Guidelines for the Role of the Facilitator in the Team Meeting

- Prepublish the agenda.
- Start and stop the meeting on time.
- Ensure that all items on the agenda are addressed.
- Establish and maintain the structure of the meeting.
- Ensure full participation of all participants.
- Control the air time of participants.
- Ensure that people staffing have an action plan and receive what they need.
- Ensure that staffing time is used only for staffing.

The Early Intervention Teaming Handbook: The Primary Service Provider Approach by M'Lisa L. Shelden, PT, Ph.D., and Dathan D. Rush, Ed.D., CCC-SLP

Guidelines for Presenting Information in the Team Meeting

Welcome to the Program

The purpose of welcome to the program is to ensure that all team members have knowledge of new children and families being served by the team. Welcome to the program should take approximately 5 minutes.

- Prior to the meeting, develop a clear understanding of the families' reason(s) for seeking program supports and any information learned about family priorities.
- During the meeting, share
  - Reason for referral
  - Information gathered about child interests, activity settings, and family priorities
  - Steps in the early intervention process that have been completed
  - Supports needed from other team members

Primary Coaching Opportunities

The purpose of primary coaching opportunities is to obtain resources and/or supports (i.e., role assistance) from other team members to ensure that you are effectively addressing the family's priorities. Primary coaching opportunities can last 10–15 minutes.

- Prior to the meeting, identify your need for role assistance from other team members and determine how to present the situation to the rest of the team in a concise manner. The following are questions to consider.
  - What is your question or issue?
  - What type of role assistance are you seeking (e.g., information, resources, strategies, acknowledgment that you are doing the right thing, assistance in thinking through a situation, joint visit from a colleague)?
  - What is your or the parent's current knowledge/actions taken regarding this topic/issue?
  - If child learning, then what are the current interests and activity settings that serve as the context for intervention?
  - What are the current family priorities?
  - What is the minimum amount of information you need to share to ensure team members understand the situation?
- During the meeting, state your need for role assistance in the form of a question or an issue.
- Provide feedback to other team members regarding whether they are giving you the support and assistance you need.
- Restate or clarify your question(s) or issue(s) as needed.
- Ensure that you have a concrete and specific action plan before the facilitator moves to the next item on the agenda.

Quarterly Updates

The purpose of the quarterly updates is to ensure that all children and families are brought to the attention of the full team on at least a quarterly basis. If a family is brought to the team during the primary coaching opportunities section of the agenda, this may also serve as the quarterly update. Quarterly updates should take no longer than 5 minutes.

- Prior to the meeting, review the staffing report from the previous update. Determine what progress has been made or changes in status have occurred.
- During the meeting, share
  - Current focus of the visits regarding child learning, parenting support, and parent support (see Appendix 7G)
  - The current plan for the family
  - Next steps

Guidelines for How to Provide Coaching in the Team Meeting

- Be certain that you clearly understand the presenter's question or issue.
- Seek clarification of the question or issue, if necessary.
- Be certain that you know what the presenter already knows, has done, or is thinking in relation to the issue or question before providing additional information or ideas.
- Be respectful of other team members' lines of questioning. Allow others to finish their questions, comments, or lines of thinking prior to jumping in with another question or before sharing additional information.
- Listen to what the other team members are asking or sharing. If your thoughts, questions, and ideas are addressed, then you do not need to jump into the conversation.
- Only one person should talk at a time.
- Direct your questions or information to the presenter, rather than another team member.
- Stay on topic. The focus should be on the presenter.
- Share the air time with other team members.
- Asking questions means that you are open to varied possibilities as answers. Having a predetermined answer that you are trying to get the presenter to say is coaxing rather than coaching.
- Information should be shared only after the question or issue has been adequately defined and the presenter has been given the opportunity to reflect on his or her actions, intentions, ideas, and possible solutions/actions.
- Avoid giving advice (e.g., statements that include the following words: *should, ought to, need to*).
- Ensure that the presenter is getting the type of role assistance he or she intended.
- Check for the presenter's understanding of any information that is being shared. Listen to the presenter and read his or her body language as feedback regarding whether he or she is receiving the type of role assistance he or she wants/needs.
- Ensure that the presenter has a concrete and specific plan to implement prior to ending the coaching conversation.
- Ensure that the plan includes a mechanism for sharing the outcomes of plan implementation either with the entire team or key individuals during a follow-up meeting/conversation.
- The team meeting facilitator has ultimate control of the meeting. His or her requests to close a conversation should be respected.

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Guidelines for Agenda Building for the Team Meeting

- All primary coaching opportunities, quarterly updates, welcome to the program, transitions, and closures must be posted to the agenda 24 hours prior to the start time of the team meeting. Agendas are located on the shared drive.

- No additional items may be added to the agenda within 24 hours of the staffing meeting unless the situation requires immediate support. If the situation requires immediate support and occurs within 24 hours of the staff meeting, then you may request that the item to be added to the agenda at the beginning of the team meeting.

- Transitions and closures will be posted to the agenda for team members' awareness only and will not be discussed during the meeting unless a team member has a particular question that would involve more team members than the primary service provider.

- Time frames will be assigned to each agenda item by the team meeting facilitator prior to the team meeting.

Team Meeting Agenda

Date: ____________

Team members present: ____

____

____

____

____

____

Primary coaching opportunities

Primary service provider (PSP)	Family	Question/issue

Quarterly updates

PSP	Family

Welcome to the program

Family	PSP

Transitions

Family	PSP

Closures

Family	PSP

Team Meeting Minutes

Date: ____________ Team name: ______________________________

Beginning time: ____________________ Ending time: ____________________

Team members present:

____

____

____

Primary service provider (PSP): ______________________________

Child's name: ______________________________

Beginning time: ____________________ Ending time: ____________________

Summary: ____

____

____

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PSP: ______________________________

Child's name: ______________________________

Beginning time: ____________________ Ending time: ____________________

Summary: ____

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PSP: ______________________________

Child's name: ______________________________

Beginning time: ____________________ Ending time: ____________________

Summary: ____

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Individual Family Staffing Report

Family name: ______________________________ Team meeting date: __________

Child's name: ______________________ Last review in team meeting: ____________

Primary service provider: ____

Secondary service provider(s): ____

Type of staffing (check one)	**Discussion/outcome**
❐ **Welcome to the program** (before the individualized family service plan) Information needed by other team members • Reason for referral • Information gathered about child interests, activity settings, and family priorities • Steps in the early intervention process that have been completed • Supports needed from other team members	**Plan:**
❐ **Primary coaching opportunity** Information needed by other team members • Question/issue you are bringing to the team for support • Your or the parent's current knowledge/actions taken regarding this topic/issue • If child learning, then current interests and activity settings that serve as the context for intervention • Current parent priorities	**Role assistance** 1. Response to the question/issue discussed during team meeting Plan: *And/or* 2. Joint visit with __________ on __________ at __________ Plan for joint visit: • Conversation to occur with parent: • Context for joint visit and why: • Person taking lead in joint visit and why: • When to debrief joint visit:

(continued)

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❒ Quarterly update Information needed by other team members *Child learning* • Child's current interests and activity settings • Ways in which you and parent are promoting child's participation • How your actions and/or interactions relate to the parent priorities *Parenting support (e.g., sleep, behavior, nutrition, toileting)* • Topics, questions, or issues currently being addressed • Ways in which previous supports are being addressed *Parent support (e.g., housing, transportation, employment, medical)* • Topics, questions, or issues currently being addressed • Ways in which previous supports are being addressed • Informal and formal resources to meet identified needs	Plan:
❒ Transition Information needed by other team members • Transition plan	Transition plan:
❒ Closure Information needed by other team members • Reason for closure	Follow-up:

Team members present (signature and discipline):

______________________ ______________________

______________________ ______________________

______________________ ______________________

______________________ ______________________