each team minimally consists of an early childhood educator and/or early childhood special educator, occupational therapist, physical therapist, and speech-language pathologist.	Y	N	
	Program leadership ensures that the role of service coordination is fulfilled either by one of the disciplines listed above (i.e., blended model) or by an individual solely responsible for service coordination (i.e., dedicated model).	Y	N	
	Custodial family members are always members of their child's team.	Y	N	
	Program leadership assigns available practitioners to teams beginning with those who are employed or contracted with the program for the greatest amount of time.	Y	N	
	Teams have an identified team leader.	Y	N	
Program leadership assigns each new referral to the team responsible for the geographic area in which the child resides.	Y	N		

Using a Primary Coach	Are practices characterized by the following?	Yes	No	Examples/Notes
	All therapists and educators on the team are available to serve as a primary coach.	Y	N	
	One team member is selected to serve as the primary coach to the family and other care providers.	Y	N	
	The primary coach is selected based on desired outcomes of the family, rapport/relationship between coach and parent or other primary care provider, specialized knowledge, and/or availability of the coach and family.	Y	N	
	The primary coach assigned to a family uses a coaching interaction style to build the capacity of the parents and other care providers to support child learning as well as to identify and obtain needed resources and supports.	Y	N	
	The primary coach receives coaching support from other team members through ongoing formal (planned) and informal interactions.	Y	N	
	The primary coach for a family changes as infrequently as possible (i.e., rarely changes).	Y	N	

Coordinating Joint Visits	Are practices characterized by the following?	Yes	No	Examples/Notes
	Team members support the primary coach through joint visits.	Y	N	
	The primary coach and other team members conduct joint visits at the same place and time.	Y	N	
	The primary coach predetermines with the parents and/or other care providers questions, expected outcomes, and specific actions to be taken during the joint visit.	Y	N	
	The primary coach and other team member define their roles for the joint visit based on questions, expected outcomes, and specific actions to be taken as related to the priorities of the primary coach and parent.	Y	N	
	The primary coach debriefs the joint visit with the parents and/or other care providers to evaluate the usefulness of the joint visit and determine next steps.	Y	N	
	The primary coach and other team member debrief the joint visit to evaluate the usefulness of the joint visit and determine next steps.	Y	N	

Conducting Team Meetings	Are practices characterized by the following?	Yes	No	Examples/Notes
	The team leader ensures that the purpose of the team meeting is to share information among team members as families move through the early intervention process and for primary coaches to receive coaching from their team members.	Y	N	
	All team members attend the weekly team meeting.	Y	N	
	All team members are present for the entire team meeting.	Y	N	
	The primary coach informs the parents of the dates and times of team meetings when their name is on the agenda and invites them to attend if they desire.	Y	N	
	The primary coach invites the parents to send questions or updates to the team meetings via the primary coach and ensures timely feedback.	Y	N	
	The team leader ensures that the team meeting is led by a competent and consistent facilitator. The team meeting facilitator may or may not be someone other than the formal team leader.	Y	N	
	The team meeting facilitator develops a meeting agenda with time limits that has been pre-published.	Y	N	
	The team has clearly defined roles of the facilitator and other meeting participants.	Y	N	
Program leadership compensates team members for team meeting time.	Y	N		

Program Planning

Based on analysis of the primary-coach approach to teaming practice indicators, prepare a plan for making changes and/or ensuring sustainability. Describe the specific action steps that will be taken and identify the particular experiences and opportunities that will be used to make the needed programmatic changes.

Preparing for a Team-Based Approach

Needed change:

Action Steps (i.e., What will be done; by when):

Using a Primary Coach

Needed change:

Action Steps (i.e., What will be done; by when):

Coordinating Joint Visits

Needed change:

Action Steps (i.e., What will be done; by when):

Conducting Team Meetings

Needed change:

Action Steps (i.e., What will be done; by when):