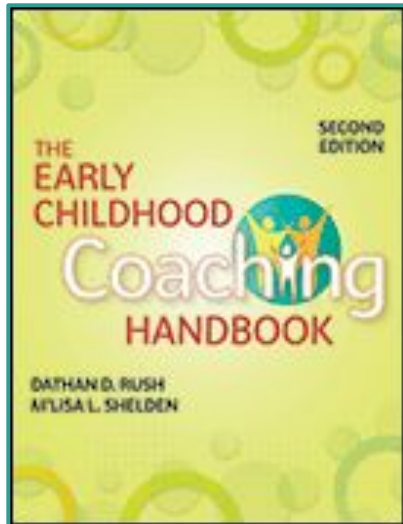
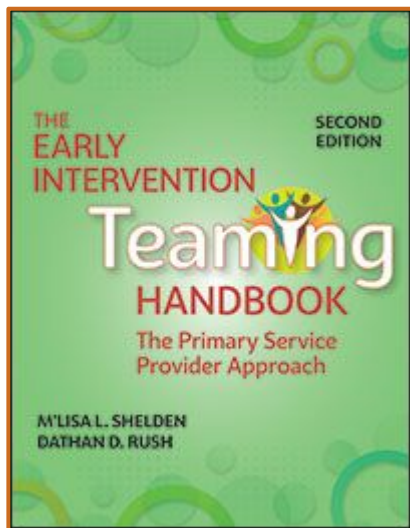




ARIZONA
DEPARTMENT OF
ECONOMIC SECURITY

**Coaching Practices: Joint
Planning**
AzEIP Programmatic Meeting
April 22, 2025



Today's Presentation is based on:

The Early Intervention Teaming
Handbook The Primary Service
Provider Approach, M'Lisa L. Shelden &
Dathan D. Rush

and

The Early Childhood Coaching
Handbook, Dathan D. Rush &
M'Lisa L. Shelden

Arizona Early Intervention Program (AzEIP) Mission Statement

Part C early intervention builds upon and provides supports and resources to assist family members and caregivers to enhance children's learning and development through everyday learning opportunities.

A graphic for the Arizona Early Intervention Program (AzEIP) featuring a smiling baby. The text is overlaid on a green background. The title 'Arizona Early Intervention Program' is at the top. Below it is the heading 'Our Mission' followed by a paragraph describing the program's goal. At the bottom, there is a logo for the Department of Economic Security and the website address.

Arizona Early Intervention Program

Our Mission
Part C early intervention builds upon and provides supports and resources to assist family members and caregivers to enhance children's learning and development through everyday learning opportunities.


DEPARTMENT OF ECONOMIC SECURITY
and Partner for A Stronger Arizona

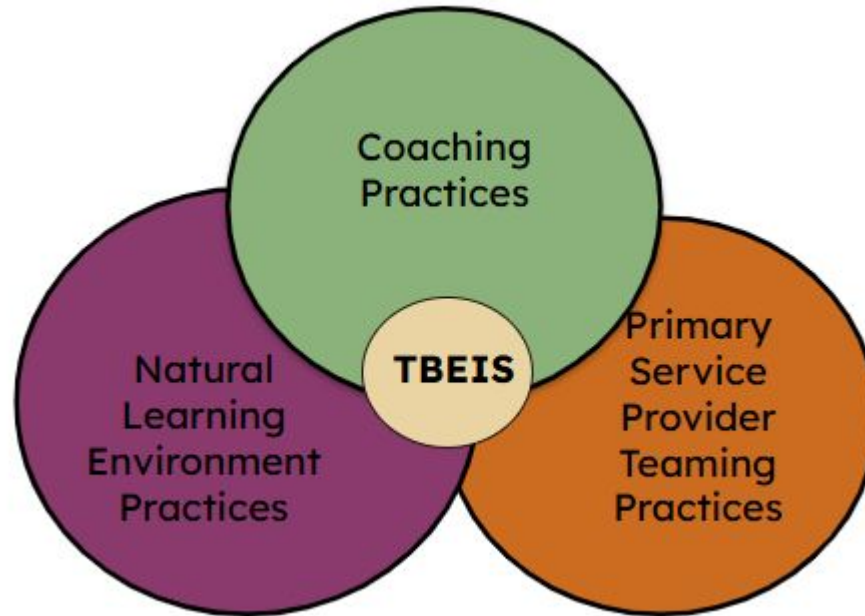
www.azdes.gov/azcip

AzEIP

The 7 Key Principles of Early Intervention

1. Infants and toddlers learn best through everyday experiences and interactions with familiar people in familiar contexts.
2. All families, with the necessary supports and resources, can enhance their children's learning and development.
3. The primary role of a service provider in early intervention is to work with and support family members and caregivers in children's lives.
4. The early intervention process, from initial contacts through transition, must be dynamic and individualized to reflect the child's and family members' preferences, learning styles and cultural beliefs.
5. IFSP outcomes must be functional and based on children's and families' needs and family-identified priorities.
6. The family's priorities, needs and interests are addressed most appropriately by a primary provider who represents and receives team and community support.
7. Interventions with young children and family members must be based on explicit principles, validated practices, best available research, and relevant laws and regulations.

Team Based Early Intervention Components



Definitions

Term	Definition
Coach	The person who uses the coaching characteristics to support the learning and development of another individual. *For this presentation “coach” is referring to the practitioner.
Coachee	The person who receives the support of the coach. *For this presentation, “coachee” is referring to the caregiver.
Core Team	The full team of practitioners, other than the service coordinator, who support the child and family.
Practitioner	Professional, including the service coordinator, who provides Part C early intervention services.
Primary Service Provider Teaming Practices	Every child and family have a full team supporting and available to them, but one person functions as the primary support.

Acronyms and Definitions

Acronym	Term	Definition
PSP	Primary Service Provider	Individual on the team that acts as the primary point of contact and liaison between the family and other team members.
TL	Team Lead	The PSP in Arizona is known as the TL.
SC	Service Coordinator	Practitioner who assists and enables families to access services and assures their rights and procedural safeguards.
TBEIS	Team Based Early Intervention Services	<p>The approach to providing early intervention services in Arizona where services are provided by a transdisciplinary team and:</p> <ul style="list-style-type: none"> • A Team Lead (TL) is selected as the primary support for a family, • The TL receives support from other team members, and • The focus of services is on building parent/caregiver capacity for the child in their natural learning environment.
FAB	Flexible Activity- based Burst of Support	FAB scheduling is flexible, activity based and involves bursts of support. Provides opportunities for practitioners to support caregivers in more meaningful and helpful routines.
FIPP	Family Infant and Preschool Program	The Family, Infant and Preschool Program (FIPP) that serves families of young children with and without disabilities in North Carolina.

1st Component of Coaching



Joint Planning

Observation

Action/Practice

Reflection

Feedback

Explaining Coaching to Families

I'd like to take a few minutes to talk to you about what our visits will look like.

OBSERVATION & REFLECTION:

In order to best support you in your everyday interactions and care for your child, I'll be asking you questions and also observing you doing what you usually do in situations that relate to the priorities you have for your child. I'll ask these questions and make these observations for several reasons.

REFLECTION & FEEDBACK:

First, I want to make sure that I understand what you already tried and explore any ideas you've been thinking about. I'll ask these questions to gain information and also to help you think about what's been working and what hasn't. I expect that you might have lots of questions for me, too. I'll answer your questions openly, and honestly and to the best of my ability.

Explaining Coaching to Families (continued)

FEEDBACK & ACTION/PRACTICE & JOINT PLANNING:

As we share information with one another, sometimes you'll be teaching me things about your child and family, and sometimes I'll be sharing new information and ideas with you. We'll be practicing new ideas together, I'll try things, you'll try things and during each visit, **we'll decide what we will plan together.**

JOINT PLANNING & ACTION/PRACTICE & REFLECTION:

During our planning, we'll decide what we will be responsible for doing between visits. You'll choose what strategies you will practice as part of your daily activities and think about what worked and what you might do differently as a result of your practice. We will also plan activities that need to happen or decide what information we need to gather between visits. Our plan will help us decide when our next visit needs to occur.

My intent is that by interacting with you in this way I can support you in recognizing all of the strategies you are already using and we may come up with new ideas together to support your child as part of your everyday activities.

[Sample Coaching Explanation for Parents](#)

Joint Planning in Practice



https://www.youtube.com/results?search_query=Hartford+Foundation+Coaching

Joint Planning

- The agreement by both the coach and coachee on the actions that one or both will take or the opportunities that the coachee will use to practice between coaching visits and prepare for the next visit.
- Ensures that the coachee actively participates in the use of new knowledge and skills between coaching sessions.

Two Parts of Joint Planning

- **Part 1: Between Visit Plan**
 - What the coachee agrees to do between coaching interactions regarding the use of the information that was discussed or the skills practiced when the coach was present.
- **Part 2: Next Visit Plan**
 - Planning for the next visit - schedule at a time that coincides with the activity that will be the focus of the next interaction.

Opportunities to Use Joint Planning

- At the beginning and the end of each coaching discussion,
- During *all* coaching conversations, and
- May occur as the coach and the coachee shift from one topic to the next during the visit.

Reviewing the Previous Joint Plan

Revisitation of the joint plan should be as specific as possible.

5 types of questions to initiate coaching conversations:

- Generic grand-tour question
- Skill-focused question
- Strategy-focused question
- Strategy-focused question tied to an activity setting
- Activity-focused question

Generic Grand-Tour Question: Benefits/Drawbacks

How is Betsy doing?

How are things going since we last met?



Service Providing Agency Reflections

Benefits:

- They're useful when we're getting to know a family or just met them.
- Family can share what is really pressing on their minds.

Drawbacks:

- They can elicit one word answers.
- We could get more than we need to focus on for that time.

Disadvantages of Generic Grand-Tour Questions

- Response can go anywhere
- Reference to the joint plan is implied
- Not conducive to revisiting the previous Between Visit Plan to determine the level of the coachee's active participation and reflection

Skill-focused Questions: Benefits/Drawbacks

Is Betsy using any new words?
How is Betsy doing with pulling to stand?
How is Betsy holding the spoon now?



Service Providing Agency Reflections

Benefits:

- You get specific information.
- You get a clearer idea of what is going on and get a better idea of parent's perception.

Drawbacks:

- Information is out of context.
- You only get specific information on what you ask about so you may miss out on other information.
- When we don't focus on the activity we may not help the families feel they are able to support instead of the team.

Disadvantages of Skill-focused Questions

- Relate directly to the child's deficits and skills being addressed.
- Place emphasis on isolated skills rather than functional use and context in which it is used.
- Initiate skill based conversations rather than conversations that would promote the child's use of the skill within context of everyday activities through modeling and practice.

Strategy-focused Questions: Benefits/Drawbacks

Our plan was for you to use choices this week, how has this been going?

Tell me how it worked putting his toys up on the couch?



Service Providing Agency Reflections

Benefits:

- Directed to the strategy suggested.
- Reminds parents of specific strategies and sets up for future scaffolding.
- We are building capacity to help families with strategies

Drawbacks:

- Missing the context of the routine.
- They may not feel it's tied to an activity or remember when they should work on it

Disadvantages of Strategy-focused Questions

- Focus is placed on the use of the strategy rather than the child's participation in activities that incorporate that strategy.
- Strategies are often a part of coaching conversations and occur only within the context of functional and meaningful activity settings.

Strategy-focused Questions Tied to an Activity Setting: Benefits/Drawbacks

How have you been doing with giving your child choices for drinks during mealtime?

How has it been going with moving Betsy's toys just out of reach during playtime?



Service Providing Agency Reflections

Benefits:

- It reinforces the joint plan from the previous visit and will help with identifying if changes need to be made.
- Reminder of specific times, breaks it down into achievable micro steps.

Drawbacks:

- It can make a parent feel like they have failed if not done exactly as planned, but it does set up for future planning.

Disadvantage of Strategy-focused Questions Tied to an Activity Setting

- Emphasis is on a particular strategy which could limit the ways in which the coachee responds to the child.

Activity-focused Questions: Benefits/Drawbacks

Tell me about your mealtime routine this week.

Last time I was here, you were going to focus on how you could support Betsy's involvement with your family mealtime. Tell me how that is going.

Service Providing Agency Reflections

Benefits:

- We are focused on the activities so we support building capacity.
- It's an open-ended question that can prompt a thorough reflection.
- It opens up for family to share what they have observed and/or experienced.
- This gives the provider an opportunity to provide thoughtful positive feedback, which can be empowering to the parent/caregiver.

Drawbacks:

- We can end up in a more generic response even though we're focused on the activity.
- It is broad, needs follow up questions/discussion.
- If the parent is having a difficult time with mealtime, for example, it might be hard to talk about.

Advantages of Activity-focused Questions

- Using activity-focused questions is the *recommended method* to use when revisiting the joint plan.
- Activity settings could yield multiple possibilities for skill development and use of any strategies discussed in previous conversations.
- Emphasis is on the child's participation in an activity setting and actions that the child and parent can take to promote learning.
- Allow practitioner to follow up with more specific probes:
 - What did you try that went well?
 - What could you have done differently?
 - What was Betsy learning during mealtime?
 - What did you do that made a difference?

Developing the 2-part Joint Plan

- Between Visit Plan
- Next Visit Plan



Between Visit Plan

The coach begins with a question such as:

- Thinking back on what we talked about and practiced today, what would you like to focus on between now and our next visit?
- What would you like to accomplish between now and the next time we meet?

By the coachee identifying what they would like to focus on, the coach:

- Learns what appeared to be most important, helpful, or of interest to the caregiver.
- Checks for the caregiver's understanding of actions or strategies discussed or practiced during the visit.

Between Visit Plan: Missing Pieces

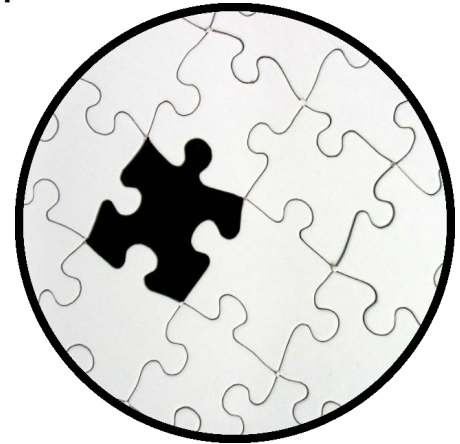
If the coach believes a critical strategy discussed at the visit is missing from the joint plan, the coach may:

- Remind the caregiver of the strategy, and
- Ask if the caregiver would like to include it in the joint plan.

If the caregiver agrees: add to the joint plan.

If the caregiver disagrees, coach may:

- Ask about the decision, and
- Reflect on the response with the caregiver.



Next Visit Plan

- Developed around the activity setting planned for the next visit.
- Coach asks questions such as “What activity setting would you like to focus on during our next visit?” and “When should we meet again so I can join you for that activity?”



Documenting the Joint Plan

Coach:

- Always documents the Joint Plan in the Early Intervention Contact Log (GCI-1094A).
- Discusses with the family if they would like reminders/documentation of the Joint Plan.

Based on their learning style and preferences, caregiver may choose to:

- Receive a copy of the Early Intervention Contact Log (GCI-1094A),
- Write the plan on a calendar,
- Create a to-do list,
- Keep a checklist on the refrigerator, or
- Integrate into everyday activities so nothing more is needed.

Do you know what FAB stands for ?

F*lexible*

A*ctivity-based*

B*ursts of support*

FAB Scheduling

- Supports child learning through the use of real-life routines and activities as contexts for early intervention visits.
- Provides opportunities for practitioners to support caregivers in more meaningful and helpful routines and activities.
- Offers the opportunity to provide higher quality services to caregivers.

Flexible

Providing supports when caregivers need it.

Flexible scheduling means visiting a child and their family or the childcare program during a variety of caregiver-identified routines in which they need the support rather than going on the same day and time every visit.

What Does Flexible Mean to You?

Service Providing Agency Reflections

- Variety of times of day
- Variety of activities
- Based on activity
- Open to seeing the child at different times of day on different days if needed
- Scheduling is not the same day/time each week
- Based on when a specific activity occurs
- Working with / considering / accommodating the family's schedule

Activity-based

Providing supports where caregivers need it.

Activity-based scheduling involves being available for caregivers during the real life activities that provide opportunities for child participation and learning. Rather than taking or creating an activity during the time you regularly schedule your visit, go when the caregiver-identified routine really happens (e.g., mealtime, tooth-brushing, doing laundry).

What Does Activity-based Mean to You?

Service Providing Agency Reflections

- Activities based on the goals
- Activity/routine that needs support as prioritized by the family
- Consider what the family wants to work on
- Example: Feeding issues can be scheduled during meal time
- Something that comes up during the session

Bursts of Support

Providing supports as often as caregivers need it.

Frequency and intensity of intervention visits may change as a family's priorities evolve. Scheduling bursts of support allows for visits to occur at a frequency that matches the caregiver's pace of learning and ensures families receive the support they need.

FAB Scheduling: Frontloading

A scheduling strategy that enables the practitioner and care provider to address pressing needs faster than they otherwise might with a less frequent approach.

A burst of support may be used:

1. At the beginning of intervention with a newly enrolled child/family.
2. Any time during intervention due to changes in family, child, environment or practitioner factors.






What Does Bursts of Support Mean to You?

Service Providing Agency Reflections





- A burst of support may include visits closer together to work on the family's priorities.
- Examples of when bursts can be helpful:
 - After hospitalizations where there may be new regressions or new concerns that have come up.
 - After a trauma or increase in “behaviors”.
 - If families recently had a recommendation for multiple therapies and aren't feeling confident.
- When frontloading a burst of support sometimes the family realizes that it's not a manageable frequency for them and we need to scale back.

FAB Scheduling Tips and Tricks

Try these tips and tricks to overcome the challenges of flexible, activity-based scheduling that accommodate bursts of support when needed.

<i>Challenge</i>	 <i>Try</i>
Going during naturally occurring times of the routine/activity setting	 Planning with the caregiver(s) around multiple activity settings/routines that support their desired priorities. This provides flexible options for scheduling based on your and the family's availability.
Family struggling to keep track of visits	 Problem-solving with the family to figure out what best helps them keep track of appointments (e.g., setting reminders, text from provider).
Reflecting with caregivers during busy routines/activity settings	 Using a variety of coaching strategies: reflection-for-action (before the activity occurs), reflection-on-action (after the activity has occurred), or video reflection with caregivers (recorded prior to visit or during visit).
Balancing family-driven scheduling with work and personal calendar	 Setting boundaries based on your program's guidelines and personal commitments that you have (e.g., block calendar for times you are not available, only offer times that you can do).

FAB Scheduling Tips and Tricks continued

<i>Challenge</i>		Try
Knowing when to use a burst of support		Providing a burst of support when a new or particularly challenging priority arises, multiple caregivers need support, or progress has stalled.
Knowing how to best make a burst fit a family's individual needs		Thinking about the different ways a burst might look: a couple of shorter visits in a week, having one visit in an activity and one focused on resource supports, and having visits with each caregiver you are supporting.
Knowing when to end a burst of support		Discussing with the family their confidence and need for on-going support based on progress made on IFSP outcomes.



Visits that occur during the routine the family wants help with are efficient, reduce missed visits, and increase caregiver buy-in and participation.

TBEIS Fidelity

A practitioner's faithfulness to implementing team-based early intervention practices (coaching, natural learning environment, and primary service provider approach) as planned and intended.

Fidelity Checklist

Joint Planning Fidelity			
1: Starting Point	The Team Lead facilitates the conversation with the family about what the family and/or caregiver tried or accomplished since the previous visit.		
3: Progressing	The Team Lead facilitates the conversation with the family about what the family and/or caregiver tried or accomplished since the previous visit.	The Team Lead facilitates a review of the previous joint plan of action and what the family and/or caregiver has tried or accomplished since the last visit.	
5: Innovating	The Team Lead facilitates the conversation with the family about what the family and/or caregiver tried or accomplished since the previous visit.	The Team Lead facilitates a review of the previous joint plan of action and what the family and/or caregiver has tried or accomplished since the last visit.	The Team Lead ends the visit with: (1) a joint plan that includes who is going to do what by when, determines if a joint visit is needed, and specifies what the family and/or caregiver will try to accomplish; and (2) a joint plan for the next visit.

Resources

- The Early Intervention Teaming Handbook The Primary Service Provider Approach by M’Lisa Shelden & Dathan D. Rush
- The Early Childhood Coaching Handbook by Dathan D. Rush & M’Lisa Shelden
- The Early Intervention Workbook Essential Practices for Quality Services by Lynda Cook Pletcher and Naomi O Younggren
- Family Centered EI: Supporting Infants and Toddlers in Natural Environments by Sharon A. Raver-Lampman and Dana Childress
- Pause and Reflect: Your Guide to a Deeper Understanding of Early Intervention Practice by Dana Childress
- Routines-Based Early Intervention Supporting Young Children and Their Families by R.A. McWilliam

Resources (continued)

FIPP resources:

- To The Point - FIPP
- FIPP FAB Scheduling (2022)
- FIPP FAB Scheduling (2024)
- FIPP FAB Scheduling Tips and Tricks
- Ensure Provider Fidelity to Coaching Practices
- Roadmap for Reflection: Interest-Based Child Learning in Natural Settings Using a Coaching Interaction Style

Video clips:

- Foundations of Coaching in Early Childhood: Joint Planning (Chapter 2)
- Coaching 101 Getting Down to the Basics About Coaching Early Care Providers

Thank You for Participating

Arizona Early Intervention Program Quality Improvement Team

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