

Service Coordination Strategies

Coaching is “an adult learning strategy in which the coach promotes the learner’s (coachee’s) ability to reflect on his or her actions as a means to determine the effectiveness of an action or practice and develop a plan for refinement and use of the action in immediate and future situations.” (Rush & Shelden, 2011, p. 8)

The table below includes the various aspects of a family’s journey through early intervention and strategies service coordinators may consider as they plan “with” the family, rather than “for” the family.

Activity	Planning “with” the Family	
	Ask	Discuss
Referral	<p><i>During referral...</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> What questions/concerns do you have (if any)? <input type="checkbox"/> Were you aware of the referral? (If referral was made by someone else) <input type="checkbox"/> What local organizations or agencies are your family involved with? <input type="checkbox"/> Are there any community resources that you wish to connect with? <input type="checkbox"/> What medical providers do you visit with your child? 	<ul style="list-style-type: none"> <input type="checkbox"/> The family's concerns: Determine what questions do they have or what issues they face. <input type="checkbox"/> The family's supports: Community resources, organizations or agencies involved in the lives of the child and family, including those they may be want as supports. Determine who will make the connection, if needed. <input type="checkbox"/> The child's medical providers: Determine if there is anyone else they would like to notify about the referral.

Activity	Planning “with” the Family	
	Ask	Discuss
Intake	<p><i>When planning all evaluations, assessments and IFSP activities...</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> When would you like to have this happen? <input type="checkbox"/> Who would you like to be included? <input type="checkbox"/> Where is the best place for this to occur? <input type="checkbox"/> How can I best support you during the meeting? <input type="checkbox"/> Do you have any questions or concerns? 	<ul style="list-style-type: none"> <input type="checkbox"/> The family's preferred date, time and location for this visit. Provide and discuss options and choices. <input type="checkbox"/> The family's allies: Anyone else they would like to include in this meeting. <input type="checkbox"/> The family's comfort level: Invite them to tell their story, check for understanding, and ask follow-up questions about their priorities, concerns and routines during the visit. <input type="checkbox"/> Next steps: Summarize what will happen and discuss ways they can share responsibilities throughout the process.
Evaluation/ Assessment	<p><i>Prior to the evaluations and assessments...</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> Do you have any questions about your role during the evaluation and assessment? <input type="checkbox"/> What providers would you prefer to work with for the evaluation and assessment? <input type="checkbox"/> Do you have any questions or concerns about the evaluators or the process? 	<ul style="list-style-type: none"> <input type="checkbox"/> What to expect: Explain the process and procedures involved and invite questions from them throughout the process. <input type="checkbox"/> Selecting providers: With the family, determine who the providers will be based on knowledge, skills and family preferences. <input type="checkbox"/> Who is on the team: Give the family the names, roles and contact information of the evaluators. If possible, share bios or descriptions of who they are and what their expertise. This allows families to review and ask questions prior to the evaluation.

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	Ask	Discuss
Eligibility	<p><i>When informing them of eligibility...</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> Do you have any questions about how eligibility was determined? <p><i>If the child is eligible for services...</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> Would you like to proceed with the IFSP meeting? <input type="checkbox"/> Who would you like to notify about eligibility? (e.g. physician, referral source, childcare provider, family members, etc.) <p><i>If evaluation/assessment and IFSP meeting are set for the same day...</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> Would you like to proceed with the IFSP development today? <input type="checkbox"/> Do you need to take a break or reschedule? <ul style="list-style-type: none"> ○ If necessary, work with the team member to schedule an alternate time to develop the IFSP. ○ Document this decision as it may impact 45 day timeline. 	<p><i>If the child is eligible for services...</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> Recognition: Provide space and support for processing the information shared and any feelings or emotions that may have arisen as a result of eligibility determination. <input type="checkbox"/> Notifications: Empower the family to participate in the notification of eligibility to the people in their lives. <input type="checkbox"/> IFSP Development: Discussing whether or not the family would like to proceed with IFSP development. <input type="checkbox"/> IFSP meeting: Check in to see what is best for when, where and who attends. If the meeting is the same day as evaluation/assessment, discuss whether or not the family wants to continue at that day and time or if they need to reschedule. <p><i>If the child is ineligible for services...</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> Ask if they have any additional questions <input type="checkbox"/> Explore potential resources outside of early intervention with the family before the record is closed.

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IFSP Development	<p><i>When planning the meeting...</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> When would you like to have this happen? <input type="checkbox"/> Who would you like to be included? <input type="checkbox"/> What additional information do you want to include on the agenda?* <input type="checkbox"/> Do you have any questions about the agenda?* <p><i>During the meeting...</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> What has changed since intake and evaluations? <input type="checkbox"/> What concerns do you still have? <input type="checkbox"/> What are your current priorities? <input type="checkbox"/> What questions do you have so far? <input type="checkbox"/> How do the outcomes align to your priorities? <input type="checkbox"/> Does this outcome work within your routines? <p>*You may want to ask these questions twice! First when you share the agenda and again on the day before the meeting.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Logistics: Invite the family to participate in the decision making process for how/when this meeting takes place and who will participate in the meeting. <input type="checkbox"/> Agenda: Prior to the meeting, share the agenda and ask them to think about their contributions they plan to make, any questions and any additions to the agenda. <ul style="list-style-type: none"> o Call the family the day before the meeting and ask them if they have any new concerns, questions or agenda items. <input type="checkbox"/> The family's importance: Ask them to lead the discussion or use some questions from the left column to engage them in the discussion. <input type="checkbox"/> IFSP outcomes: Encourage participation in joint IFSP outcome development. Ask them to help make linkages to their priorities/routines. <input type="checkbox"/> Existing resources/supports: Review these as the service plan is developed and ask family to consider times of day that they need additional support from EI and non-EI services.

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IFSP Implementation	<p><i>When discussing IFSP implementation...</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> Are there any service providers you prefer to use for achieving these outcomes? <input type="checkbox"/> Do you have any financial concerns about implementing services? <input type="checkbox"/> Will you be using insurance for services? <input type="checkbox"/> (If private insurance is used) Would you like to use an in-network provider who is able to continue with you after exiting EI? 	<ul style="list-style-type: none"> <input type="checkbox"/> Ongoing service providers: (if different from evaluation/assessment team): Include the family in the identification of providers with the knowledge and skills needed to address outcomes, as well as their availability to meet the family within their routines and scheduling preferences. <input type="checkbox"/> Finances: If applicable, ask family for necessary insurance and financial information to implement services. <ul style="list-style-type: none"> <input type="checkbox"/> Private insurance: Partner with family if they would like to find an in-network provider, who may be able to continue on with the family after they exit early intervention.
Monthly Contacts	<p><i>When reaching out to the family each month...</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> How are services going? <input type="checkbox"/> What is working well? <input type="checkbox"/> What could be working better? <input type="checkbox"/> What, if any, concerns do you have? 	<ul style="list-style-type: none"> <input type="checkbox"/> Outcomes: Review outcomes. Ask for their input on progress and how services are going. <input type="checkbox"/> Next Steps: Determine together who will follow up on any next steps (such as phone calls, discussions with providers or the medical home, meetings to be scheduled, etc.)

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IFSP Reviews	<p><i>When planning the meeting...</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> What time and place work best? <input type="checkbox"/> Who would you like to include? <input type="checkbox"/> What additional information do you want to include on the agenda?* <input type="checkbox"/> Do you have any questions about the agenda?* <p><i>During the meeting...</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> What are your thoughts on the outcomes? <input type="checkbox"/> What progress has been made? <input type="checkbox"/> What concerns do you still have? <input type="checkbox"/> Have your priorities changed? <input type="checkbox"/> What questions do you have so far? <input type="checkbox"/> Who can help with our next steps? <input type="checkbox"/> Are there new resources or additional supports needed? <ul style="list-style-type: none"> ○ Will the family contact community resources/supports discussed? <input type="checkbox"/> Will the family share updates/progress with physician, childcare providers or anyone else? 	<ul style="list-style-type: none"> <input type="checkbox"/> Meeting Planning: Schedule a date, time and place that works best for the family. Be sure to include any guests they want to attend. <ul style="list-style-type: none"> ○ Consider inviting the school district if the child is 30 months or older to combine with a transition planning conference. <input type="checkbox"/> The family's involvement: Ask family to review outcomes and invite family to share an update as to the progress they feel has been made. <input type="checkbox"/> Progress reports: Let the family know that the providers will have progress reports prepared (if used in the program) and see if they would like to prepare their own progress report. <input type="checkbox"/> Agenda: Share agenda with family ahead of time and discuss places where they can take the lead. <input type="checkbox"/> Next Steps: Determine together who will follow up on any new tasks/activities that have been discussed.

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Transition	<p><i>Before the transition planning conference...</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> What are your hopes and dreams for your child after leaving EI? <input type="checkbox"/> What concerns do you have for your child related to this change in services? <input type="checkbox"/> What outcomes would you like to achieve? <input type="checkbox"/> Do you have any questions about your child entering Part B services? <input type="checkbox"/> How well does your family manage change? Does anyone in your family get overwhelmed or stressed by changes? 	<ul style="list-style-type: none"> <input type="checkbox"/> The future: Suggest the family to make a list of their hopes, dreams, questions, concerns and anything else that may help them prepare for transition planning. <ul style="list-style-type: none"> <input type="checkbox"/> Managing changes: Support the family in anticipating changes to come and focus on their hopes, dreams, outcomes and vision for the future. <input type="checkbox"/> Outcomes: With the family and other team members, jointly develop an outcome (or outcomes) related to transition (as appropriate). <input type="checkbox"/> Transition activities: Complete transition planning worksheets and activities with the family and/or identify who else on the team can complete these activities with them. (Resource: When I’m Three Where Will I Be?) <input type="checkbox"/> Options: Partner with families to schedule site visits. You may visit with the sites with the family or work with them to identify another provider on the team who might be a support to them as they explore transition options. <input type="checkbox"/> IEP Meeting: (if applicable) Check in with the family to help them prepare any questions. You may even participate with them, or help them identify an available team member who can participate, if needed.
	<p><i>Before the Individualized Education Program (IEP) meeting ...</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> What questions have you prepared for the IEP meeting? <input type="checkbox"/> Do you feel comfortable attending the IEP meeting alone? <input type="checkbox"/> Do you feel like you need any additional resources or supports for the meeting? <input type="checkbox"/> Are there any questions I can help with? 	

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Exit	<p><i>Regardless of when exit takes place (at age three or sooner)...</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> What time and place work best for the exit meeting? <input type="checkbox"/> Who would you like to attend? <input type="checkbox"/> Would you like to prepare anything to share with the team prior to their exit (or graduation) from EI? <input type="checkbox"/> What resources in the community would you like to explore? <input type="checkbox"/> What supports do you want to connect with? 	<ol style="list-style-type: none"> 1. Exit Meeting: Schedule an exit meeting with the family on a day, time and location that works for them, fellow team members, and anyone else they would like to have participate in the meeting. 2. Discharge reports: Let family know that providers will prepare discharge reports (if used by the program). Ask them if they would like to prepare anything to share with the team prior to their exit (or graduation) from EI. 3. Community based resources and supports: Discuss any they would like to explore and work with them to ensure they have contact information and opportunities to connect with the resources and supports they seek.

Additional Resources:

- [Coaching during Service Coordination: What does it look like?](#) - archived webinar resources from [Division of Early Childhood \(DEC\) Service Coordination Community of Practice \(CoP\)](#)
- [Can Service Coordinators Use Coaching?](#) - blog post from [Early Intervention Strategies for Success Blog](#))
- [Yes Service Coordinators Can use Coaching](#) - free online course offered by Virginia Early Intervention Professional Development Program (VEIPD)
- [Coaching Families During Service Coordination: A Practice Guide](#) – paper by VEIPD