Foundations of Family Service Coordination

Supervisor's Guide

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How to Use This Guide

This guide is designed to be used by early intervention program directors, leaders, and mentors who directly train and support Family Service Coordinators in the NM FIT Program.

The guide provides an overview of the expectations for program leaders to support FSCs and follow the training pathway. The Table of Contents illustrates the various sections in the guide. In addition, all Participant Workbook activities include icons to support you in understanding the nature of the activity:

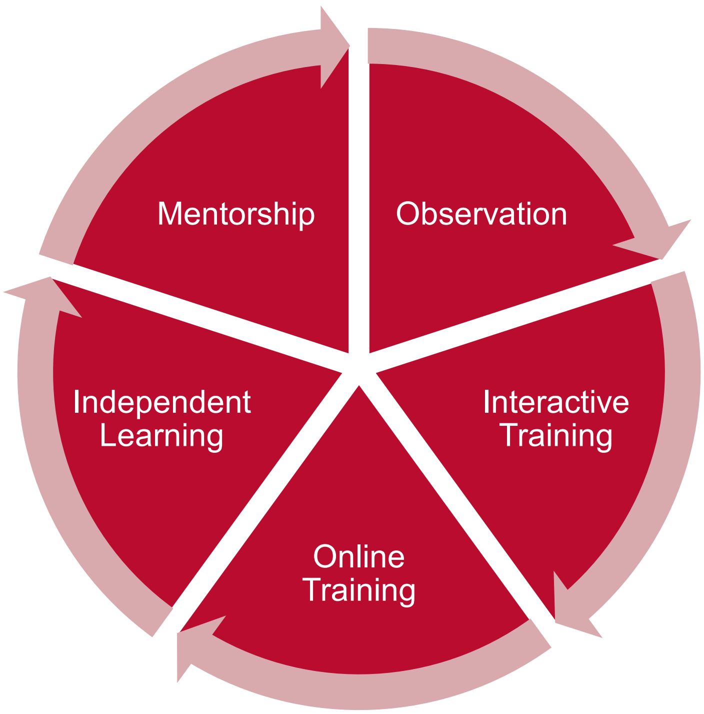
- FSC's complete these activities independently
- FSC's discuss with or interview a supervisor/mentor
- FSC's complete an observation with another FSC

Scavenger Hunt! Indicates an activity where the FSC needs to locate specific documents within the agency

For additional questions, please refer to the recorded FSC Training Launch session located on the FIT Portal https://cdd.health.unm.edu/ecln/

What to Expect

The Introduction to Family Service Coordination training pathway is based on adult learning principles and requires equal input from the learners, ECN trainers, and agency leadership. New Family Service Coordinators will participate in online learning, independent learning, agency mentorship, field observations, and interactive training throughout the 5 week training pathway. All of these components must be utilized to maximize learning and ensure the application of the content.



The training pathway is broken into four segments. Each segment consists of required online training, workbook activities (which include observation and mentorship opportunities), optional supplementary online training, and a required interactive session. It is highly recommended that learners participate in the optional online training that is presented in the pathway as it will provide a stronger foundation for topics that are discussed during the interactive training session.

Agency Support

The training pathway relies on agency-level support and mentorship to fully onboard new Family Service Coordinators.

<u>You can expect the online training to:</u>

- Provide an overview of the components of high-quality early intervention with a focus on the 8 Key Principles and the 3 Adopted Best Practices (FGRBI, TTA, Ongoing and Authentic Assessment)
- Focus heavily on the parent perspective and encourage service coordinators to think about the experience of the family above all else
- Provide prompts for new FSCs to follow up with agency mentors and supervisors to learn more about agency-specific processes related to content that is being covered

<u>To supplement the training, supervisors should plan to:</u>

- Meet with trainees regularly throughout the process to answer questions
- Assist with the completion of Workbook tasks related to agency-specific processes
- Share agency Policies and Procedures as well as Quality Assurance Plans
- Assign a more experienced "buddy" for the FSC to shadow and ask questions
- Provide examples of IFSPs for trainees to review
- Recommend supplementary training as appropriate for the trainee's level of knowledge
- Review the work of the trainee for several months following training to ensure application of knowledge and to provide guidance

Training and learning are not the same thing. You can take part in training, but that does not mean you will learn. Ongoing support is required to take knowledge and turn it into experience. Training is just one element of how we gain knowledge.

Supporting Staff with Training

Supporting Staff with the Pre-requisites

- Ensure that staff create an account in Moodle to access the online trainings
- Ensure that staff are accessing the correct training (sitting with new staff and walking them through this process is the best way to ensure that they have the correct information)
- Ensure that staff have downloaded the associated resources in the course and that they have them in a format that works for them (i.e. – they are printed if that is preferred)
- Use appropriate Supervisor Guides to check in with participants periodically *as they are completing the trainings*

Supporting Staff to access the training

- Ensure that staff have time to complete the correct pre-requisite online trainings and have downloaded the correct certificates
- Ensure that staff register quickly after registration opens and make sure they receive confirmation (a different account is required for registration)
- Help them schedule the required time into their calendar (i.e. – ensure that nothing is scheduled immediately before or after a session as missing portions of a session for travel reasons, etc. will result in NO CREDIT)
- Ensure this time is protected (no visits overlapping with session times; sufficient work-time to complete online and workbook activities, etc.)

Setting Staff up to participate in the training

- Ensure that staff have an **individual computer** with a working camera, speakers, and mic (Participants joining from a phone or tablet will NOT be permitted.)
- Assign a space for them to participate in the session
- Ensure the space is free from distractions (other people, noises, etc.). Please ensure that other staff members know not to disturb the participant during training.
- If a shared space must be used, ensure that the participant has working headphones
- TEST all equipment the day before the session
- Ensure that staff know how to troubleshoot tech or have someone available should there be a problem
- Ensure that staff have downloaded all of the required materials for the session and are ready to participate

Following up with Staff after the training

- Have a meeting time established on the calendar *prior* to the participant attending the session
- Following the session, keep the scheduled meeting time to discuss what the participant learned in the session and determine what next steps will support their ongoing learning (use the Supervisor Guide for FSC training as a support)
- Develop a plan with the participant to have occasional, ongoing discussions about their practice as it relates to the session information, etc.

Introduction to Family Service Coordination

Prerequisite

1. Part C Orientation Online Training (1 Hour)

Segment 1: Role of the FSC

1. Introduction to FSC Segment 1 Online Training (1 Hour)
2. Workbook Tasks
3. Interactive Training
4. Homework

Segment 2: The First 45 Days (2 Weeks to Complete)

1. Intro to FSC Segment 2 Online Training (3 Hours)
2. Workbook Tasks
3. *Optional: IFSP Online Training (6 Hours)*
4. *Optional: IDA for FSCs Online Training (1.5 Hours)*
5. Interactive Training
6. Homework

Segment 3: Ongoing Service Coordination (1 Week to Complete)

1. Intro to FSC Segment 3 Online Training (1 Hour)
2. Workbook Tasks
3. Watch recorded presentations from State Schools and Community Partners
4. *Optional: Foundations of Relationship Based EI Online Training (3 Hours)*
5. Interactive Training
6. Homework

Segment 4: Transition (1 Week to Complete)

1. Intro to FSC Segment 4 Online Training (2 Hours)
2. Workbook Tasks
3. Interactive Training
4. Homework (Review with Supervisor after Completion)
5. After Training Completion: New Mexico ECO System Online Training (2 Hours)(Supported by Supervisor)

Supplemental Training Resources

Child Development- Typical and Atypical

- Quorum Courses
  - Amazing Development: Infants
  - Amazing Development: Toddlers
  - Amazing Development: Preschool
- UNM Child Development Online Training
- Typical Development Online Resources (See Guide on FIT Portal)
- ECEP Office Hours Recordings on the FIT Portal

Understanding Part C Services and the IFSP

- PRO Training- Developing the Dream: Understanding the IFSP Process
- IFSP TA Document

Transition

- PRO Training- Next Steps to Success: Early Childhood Transition
- PRO Training- Let's Begin the Journey: Understanding the IEP Process
- Transition TA Document
- Transition Assessment Summary Form Webinar
- Finding Your Way: The Transition From Part C to Part B Webinar?

Supporting Families

- PRO Training- Introduction to PRO
- PRO Training- Keeping it All Together: Record-Keeping

Standards and Best Practice

- FIT Office Hours
- FGRBI Website- Videos and Print Resources
- FIT Standards and Definitions

SEGMENT 1: ROLE OF THE FSC

Prerequisite

1. Part C Orientation Online Training (1 Hour)

Segment Tasks

1. **Required: Introduction to FSC Segment 1 Online Training (1 Hour)**
2. Workbook Tasks
3. Segment 1 Interactive Training
4. Homework

Segment Components

1. Early Intervention in New Mexico

   An overview of the mission and vision of Early Intervention, service delivery model, and adopted best practices in New Mexico (FGRBI, TTA, Ongoing and Authentic Assessment).

2. Role of the Service Coordinator

   Introduction to the 7 steps of the family's journey through early intervention. Overview of the Knowledge and Skills for Service Coordinators and service coordination responsibilities as outlined in NMAC.

3. Working with Families

   A high-level overview of building strong partnerships with families including effective communication skills and supporting parents as advocates.

Early Intervention in New Mexico

Online Training Overview

- Overview of the departments and laws that govern early intervention in the US and New Mexico (OSEP, IDEA, FIT)
- Introduction to the 8 Key Principles
- Overview of the 3 Adopted Best Practices
  - Family Guided Routines Based Intervention
  - Transdisciplinary Team Approach
  - Ongoing and Authentic Assessment
- Introduction to how the IFSP should reflect Adopted Best Practices

Workbook Tasks

Knowledge Reflection- Independent Activity

Before you begin your training, take a minute to consider what you already know about the guiding principles and best practices of the New Mexico early intervention system and what you are still hoping to learn. Please think less about the rules and regulations (such as timelines and paperwork) and more about how families experience early intervention services.

Consider the following questions as you complete the first two columns on the chart:

- How does early intervention in New Mexico support children and families?
- What do early intervention services look like for families and children?
- What should a parent expect if their child qualifies for early intervention services?

Note: Please only complete the first and second column on the chart. You will complete the third column during the interactive sessions you attend later.

What I know about how early intervention services are delivered:	**What I still want to learn about how early intervention services are delivered:**	**What I have learned about how early intervention services are delivered:**
		Note: This column will be completed when you attend the interactive training session.

Role of the Service Coordinator

Online Training Overview

- Required qualifications for family service coordinators
- Most common models of service coordination (dedicated and dual-role)
- Introduction to the 7 steps of a family's journey through early intervention (Referral, Intake, CME, Eligibility Determination, Initial IFSP Meeting, Ongoing Services and Supports, and Transition)
- Introduction to the 13 FSC Responsibilities as outlined in NMAC
  - Informing the family about early intervention and their rights and procedural safeguards
  - Gathering information from the family regarding their concerns, priorities and resources
  - Coordinating the evaluation and assessment activities
  - Facilitating the determination of the child's eligibility
  - Referring the family to other resources and supports
  - Helping families plan and prepare for their IFSP meeting
  - Organizing and facilitating IFSP meetings
  - Arranging for and coordinating all services listed on the IFSP
  - Coordinating and monitoring the delivery of the services on the IFSP to ensure that they are provided in a timely manner
  - Conducting follow-up activities to determine that appropriate services are being provided
  - Assisting the family in identifying funding sources for IFSP services
  - Facilitating periodic reviews of the IFSP
  - Facilitating the development of the transition plan and coordinating transition
- Introduction to the Knowledge and Skills for Service Coordinators
  - **Infant and Toddler Development**: Demonstrate knowledge of infant and toddler development including factors that contribute to development such as family context, relationships, culture, socio-economic considerations, environment, and experiences to inform intervention decisions, child development, and learning within natural environments.
  - **Family-Centered Practices**: Respect and support the distinctive qualities of each family, recognizing the family as the teacher, support, decision-maker, and advocate for their child.
  - **Leadership/Teaming**: Be an effective leader by building professional, supportive partnerships with families; collaborating and teaming with IFSP team members to include family members; and engaging/collaborating with a variety of community partners.
  - **Coordination of Services**: Coordinate and monitor the timely delivery of identified evidence-based early intervention services.

Role of the Service Coordinator

Online Training Overview, Continued

- Introduction to the Knowledge and Skills for Service Coordinators, continued
    - **Transition**: Implement smooth and effective transition plans with the family that identify the events, activities, and processes associated with key changes between environments or programs during the early childhood years.
    - **Professionalism:** Demonstrate professionalism by using personal and professional boundaries, flexibility, resiliency, time management, dependability, and by engaging in ongoing professional development.
- Overview of the importance of supporting parent advocacy

Workbook Tasks

Knowledge and Skills Self Reflection- Independent Activity
Take a moment to review the Service Coordination Knowledge and Skills (Infant and Toddler Development, Family-Centered Practices, Leadership/Teaming, Coordination of Services, Transition, Professionalism)

Reflect on the following questions:
- Which of these skills are your strengths?
- Are there any other skills or strengths you would like to develop?
- Who at your agency can help you grow as a Service Coordinator?

Working with Families

Online Training Overview

- The importance of a strong, trusting partnership between caregivers and the FSC
- Parent perspective on the importance of building a relationship with their FSC
- Skills for effective communication
    - Give families your full, undivided attention
    - Be impartial and avoid making judgments about families
    - Paraphrase what the parent has said to ensure your understanding
    - Listen for feelings and pay attention to body language
    - Summarize what was discussed at the end of each conversation
- Identifying the expertise that the family brings to the partnership (their child's strengths and needs, their family's routines, hopes and dreams) and the expertise that the FSC brings to the partnership (knowledge of the FIT system and philosophy, child development, community and agency resources and supports)
- Empowering families to be advocates
    - Do WITH families, not FOR them
    - Respect family values and beliefs
    - Follow the family's lead with priorities and pace
    - Meet the family where they are- don't push them to move too fast too soon
    - Provide a consistent message regarding the philosophy of early intervention, the values of the family, and the planned course of action
    - Provide families with accurate information- it's okay to say "Let me get back to you!" if you need to find the answer to a question

Workbook Tasks

Successful Partnerships- Independent Activity

- Jot down knowledge and skills that a family may bring to the partnership. Then jot down what you think you can bring to the partnership.

Families Bring…	As an FSC I Bring…

Segment 1: Role of the FSC

Interactive Training

During the interactive training, participants will:

- Learn about the mission of EI
  - Our goal is to support the caregivers so that they can support their children
  - Caregivers are the agents of change- we do WITH families, not FOR families
  - Building caregiver competence and confidence leads to better outcomes for kids
- Review the 8 Key Principles
- Describe the difference between a Medical Model of intervention and a Family Guided, Routines Based, Coaching model of intervention
- Identify the main components of New Mexico's three Adopted Best Practices:
  - FGRBI
  - TTA
  - Ongoing and Authentic Assessment
- Review the Role of the Family Service Coordinator according to NMAC
- Review the Knowledge and Skills for Service Coordinators
- Review the Knowledge and Skills for Service Coordinators (cont.)
- Identify their current strengths and areas for growth as they relate to the Knowledge and Skills for Service Coordinators (KSSC)
- Learn about the two Parent Support Centers in New Mexico (Parents Reaching Out and Education for Parents of Indigenous Children with Special Needs)
- Identify the actions they can take to facilitate parent advocacy
  - Ensure parents knows their rights
  - Understand and support family priorities, values, beliefs, and culture
  - Orient families to the systems, processes and philosophy of EI and other early childhood systems
  - Ask questions that help clarify the family's goals
  - Help caregivers prepare for meetings
  - Do WITH and not FOR
- Identify effective communication skills and ways to build rapport with families
- Hear from caregivers about the important role that FSCs played for their family
- Differentiate between the expertise that FSCs need to provide to families (mission and philosophy of EI, timelines and processes for EI, child development, resources) and the expertise that families need to provide (their child's strengths and needs, their family's routines, hopes and dreams for their child)

Supplemental Resources

New Mexico Family Infant Toddler (FIT) Program
Key Principles for Providing Early Intervention Services.

In 2007, an Office of Special Education Programs (OSEP) Community of Practice developed seven "Key Principles." [1]

The NM FIT Program has added an 8th key principle related to reflective practices.

NM – FIT Program Key Principles:

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.

NM8. Support for families in developing strategies to understand, interpret and nurture their child's development is best achieved through the use of reflective practices.

Following are descriptions of the key concepts behind each of the key principles as well as practical examples of what each key principle "looks like" and "does not like" in practice. . [2]

[1] *Workgroup on Principles and Practices in Natural Environments (November, 2007) . OSEP TA Community of Practice-Part C Settings. http://www.nectac.org/topic/famiies/families.asp.*

[2] *Workgroup on Principles and Practices in Natural Environments (February, 2008) Seven key principles: Looks like / doesn't look like. OSEP TA Community of Practice- Part C Settings.http://www.nectac.org/topics/natenv/natenv.asp* ***Workgroup Members:*** *Susan Addision, Betsy Ayankoya, Mary Beth Bruder, Carl Dunst, Larry Edelman, Andy Gomm, Barbara Hanft, Cori Hill, Joicey Hurth, Grace Kelley, Anne Lucas, Robin McWilliam, Stephanie Moss, Lynda Pletcher, Dathan Rush, M'Lisa Shelden, Mary Steenberg, Judy Swett, Nora Thompson, Julianne Woods, and Naomi Younggren.*

Note: Participants will be provided with the 9-page Key Principle document that includes the "Looks Like" and "Doesn't Look Like" examples for each Key Principle.

Segment 1: Role of the FSC

Supplemental Resources

NATIONAL
Service Coordination
TRAINING WORKGROUP

<u>Knowledge and Skills for Service Coordinators (KSSC)</u>

Developed by the Workgroup on Recommended Knowledge and Skills for Service Coordinators (RKSSC), National SC Leadership Institute Group (a subgroup of the National SC Training Workgroup) with guidance and support from the Division for Early Childhood (DEC) and the Early Childhood Personnel Center (ECPC).

***Workgroup on Recommended Knowledge and Skills for Service Coordinators (RKSSC):**
**This Workgroup was formed to develop Recommended Knowledge and Skills for Service Coordinators. Upon completion of the task, Knowledge and Skills for Service Coordinators (KSSC) was adopted.*

Leaders: Melissa Hardison (KY), Cori Hill (VA) and Sarah Nichols (IL)

Members: Rachel Charlot (IA), Freda Collins (DE), Moniqua Johl (CO), Maria Kastanis (IL), Cathy Riley (NM) and Melissa Schnurr (IA)

Purpose:

To provide awareness of the foundational knowledge and skills that are necessary for quality service coordination in early intervention.

Suggested Use:

Implementation and use of the KSSC is voluntary and the KSSC is not intended to be an exhaustive list. States, programs and territories may already have components of the KSSC included in core competencies or pre-service training and may choose to:

- use the KSSC as appropriate to build, support or augment system-specific requirements for determining desired knowledge, skills and abilities during hiring, training, and preparing service coordinators, and/or
- develop examples regarding what each recommendation looks like in practice to illustrate, explain or assess knowledge and skills.

Please use the following citation when referring to this work:

Workgroup on Recommended Knowledge and Skills for Service Coordinators (RKSSC), National Service Coordination Leadership Institute Group. (2020). Knowledge and Skills for Service Coordination. Retrieved from https://tinyurl.com/KSSC-8-12-20Final

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Segment 1: Role of the FSC

Supplemental Resources

NATIONAL
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TRAINING WORKGROUP

Knowledge and Skills for Service Coordinators (KSSC)

As the cornerstone of early intervention (EI) supports and services, Service Coordinators carry out all activities and responsibilities as identified under Part C of IDEA (303-34.) These activities include serving as the single point of contact to assist families in obtaining access to and coordinating needed early intervention services and other services identified in the Individualized Family Service Plan (IFSP). Service Coordinators should adhere to Part C of IDEA and align their practices with the DEC Recommended Practices (DEC RPs), the DEC Priority Issues Agenda, and the Agreed Upon Mission and Key Principles For Providing Early Intervention Services in Natural Environments.

In April 2020, the National SC Leadership Institute Group, in partnership with DEC and the Infant and Toddler Coordinators Association (ITCA), disseminated a nationwide survey to determine if the DRAFT Recommended KSSC:

1) describe the knowledge and skills service coordinators should possess, and

2) provide a clear statement of what a service coordinator should know and be able to do upon completion of service coordination preparation/training.

Of the 1002 respondents from 42 states, 68% represented service coordinators and 18% were administrators/supervisors. Forty-four percent (44%) had more than 10 years of experience in early intervention. Overall, respondents were in strong agreement with the KSSC and 89% of respondents found them to be comprehensive and complete. To learn more about the survey findings and how the information was used to finalize the KSSC visit DRAFT RKSSC Nationwide Survey Highlights & Response to Suggestions. An infographic, visual aid, and crosswalk are also available for additional historical information regarding the development process of the knowledge and skills. Upon completion of the survey, the *Recommended* Knowledge and Skills for Service Coordinators was finalized and renamed as Knowledge and Skills for Service Coordinators.

KSSC:

1. **Infant and Toddler Development:** *Service Coordinators demonstrate knowledge of infant and toddler development including factors that contribute to development such as family context, relationships, culture, socio-economic considerations, environment, and experiences to inform intervention decisions, child development and learning within natural environments.*

   Service Coordinators demonstrate the ability to:

   1.1. Explain developmental delays and disabilities and their impact on children's development and learning to support intervention decisions.

   1.2. Apply knowledge of typical development, individual differences, and cultural and linguistic diversity to support each child's development and learning within natural environments.

Supplemental Resources

1.3. Support families in their understanding of child development, how each developmental domain contributes to the whole child, and how ongoing progress is monitored.

2. **Family-Centered Practices:** *Service Coordinators demonstrate ability to respect and support the distinctive qualities of each family, recognizing the family as the teacher, support, decision-maker and advocate for their child.*

Service Coordinators demonstrate the ability to:

2.1. Recognize implicit biases and respect the unique qualities of each family (e.g. culture, dynamics, roles, values and practices, etc.) to identify their priorities and needs.

2.2. Comprehensively explain family rights and procedural safeguards to families in understandable terms, including when and how they may be applied, to support them in advocating for their child and family.

2.3. Promote engagement and family capacity-building to address their priorities and concerns, by supporting them to identify opportunities to achieve goals for their family and child's development and learning.

3. **Leadership/Teaming:** *Service Coordinators demonstrate ability to be an effective leader by building professional, supportive partnerships with families; collaborating and teaming with IFSP team members to include family members; and engaging/collaborating with a variety of community partners.*

Service Coordinators demonstrate the ability to:

3.1. Use effective teaming and collaboration practices in order to support families and other professionals in carrying out the IFSP.

3.2. Partner with families to identify, share, and access available community resources/services, parent groups, and state/local advocacy organizations.

4. **Coordination of Services**: *Service Coordinators demonstrate ability to coordinate and monitor the timely delivery of identified evidence-based early intervention services.*

Service coordinators demonstrate the ability to:

4.1. Comprehensively orient all families to the early intervention system and discuss formal and informal supports, and opportunities available to them.

4.2. Explain to families how early intervention is funded and answer any questions related to systems of payments in understandable terms.

4.3. Coordinate evaluations and assessments, identify and facilitate the multidisciplinary eligibility determination process, and ensure family participation through this process.

4.4. Facilitate IFSP development (initial, reviews, annuals) including functional outcomes addressed within family routines and natural environments.

4.5. Monitor progress and timely delivery of services in accordance with the IFSP.

Supplemental Resources

4.6. Partner with families to coordinate educational, social, and medical services that the child needs or is being provided outside of EI.

5. **Transition:** *Service Coordinators implement smooth and effective transition plans with the family that identify the events, activities, and processes associated with key changes between environments or programs during the early childhood years.*

   Service Coordinators demonstrate the ability to:

   5.1. Partner with families to plan and implement appropriate and individualized events, activities, and processes that support transitions across settings, agencies, and throughout the early intervention process.

   5.2. Manage required timelines, processes, and documentation to support successful transitions.

   5.3. Support a variety of planned and timely strategies for successful adjustment and positive outcomes for both the child and family as they exit early intervention.

6. **Professionalism:** *Service Coordinators demonstrate professionalism by using personal and professional boundaries, flexibility, resiliency, time management, dependability, and by engaging in ongoing professional development.*

   Service Coordinators demonstrate ability to:

   6.1. Apply organizational skills to meet and manage required timelines and documentation.

   6.2. Reflect and evaluate current practices to determine strengths and areas of growth to access professional development to improve practices.

   6.3. Set personal and professional boundaries and use leadership skills, applying ethical practices, policies and procedures in relationships and interactions.

SEGMENT 2: THE FIRST 45 DAYS- REFERRAL TO IFSP

Segment Tasks

1. **Required: Intro to FSC Segment 2 Online Training (3 Hours)**
2. Workbook Tasks
3. Optional: IFSP Online Training (6 Hours)
4. Optional: IDA for FSCs Online Training (1.5 Hours)
5. Interactive Training
6. Homework

Note: Participants should complete the required online training before completing optional online training. The optional training is highly recommended as it will expand upon the components covered in this segment of training. Participants will have TWO WEEKS to complete the online components of this segment before the interactive training.

Segment Components

1. First Contacts

   The referral process and the purpose of the first contacts, including the initial phone call to the family and the intake process

2. Intake Part 1: Preparing for Intake

   Gathering and sharing information during the "first phone call".

3. Intake Part 2: Gathering and Sharing Information at Intake

   Overview of the types of information that FSCs need to present to families and the information they need to gather.

4. Intake Part 3: The Family Interview

   How to conduct an effective family interview with an emphasis on collecting high-quality functional information about typical routines and activities.

5. Preparing Families for the Evaluation

   Ensuring that families know what to expect during the CME process.

6. Determining Eligibility

   Supporting families during the eligibility determination process.

7. IFSP Part 1: Preparing the Family for the IFSP

   Supporting families to be active participants in the initial IFSP meeting.

8. IFSP Part 2: FSC's Role as a Facilitator

   Overview of general facilitation skills that service coordinators need.

9. IFSP Part 3: Facilitating the IFSP Meeting

   How to facilitate the writing of the initial IFSP with an introduction to the specific components of the IFSP.

First Contacts

Online Training Overview

- The First Contacts include the referral, first phone call, and intake visit. They lay the foundation for a trusting relationship between the family and the service coordinator
- The purpose of the initial contact with a family is to
  - Establish rapport
  - Support families to understand that they are the experts on their child and that EI is a system of supports for them
  - Gather basic information from the family
  - Share information about early intervention including the philosophy of EI and the method of service delivery (including the three adopted best practices)
- Families will receive lots of information during this part of their journey. Information will need to be repeated more than once and service coordinators should check in frequently to ensure understanding
- Parent perspective on how to help families understand the philosophy of early intervention and the family's role
- A referral is made to EI when someone has a concern about the development of a child
  - Can be made by family or another individual/agency (with parental consent) such as a doctor, CYFD, Home Visiting, Child Care Providers, etc.
  - Includes the date of the referral, family's name, address, telephone number and reason for referral
  - Every agency has their own process for handling referrals
  - FSCs are usually responsible for scheduling and ensuring that IFSP is in place within 45 days

Workbook Tasks

Referral Activities- Supervisor or Mentor Interview

- Identify who completes the referral activities in your office. If you have responsibilities related to referral activities, please list them in the space provided below.
- If applicable, what are your specific responsibilities related to referral activities? Discuss with your supervisor/mentor and take notes below.
- **Scavenger Hunt!** Locate your agency's Policies and Procedures and review the section on referrals. Note any additional questions that you may have.

Intake Part 1: Preparing for Intake

Online Training Overview

- First contact must be made within two days of referral
  - Usually done by phone but may be done via email or, if you are unable to contact the family through other methods, by letter
  - Before contacting the family, review the age of the child, the reason for the referral, any diagnosis listed, other medical records
- The main goal of the first phone call is to begin gathering and sharing information. Family service coordinators will
  - Begin introducing early intervention to caregivers
  - Begin to gather information about the reason for the referral
  - Schedule the intake visit, if the parent would like to proceed
- This is just the beginning of the conversation and will help families decide if they want to proceed with intake and evaluation.
- The first phone call is an essential step in building rapport
- Parent perspectives on how FSCs can support a family during this first contact and prepare them for the intake visit
- Family service coordinators should be prepared to answer some frequently asked questions
  - Is a medical referral required? No
  - Is a medical diagnosis required? The team will need to know about medical diagnoses to determine eligibility, but medical diagnoses do not need to be discussed during the first phone call
  - Do I need to provide a social security number or citizenship information? No
  - Do I need to pay for services? No

Workbook Tasks

Organizing and Preparing for Intake Visits- Supervisor/Mentor Interview

Please talk to at least two of your fellow family service coordinators and learn about what they to do help them organize and prepare the information that they need to bring to an initial visit. Find out if they use a checklist and/or have a prepared packet and decide if this organizational strategy is something you would like to try.

Strategies I would like to try include:

Please remember to review your responses with your supervisor/mentor.

Intake Part 2: Gathering & Sharing Information at Intake

Online Training Overview

NOTE: This module utilizes the FIT Family Handbook as a resource for Family Service Coordinators to understand and explain the FIT system to families. Trainees should have access to a copy of the FIT Family Handbook as they progress through this module.

- Intake is an opportunity to expand upon the information exchange that began during the first phone call
- The intake process can be overwhelming for families and service coordinators should follow each family's lead. Some families will be ready to share a lot of information very quickly, some will need reassurance and support to open up.
- At the intake visit, the Service Coordinators will review the Family Handbook with families to:
  - Gather information about what brought the family to early intervention, their concerns, their priorities
  - Describe the role of the service providers and FSC in early intervention
  - Orient parents to the CME process
  - Orient families to the IFSP and the process for drafting the IFSP
  - Introduce Transition
  - Introduce the Early Childhood Outcomes (ECO)
  - Introduce required FIT Forms
    - Freedom of Choice
    - Public Private Insurance
    - Family Rights and Parental Safeguards (NOTE: Families must receive a copy of the Family Rights and Parental Safeguards and FSCs must review this document with families. Only reviewing the Rights and Safeguards that are in the Family Handbook is NOT sufficient)
    - PWN
    - Obtain ROIs, as necessary
- Families should be encouraged to use the questions in the Family Handbook to prepare for the rest of the intake process
- A PWN is required before the evaluation, to establish or change eligibility, to propose or change services, to change the ongoing location or frequency of services
- The intake visit is an opportunity to establish parents as the experts on their child and encourage their advocacy during the intake process

Intake Part 2: Gathering & Sharing Information at Intake

Workbook Tasks

Explaining Early Intervention Activity- - Independent Activity

Inevitably, someone will ask you about working in early intervention! It could be a friend, your neighbor or a new family you are working with in early intervention. If you were to explain what early intervention is, what are the key elements you would include? Please refer to page 5 of the FIT Family Handbook if you need ideas!

Understanding the Consent Forms- Supervisor/Mentor Interview

Locate all of the consent forms required for the intake visit. Spend some time familiarizing yourself with the language in the consent forms. Then complete the following activity: Read through the consent forms and make a note or circle directly on the forms anything that you have questions about. Follow up with your supervisor/mentor and have them explain them to you and answer your questions. Remember, if you don't understand what it means you won't be able to explain it to the family.

Intake Part 3: The Family Interview

Online Training Overview

- The Family Interview is a routines-based conversational interview about the family's daily routines and activities
- This information is used to identify the family's priorities, write IFSP Outcomes, identify possible IFSP strategies, and determine appropriate service.
- The concept of gathering information about family's routines to develop IFSP outcomes was originally developed by Dr. Robin McWilliam and called the Routines Based Interview or RBI. New Mexico does not use the official RBI, but does use a routines based approach to conduct the family interview
- To introduce the family interview, the FSC should
  - Explain why they are conducting the interview and how the information will be utilized
  - Explain how the information will help potential direct service providers embed interventions into the family's routines
  - Explain how the information will be used to develop meaningful outcomes and strategies
  - Explain how the information may help to plan the evaluation session
- Parent perspective on how it feels to participate in the family interview and tips for FSCs on how to make caregivers feel more comfortable
- Suggestions on how to explain the family interview and guidance on using the "Our Child's Day" worksheet in the Family Handbook to help families prepare
- Examples of routines and the difference between routines and schedules
  - Information on routines includes who the child spends time with, where the routine takes place, what occurs during the routine, and which routines are challenging or going well

Intake Part 3: The Family Interview

Workbook Tasks

Agency Interviewing Tools- Supervisor/Mentor Interview

Ask your supervisor/mentor to help you locate the tools that your agency uses to complete the interview with the family. Discuss the following questions and anything else that you are wondering about:

- How do you access the tool(s)?
- Are any tools used as a guide/prompt only?
- What is the expectation for how they are completed? (e.g. – handwritten, typed, etc.)

Observations of an Intake- Field Observation

Below is an observation form for you to use when you have the opportunity to observe another FSC conducting an Intake. Please use the prompts to guide your observations and be sure to note any questions that you have to discuss with your supervisor/mentor.

Use the form below to jot down your observations about the following aspects of the Intake. Be sure to include any language/descriptions you like and might want to use in your own practice.

- How does the FSC introduce themselves to the family?
- How does the FSC begin the visit with the family? (What do they ask about first or what do they explain first?) How does the family respond?
- What does the FSC do to build rapport with the family? (note specific behaviors, ways of speaking, etc.)
- How does the FSC explain the purpose of the Family Interview?
- How does the FSC introduce and describe the following forms:
    - Freedom of Choice Form, FIT Family Handbook, Child/Family Rights & Safeguards, Race & Ethnicity Form, Public & Private Insurance Form, Consent for Evaluation, Release of Information
- List the SPECIFIC parental concerns that you hear:
- List the SPECIFIC family routines that you hear AND how they relate to the concerns (if expressed).
- List any questions that you would have liked to ask the family that were NOT asked.
- List any additional observations about the family here. For example, did they seem open to participating in the program? Did they seem more hesitant? If yes, what tells you this?
- Questions that I want to ask my supervisor/mentor.

Preparing Families for the Evaluation

Online Training Overview

- Defining evaluation vs. assessment (see workbook activity for definitions)
- According to IDEA, “evaluations” must
    - Be timely (completed quickly enough to initiate IFSP within 45 days)
    - Be comprehensive (evaluate all 5 developmental areas)
    - Be multidisciplinary (involve at least two professionals from different disciplines)
    - Use appropriate methods (conducted by personnel trained in the use of the tool)
    - Conduct a review of medical records
- FSC must prepare the family for the CME by
    - Explaining the purpose to the family
    - Explaining the process to the family
    - Explaining Family Rights and Safeguards
    - Providing Prior Written Notice and obtaining consent
- Parent perspective on what it felt like to prepare for the evaluation
- FSCs coordinate the evaluation session by
    - Determining who will be needed
    - Sharing available information with the team
    - Arranging when and where the evaluation will take place
    - Arranging for interpreters, if necessary
- FSCs may play additional roles, depending on their agency, including
    - Facilitating the CME session by supporting the family to understand the process, share information, and ask questions
    - Support the family in understanding the results and informing the family of next steps
- Managing CME responsibilities when you are dual role FSC/DS
- How to utilize the Family Handbook to prepare families for the CME
- Ensuring that the family feels comfortable and supported throughout the CME process

Preparing Families for the Evaluation

Workbook Tasks

Evaluation vs. Assessment-Supervisor/Mentor Interview

The definitions below are from NMAC. Please review these definitions, note any questions you have, and discuss them with your supervisor/mentor.

> **"Evaluation"** means the procedures used by qualified personnel to determine a child's initial and continuing eligibility for FIT services. It includes a review of records pertinent to the child's current health status and medical history; parent interview and parent report; observation of the child in natural settings; informed clinical opinion; use of FIT Program approved assessment tool(s); and identification of the level of functioning of the child in each developmental area -- cognitive, communication, physical/motor (including vision and hearing), social or emotional, and adaptive. An initial evaluation refers to the child's evaluation to determine his or her initial eligibility for FIT services.
>
> **"Assessment"** means the ongoing procedures used by qualified personnel to identify the child's unique strengths and needs and the early intervention services appropriate to meet those needs throughout the period of the child's eligibility for FIT services. Assessment includes observations of the child in natural settings, use of assessment tools, informed clinical opinion, and interviews with family members. Assessment includes ongoing identification of the concerns, priorities, and resources of the family.

Discuss the following questions related to ongoing and authentic assessment with your supervisor/mentor and note the answers below.

- How do teams gather ongoing assessment information about children and families?
- How is this information shared with other team members?
- What is the process for updating the ongoing assessment tool in an ongoing and authentic way?

Explaining the Process and Roles-Independent Activity AND Supervisor/Mentor Interview

Reflect on what you heard in the parent perspective video about the questions and concerns a family might have about this step in their journey. Then, review the evaluation section of the Family Handbook. Given this information, how would you explain the CME process to a family? Write down what you might say as well as how you might use the Evaluation Worksheet questions provided in the Family Handbook to help a family prepare.

With your supervisor/mentor, discuss the CME process at your agency. Use the space below to take notes on your role in this process, how it is coordinated, etc. so that you clearly understand how to follow your agency's procedures and explain them to families. You may also want to ask your supervisor any questions that you have about the evaluation process after reviewing the information provided in the Family Handbook.

Determining Eligibility

Online Training Overview

- The FSC must ensure that the evaluation team completes the required steps in the evaluation process including
  - Assuring that the CME team includes two professionals from different disciplines
  - Supporting the caregivers to be full participants in the process
  - Assuring that the proper documentation has been obtained to support the eligibility
  - Providing the caregiver with Prior Written Notice regarding the eligibility
- The evaluation team must look at the whole child including what the child enjoys, how the child participates in routines, and with whom the child interacts as such, the FSC must gather this information from the family
- Review of eligibility categories and differences in EI eligibility between different states
- A child's eligibility category may change over time or a child may gain the needed skills and no longer be eligible for services
- Allowable service hours for at-risk eligibility categories
- An ICD-10 code must be listed for all eligible children
- A CME report must be written within 30 days of the evaluation
- Families must have the results from the CME explained to them before the IFSP
  - An evaluation team member should take the lead on this discussion but the FSC should ensure that the family has all of their questions answered and that they feel comfortable with the results before moving on to the next steps
- Parent perspective on how to explain evaluation results to a family
- Next steps when a child is eligible (develop an IFSP) or is not eligible (provide strategy recommendations, refer to other community programs, ensure that the family knows who to contact if they have continued concerns)

Workbook Tasks

CME and Eligibility: Your Agency Process- Independent Activity & Supervisor/Mentor Interview
Find a copy of the CME Report template and a completed example of a CME report in your agency. Note the places where family routines are included and how eligibility is recorded. Note anything that stands out to you and discuss it with your supervisor/mentor. Also discuss:

- anything else about the CME that was not yet discussed,
- the eligibility determination process, and
- the process for writing up the CME report.

Supporting Parents-Supervisor/Mentor Interview & Independent Activity
What is the process for reviewing the results of the evaluation with the family in your agency? Do you have a role in this process? If so, what is it? After hearing the family perspective on the eligibility discussion, what might you do in your own practice to support families at this stage of their journey?

The IFSP Part 1: Preparing the Family for the IFSP

Online Training Overview

- Defining IFSP
  - Individualized- the plan is unique for each child and family
  - Family- the family is involved in each step of the process and the plan is centered around their priorities and concerns
  - Service- the plan is a contractual relationship in which the EI agency agrees to provide services as listed
  - Plan- A fluid document that changes as the needs of the family and child change
- The IFSP is more than filling out a form-the FSC must ensure that it is a collaborative process that meets the needs of the child and family
- Types of IFSPs (Interim, Initial, Annual)
- The FSC has tasks to complete before the IFSP meeting and during the meeting
  - Before the IFSP: Prepare the family by ensuring they understand the results of the evaluation and their rights; determine who will attend the meeting as well as the location and time; provide the family with Prior Written Notice of the meeting
  - During the IFSP: Facilitate the flow of the meeting; ensure parents are active participants; ensure the IFSP form is completed accurately based on the discussion
- Prior Written Notice must be provided at least five-days prior to meeting
- Components of the Family Handbook that will help prepare the family
  - Blank IFSP
  - “Things to Consider as You Prepare to Develop Your Family’s IFSP”
  - “Places We Go-Things We Do”
- Parent perspective on how FSCs can prepare families for the IFSP meeting

Workbook Tasks

Preparing for the Meeting: Your Agency Process-Supervisor/Mentor Interview

What is your agency’s process for selecting providers to attend the initial IFSP meeting? As the Family Service Coordinator, what are the steps that you will need to take to ensure that the proper providers are present at the IFSP meeting?

Preparing the Family-Independent Activity

Review the sections (1) *Things to Consider as You Prepare to Develop Your Family’s IFSP* and (2) *Places We Go – Things We Do* in the Family Handbook. Jot down some ideas of how you might discuss these two sections with the family to help them prepare for the IFSP meeting.

Things to Consider as You Prepare to Develop Your Family’s IFSP	Places We Go – Things We Do

The IFSP Part 2: FSC's Role as Facilitator

Online Training Overview

- Defining facilitation- to make something easier; to help something run smoothly and effectively
- Each IFSP meeting has similar components (the tasks that need to be accomplished, components of the IFSP, agenda, and paperwork) and some that are different (makeup of the team, the family's priorities, settings where the child and family spend time, the family's desired outcomes). The FSC must be ready to meet the needs of each unique family
- Roles of the facilitator
    - Manager/Leader- scheduling the meeting, preparing the agenda, make introduction, identify meeting objectives, manage group discussions and professional courtesies
    - Gatekeeper- ensure that all necessary tasks are accomplished, ensure that all members are contributing, ensure that the 8 Key Principles are being upheld
    - Timekeeper- ensure that the meeting starts and ends on time
    - Consensus Builder- ensure that all voices are heard and that the group comes to mutually acceptable agreements
- Facilitation Tips
    - Identify meeting objectives, the time needed for the meeting, and the responsibilities of all participants before the meeting
    - Make sure the family knows the role of each person participating in the meeting
    - Establish an agenda
    - Establish ground rules or "meeting manners"
    - Invite quiet members to speak and provide opportunities for the family to speak
    - Be flexible if the family needs more time to understand the process or the group cannot come to consensus
    - Give yourself plenty of time so that you don't feel rushed

Workbook Tasks

Effective Facilitation-Independent Activity

Please respond to the following questions:
1) What do you think of when you think of a "facilitator"?
2) What skills do you think are important for a facilitator to be effective?

Facilitation Roles-Independent Activity

Consider the roles of a facilitator (Manager/Leader, Gatekeeper, Timekeeper, Consensus Builder) and rate yourself for each using the following scale. Then consider where you might seek more professional development.

4 - Very Confident	*3 - Confident*	*2 - Need More Practice*	*1 - HELP!*

Consider what resources you could access, including people, that could support you in any area where you need support or more practice. How do you plan to work on any area where you want to strengthen your skills?

The IFSP Part 3: Facilitating the IFSP Meeting

Online Training Overview

NOTE: This module provides information on how to use the framework offered in the IFSP form to guide the flow of the IFSP meeting. It does not cover specifics of how to fill out the form itself. For more information on filling out the IFSP form, please see the IFSP online training modules.

- The development of the IFSP is the culmination of all of the activities that led up to the meeting including intake, the family interview, the CME, etc. It is built on the priorities and goals of the family.
- Do not let the paperwork interfere with your ability to facilitate and participate in rich conversations about the child's needs and intervention plan
- The steps of the IFSP meeting should include
  - Setting the stage for the meeting by sharing introductions and the agenda
  - Supporting the family to share their desired future for their child
  - Reviewing and discussing the family's concerns
  - Reviewing and discussing the child's present strengths, abilities and needs
  - Determining the outcomes and strategies
  - Discussing which supports and services are needed and determining the Lead Interventionist
  - Determining when, where and how services and supports will be delivered
- How to participate in the meeting if you are dual role FSC/DS
- Before the meeting, ensure you have gathered all of the necessary information and drafted the sections of the IFSP that should contain information already gathered
  - Family Life can be drafted with information already gathered during the intake
  - Relevant Health Information can be drafted with information gathered from the family and medical records
  - PASN can be drafted with information gathered from the family and evaluation process; this should contain functional information on how the child is participating in routines, NOT performance on individual test items
- Information that is drafted before the meeting should ALWAYS be reviewed at the meeting and updated or changed as necessary based on input from the family or team
- Parent perspective on how to help parents articulate their hopes and dreams
- Difference between Early Childhood Outcomes and IFSP Outcomes

The IFSP Part 3: Facilitating the IFSP Meeting

Online Training Overview, Continued

- During the meeting, the team will
  - Write Child and Family Outcomes and Strategies based on the child's needs and the family's priorities. Outcomes must:
    - include a way to measure progress including procedures, criteria, and a timeline
    - be written in the family's words with support from the FSC to "paint a picture" of what the family would like to see the child doing
    - focus on everyday routines, activities, and places
  - Determine the supports and services needed to meet the Outcomes including:
    - Who is best suited to be the Lead Provider? What other providers should support the Lead Provider through co-visits or consultation?
    - How frequently will the services take place?
    - Where will the services occur?
    - What is the service delivery method? (ongoing, consultation, E&A, etc)
    - What is the funding source?

The IFSP Part 3: Facilitating the IFSP Meeting

Workbook Tasks

Step One: Set the Stage-Independent Activity AND Supervisor/Mentor Interview

Take a moment to review this sample agenda for an IFSP meeting and answer the questions below:

IFSP Meeting Agenda

Attendees: Name(s)

1. Introductions
   - Family Service Coordinator will ensure that the family and all attendees, including the role they are playing in the meeting, are introduced
   - Family Service Coordinator will remind everyone of the time the meeting must end as well as any "meeting manners" such as turning off cell phones, etc.
2. Purpose of the meeting
   - To develop an Individualized Family Service Plan (IFSP) to support your child and family
3. Review of evaluation results and recommendations (if needed)
   - Discussion of the results from the evaluation and any potential recommendations from the team
   - Review the information about the Child's Present Abilities, Strengths and Needs and update information if needed
4. Discuss or review your family's desires for your child's future
5. Review information gathered from the family interview, update information as needed
6. Develop child and family outcomes
7. Decide on the most appropriate services and supports to meet the outcomes
8. Complete the necessary sections of the Transition Plan in the IFSP
9. Review parent rights for the IFSP signature page
10. Discuss next steps

Thank you for inviting us into your home.
We look forward to working with you!

- Does your agency have an agenda that they use to support IFSP meetings? If so, how does it compare to this sample?
- How might you use this sample agenda to help you prepare yourself and the family for the IFSP meeting?

The IFSP Part 3: Facilitating the IFSP Meeting

Workbook Tasks, Continued

Step Four: Present Abilities, Strengths and Needs-Independent Activity

Review 2-3 IFSPs in your agency (children on your caseload and/or others that perhaps you've done some shadowing for). Look at the PASN section of the IFSP and see if the information describes the child's skills based on how they are able to participate in their daily routines and activities or if the information seems more like listing specific skills that might be found on a test, such as stacking blocks. Then compare that information to how the child is described in the Our Family Life section of the IFSP. Note any descriptions from the Our Family Life section that you feel might help create a clearer picture of the child's skills on the Present Abilities, Strengths and Needs page.

IFSP #1	IFSP #2	IFSP #3
Descriptions on PASN Page:	Descriptions on PASN Page:	Descriptions on PASN Page:
Info from Our Family Life that might assist (if any):	Info from Our Family Life that might assist (if any):	Info from Our Family Life that might assist (if any):

Step Five: Outcomes and Strategies-Field Observation

Observe another FSC conducting an IFSP meeting. Pay close attention to how they move the conversation from concerns and present abilities into the discussion on outcomes. What do you notice that you would like to incorporate into your own practice? What might you like to do differently? Jot these thoughts down here:

Step Seven: Deciding When, Where, How-Supervisor/Mentor Interview AND Independent Activity

With your agency supervisor/mentor, discuss the process for determining Supports and Services and deciding on the Lead Interventionist at the IFSP meeting. Jot down some notes for yourself on how you might complete this process in a manner that aligns with a Transdisciplinary Team Approach and supports the team decisions and the family's needs.

Review 2-3 IFSPs in your agency (children on your caseload and/or others that perhaps you've done some shadowing for). Look at the Supports and Services page and note the services listed there. Then review the IFSP outcomes and look to see how each service is included in the strategies for the outcomes. If any questions arise, discuss them with your supervisor/mentor.

Interactive Training

During interactive training, participants will:

- Learn about the first step in the Family's Journey through Early Intervention: Referral
  - What to look for in a referral that will guide the intake process (child's age, referral source, reason for referral, etc.)
  - Protocols for processing referrals are different from agency to agency
- Review the intake process
  - How to make families feel comfortable
  - Introducing FGRBI, TTA, and Ongoing and Authentic Assessment during the intake process
    - Review the Family Handbook to identify sections that can be used to support the discussion of the Adopted Best Practices
  - Best practices for the family interview, including:
    - Focusing on gathering functional information about the child's participation in daily routines
    - How to collect information that will support the development of the IFSP
      - ✓ Can you envision what the routine looks like?
      - ✓ Do you understand what is working or what is challenging about the routine?
  - Review examples of high-quality family interview information (e.g.- Sam doesn't like bath time vs. Mom and Dad both bathe Sam. One person holds him up and the other washes him because it's hard for him to maintain balance. This is frustrating for Sam.)
    - Practice recording high-quality information about routines by conducting a photo case study
  - Discuss strategies for preparing for an intake visit and "takeaways" from observing an intake visit
  - Hear a parent perspective on the intake process
- Review the CME and Eligibility process
  - Identify strategies for preparing families for the CME
  - Review eligibility categories
  - Identify strategies to support families as they learn about their child's eligibility
  - Hear a parent perspective on the CME and Eligibility process

Interactive Training

Continued:

- Expand upon the online training by exploring some of the components of the initial IFSP meeting
  - Review the FSC's role as facilitator
  - Identify strategies to ensure the family takes a lead role in the IFSP meeting
  - Reflect on ways to make the IFSP meeting process-based and not paper-based by considering the following quote: "The Individualized Plan – the written product itself is possibly the least important aspect of the entire plan process. Far more important are the interaction, collaboration, and partnerships between families/individuals and professionals that are necessary to develop and implement the individualized plan." *(Family Enablement Project Field-Based Training, Morganton, NC -1990, Adapted)*
  - Review examples of high-quality PASNs that are focused on functional participation (e.g.- Sam has strong language skills vs. Sam uses 1-2 word phrases to request what he wants at meals and playtime)
  - Review examples of high-quality IFSP outcomes that are based on the child's needs and focused on increasing functional participation in natural environments and routines (e.g.- Sam will have more trunk control vs. Sam will be able to sit in a "big kid" booster seat at the dinner table)
  - Hear a parent perspective on the initial IFSP process

Homework and Supplemental Resources

Homework

- Review Gianna's IFSP from the IFSP TA document and, using what you learned in the interactive session, answer the following questions on your homework handout
  - Does the PASN reflect functional skills?
  - Is the outcome functional and routines-based?
  - Are the strategies reflective of FGRBI? If yes, please list one strategy that you feel fits.
  - Describe how TTA is visible in the service assignments.

NOTE: The Gianna IFSP is the example used in the online IFSP training. Participants may wish to complete the homework while taking the online IFSP modules.

Supplemental Resources

- IFSP TA Document
- Evaluation and Assessment TA Document

SEGMENT 3: ONGOING SERVICE COORDINATION

Segment Tasks

1. Required: Intro to FSC Segment 3 Online Training (1 Hour)
2. Workbook Tasks
3. Required: Watch recorded presentations from State Schools and Community Partners
4. Optional: Foundations of Relationship-Based EI Online Training (3 Hours)
5. Interactive Training
6. Homework

Note: Participants should complete the required online training before completing optional online training. The optional training is highly recommended as it will expand upon the components covered in this segment of training.

Segment Components

1. Coordination of Ongoing Service Part 1

   Overview of the requirements of monthly contacts, how to conduct high-quality monthly contacts, and how to support families based on information collected during monthly contacts.

2. Coordination of Ongoing Services Part 2: 6-Month Review and Annual IFSPs

   The "why" of 6 month reviews and annual IFSPs as well as an overview of the requirements.

3. Documentation and Billing

   High-level overview of requirements for service coordination documentation and billing

Note: The interactive training for this segment will also include a Q&A with state-supported schools and community partners about their programs and referral procedures. Participants should watch the recorded presentations before attending to prepare.

Segment 3: Ongoing Service Coordination

Coordination of Ongoing Services Part 1

Online Training Overview

- The FSC has the responsibility to monitor the IFSP on an ongoing basis through monthly contacts, regular communication with providers and periodic IFSP reviews
- The FSC should be sure that services are being delivered according to the 8 Key Principles and New Mexico's 3 Adopted Best Practices
    - Activity: Looks Like/Doesn't Look Like a Key Principle
        - Sending the message that the more service providers involved, the more gains a child will make (DOESN'T look like a Key Principle)
        - Making time for team members to communicate (LOOKS like a Key Principle)
        - Having separate providers see the family at separate times to address separate skills (DOESN'T look like a Key Principle)
    - Parent perspective on how TTA made family life and the delivery of services easier and more accessible
- FSCs must communicate with families monthly. To ensure successful monthly contacts, FSCs should
    - Let families know to expect a monthly contact and the purpose of the contact
    - Find out the best method and time for contacting them
    - Let families know that they can contact their FSC at anytime
- Before monthly contacts, FSCs should prepare themselves by reviewing the IFSP, reviewing contact notes, reviewing recent conversations with the family and providers
- During the monthly contacts, FSCs should check in on the child's current strengths and needs, any changes to the family's circumstances, how services are working for the family
- To gather the best information possible, FSCs need to ask questions that are
    - Open-ended- "What has been happening with Sam since we last spoke?" versus "Is everything going okay?"
    - Specific and Detailed- "What has been going well in the past month? What has been challenging?" versus "How is everything going?"
    - Non-leading and non-judgmental- "How are you feeling about your services right now?" versus "Is everything going well with services?"

Segment 3: Ongoing Service Coordination

Coordination of Ongoing Services Part 1

Online Training Overview, Continued

- After monthly contacts, FSCs will need to complete follow-up actions based on the type of information they receive. These actions could include
    - Share information with the IFSP team such as new caregiver concerns
    - Gather more information from the IFSP team such as the schedule of visits if a parent is feeling overwhelmed with services
    - Provide caregiver education or support such as information on how caregiver coaching is the most effective method of EI delivery
    - Refer the family to outside resources such as WIC or Home Visiting if additional assistance is needed
    - Request that the team review or update the IFSP such as if the child is now demonstrating a new concern
- To build parent competence and confidence, FSCs should do WITH and not FOR families
- Documentation of monthly contacts should be put in the child's file and include the method of communication, what was discussed and the next steps to be taken.
- In addition to speaking to families monthly, FSCs also need to ensure the IFSP team is communicating regularly and providing consistent messages to the family
    - Help practitioners find ways to collaborate through consultation or co-visits
    - Ensure the lines of communication are open and that practitioners inform the team when the family has shared information with them
    - Facilitate productive TTCMs where all members contribute
    - Ensure that all team members are delivering services in support of the 8 Key Principles and Adopted Best Practices
- In some cases, an FSC may need to communicate individually with one provider if the family has a complaint or services are not being delivered appropriately

Workbook Tasks

Conversation Starters-Field Observation

Just as you were asked to consider for the process of developing IFSP outcomes and strategies, see if you can observe another FSC beginning the conversation for a monthly contact. Pay close attention to the types of questions that they ask to connect with the family and as they relate to the monitoring of services. What do you notice that you would like to incorporate into your own practice? What are other questions that you might like to ask?

Segment 3: Ongoing Service Coordination

Coordination of Ongoing Services Part 2: 6 Month Review and Annual IFSPs

Online Training Overview

- The purpose of IFSP reviews is to
  - Measure progress toward Outcomes
  - Determine if the current outcomes, services, and supports have been effective in helping the family achieve their goals
  - Make necessary modifications to the outcomes, services, and supports to ensure that the child is making appropriate progress
- The IFSP must be reviewed at 6 months but the family can request a review earlier if needed. Ideally, all team members will participate but, at a minimum, the meeting must include the FSC and the family.
- An annual IFSP meeting and re-determination of eligibility must occur after one year, A new IFSP will be written. The requirements for participants at an Annual IFSP are the same as at the initial IFSP.
- IFSP reviews cannot be held without the consent of the family
- Family service coordinators should prepare for IFSP reviews by
  - Determining with the IFSP team, including the family, who should attend the meeting, scheduling the time and place, and sending out invitation
  - Ensuring that the team has a TTCM to review the child's current strengths and needs, the family's priorities, and the effectiveness of the current IFSP
  - Preparing the family for the meeting by
    - Reviewing current assessment or evaluation data
    - Reviewing Parental Rights and Safeguards
    - Providing Prior Written Notice
    - Utilizing the FIT Family Handbook to review the IFSP form, the "Things to Consider as you Prepare to Develop Your Family's IFSP" section, and the "Places We Go-Things We Do" section.
- During the review the FSC will facilitate the meeting, support families to be active participants and decision-makers, and complete the IFSP appropriately

Workbook Tasks

Scavenger Hunt!- *Supervisor/Mentor Interview*

Locate and review your agency's policies and procedures for scheduling and conducting a Transdisciplinary Team Consultation Meeting (TTCM). Locate and review any forms associated with the process. Jot down notes and questions below and discuss these with your supervisor or mentor.

Documentation and Billing

Online Training Overview

- Thorough documentation is important for supporting your billing, transferring records, audits, keeping a record of activities, if the record is subpoenaed
- Documentation must include the child's name, the date of the contact, a brief but detailed description of the activity, time in and out, your first and last name and signature, your credentials (FSC)
- Sources of funding for FIT services include Medicaid and State General Funds, ECECD General Funds, Medically Fragile Waiver, Private Insurance for up to $3,500
  - Families fill out the Public Private Insurance form to indicate what kind of insurance they have; Medicaid is considered public insurance
- Family Service Coordination is billed as a "unit"
  - The unit is one month
  - The monthly unit rate is based upon an average amount of time spent per family per month to allow for flexibility in meeting families' changing needs
  - Service coordination unit may be billed anytime an FSC provides the minimum amount of service- which is at least one hour of service coordination to a specific family during the month
- Activities that are billable include
  - Direct work with families such as discussing concerns, explaining rights, reviewing evaluation information etc.
  - Work on behalf of families such as writing up the IFSP, coordination with different providers, etc. NOTE: the activity must be for a *specific family* not a group of families.
- Non-billable activities include reviewing the file to make sure all documents are present, correcting typos, making corrections to data entries

Workbook Tasks

Scavenger Hunt!- *Independent Activity*

Review 2-3 files in your agency. Review several of the Family Service Coordination log/contact notes. Look for the required components and note any questions about your agency's process here.

Billing Process- Supervisor/Mentor Interview

Discuss the specifics of how the billing process works in your agency and which aspects are your responsibility. Use this space to take notes from your discussion with your supervisor/mentor and be sure to review any forms that the agency uses for this process.

Documentation and Billing

Participant Resources

Family Service Coordination: Billable and Non-Billable Activities

Here are just a few examples of family service coordination activities that are billable - because they are completed on behalf of the child and family to support them in moving forward with their outcomes. We have also included some examples of non-billable activities that a family service coordinator may need to do but that are for the purposes of maintaining the integrity of the child's file and are not related to support in moving forward with the outcomes. Many of these activities can be considered "Record-Keeping Activities".

FSC Activities Completed on Behalf of the Family - Billable	FSC Record-Keeping Activities – Non-Billable
Any contact with the family, including visits confirmed or canceled, Ex: Family calls to reschedule an IFSP meeting	**Reviewing the file to ensure that all documents are present in the file, Ex:** FSC reviews the file using a file audit tool
Any contact with team members should be documented if it is an action on behalf of the family, Ex: FSC calls a service provider to confirm that orthotics have been ordered for a child	**Making corrections to minor typos in documentation, Ex:** Misspelled the name of the service provider
Any contact with additional resources to support the family, Ex: FSC completes an ECEP referral packet	**Making corrections to data entries, Ex:** Correcting the Delay Reason for a given activity in the database

Please note, these are just examples to prompt your thinking; it is NOT a comprehensive list!

REMINDER!

A child's file is a legal document! Any changes to the content of documents in the file (ex: CME report, IFSP, etc.) require a Prior Written Notice (PWN) and discussion with the family of why the change is being made.

Segment 3: Ongoing Service Coordination

Interactive Training

During interactive training, participants will:

- Have a Q&A session with State Supported Schools and other community partners
- Review the homework from the Segment 2 Interactive Session
- Learn about the objectives of monthly contacts, including:
    - Supporting families and providers to ensure that services are being delivered in alignment with New Mexico's three adopted best practices (FGRBI, TTA, Ongoing and Authentic Assessment)
        - Hear a high-level overview of the SSOOPPRR framework
        - Define what it means for assessment to be "ongoing" and "authentic" (i.e. data is gathered at each visit through parent report and provider observation about the child's functioning within the context of daily routines)
        - Identify the components of TTA
            - Group Understanding- Team members commit to teach, learn, and work across disciplinary boundaries to plan and provide integrated services
            - Communication- The team meets regularly to share information and to teach and learn across disciplines (TTCMs)
            - IFSP Development- IFSP team (including family) develop the IFSP together based on functional assessments
            - IFSP Implementation- One person works most often with the family (lead provider); other members provide support through consultation/co-visits
        - Identify the purpose and components of a TTCM
            - Discussion is informed by provider observations, information from the family, and ongoing assessment
            - Teams discuss the child's current strengths and needs and progress towards outcomes, planning for strategies and intervention, and evaluate the current supports and services for effectiveness
- Discuss how to effectively share information with practitioners, especially regarding family complaints
    - Consider the family and provider perspective
    - Consider patterns vs. isolated incidents
    - Communicate with sensitivity
    - Utilize your resources
    - Talk to your mentor or supervisor
- Review the requirements for 6 Month Reviews and Annual IFSPs
    - Required by law
    - Update PASN, outcomes, services and frequency, as necessary
    - Changes can happen between reviews if needed
    - Annual redetermination of eligibility is required
    - Don't forget a PWN
- Discuss how to balance the family's expertise on their child and routines and the professionals' expertise on child development and effective EI service delivery

Homework and Supplemental Resources

Homework

- Participants will be asked to watch a specific video highlighting FGRBI and to complete a reflection activity

Supplemental Resources

- None

SEGMENT 4: EARLY CHILDHOOD TRANSITION

Segment Tasks

1. Intro to FSC Segment 4 Online Training (2 Hours)
2. Workbook Tasks
3. Optional: TAS Webinar (Transition Initiative Website)
4. Interactive Training
5. Homework (Review with Supervisor after Completion)
6. After Training Completion: New Mexico ECO System Online Training (2 Hours)

Note: Participants should complete the required online training before completing optional online training. The optional training is highly recommended as it will expand upon the components covered in this segment of training. Supervisors should plan to support participants with a review of the homework from this segment of the training as well as the completion of the New Mexico ECO System Online Training

Segment Components

1. Introduction to Transition

   Overview of the early childhood transition process including an introduction to Community Based Transition Teams.

2. Transition Planning

   The logistics of transition notification and an introduction to the types of transition options available to families.

3. Transition Plan

   Overview of Parts 1 and 2 of the Transition Plan and their required components.

4. Pre-Planning for Transition

   How to plan and prepare for the Transition Conference.

5. The Transition Conference

   Purpose and requirements of the Transition Conference.

6. Final Steps: Initial Comprehensive Evaluation for Part B Through Follow-Up

   Overview of the steps taken during the Part B eligibility determination and IEP processes.

Additional Information or Guiding Resources

This training segment utilizes the Timeline of Steps for Early Childhood Transition in New Mexico (also known as the “transition flowchart”) as a guiding document for the content of this segment. FSCs are directed to download the manual New Mexico Guidance: Children Transitioning from IDEA Part C to Part B to find a copy.

Segment 4: Early Childhood Transition

Introduction to Transition

Online Training Overview

Introduction to transition in New Mexico:

- Transition is regulated by IDEA, OSEP, APR indicators, and NM statutes and rules
- Early Intervention services end at three years of age
- FSCs should discuss transition at a child's entry into the FIT program and continue to have conversations throughout their time with FIT
- The New Mexico Transition Initiative provides a website with resources, training, and other guidance about transition
- Each community has an Early Childhood Transition Team that is meant to build community, respond to community needs, increase communication between all agencies involved in transition, create seamless transitions between Part C and Part B services, and create community MOUs
  - Agencies may be involved in more than one transition team and have more than one MOU
  - The MOU defines how the agency will implement transition regulations within the communities that they serve
- Service coordinators should know and understand the community partners in the areas they serve including daycares, head start, home visiting, etc.
- FSCs should download and become familiar with the manual New Mexico Guidance: Children Transitioning from IDEA Part C to Part B
- The Timeline of Steps for Early Childhood Transition also called the "transition flowchart" should be utilized to ensure smooth and timely transitions
- Children may or may not be eligible for Part B services

- Parent perspective on transition

Workbook Tasks

Scavenger Hunt!- *Supervisor/Mentor Interview AND Independent Activity*

Go to the New Mexico Early Childhood Transition Initiative website using the link in your Helpful Links handout and locate each of the Community-Based Transition Teams for your EI agency's service area(s) and answer the following questions:

- What is the name(s) of your transition team or teams?
- Who attends these transition team meetings from your EI agency?

Transition Planning

Online Training Overview

- Guidelines and purpose for transition notification
    - LEA is notified of all "potentially eligible" children (those with established condition or developmental delay) who will be turning three in the next 12 months.
    - Notification assists LEA to plan for upcoming transitions, including EDTs and IEPs
    - Notification list sent at least quarterly but local MOUs provide additional guidance
- Family Service Coordinators must work with families to help them understand what to expect during each step of the transition process
- Conversations about transition begin at the very first IFSP meeting
- ALL children transition out of FIT services but where they transition to can vary and includes:
    - Part B services from the LEA
    - Community programs such as private preschool, NM PreK, child care, Head Start, Home Visiting, or another early childhood program in the community
    - State supported schools such as NMSD or NMSBVI
    - Staying at home with caregivers
- Family service coordinators must understand the various transition options available and help families make an informed decision

Workbook Tasks

Transition Notification Process-Supervisor/Mentor Interview

Find out what the specific process for transition notification is in your agency. Work with your supervisor or mentor to locate a copy of the Transition MOU and determine the following:

- Who in your agency is responsible for notifying the LEA of potentially eligible children?
- How are they notified (e.g. e-mail, Fax, in person, etc.)?
- How often is this notification sent to the LEAs?
- Which LEAs receive notification?

Segment 4: Early Childhood Transition

Transition Plan

Online Training Overview

- Parents have many choices in the transition process and have the right to determine their level of participation in the process, decide who they want to participate in transition meetings and decide what information is shared with other agencies.
- The planning process **must start early** to ensure a smooth transition
- Family service coordinators must work to support families to understand the process and make informed decisions
- Part 1 of the Transition Plan
  - Completed at the initial IFSP
  - FSC should calculate the required dates of completion for each step of transition and review them with the family at the meeting
  - Initial conversations about family priorities and preferences begin and are documented in the notes section
- Part 2 of the Transition Plan
  - Begins before the child is 24 months and occurs over many months
  - Allows for individualizing the specifics of the child's transition and plan for the steps that need to occur before the Transition Conference
  - Calculate and record projected dates for each step
  - Record the date completed as each step is done and record the details of the conversations and actions taken in the notes section of each part of the plan
- Parent perspective on the importance of transition planning
- Introduction to the Notice of Child & Family Rights and Safeguards
- Completion of the Transition Referral
  - FSC will help parents understand the benefits of Part B services
  - With parent permission, the FSC will submit a transition referral to LEA
- How to handle late referrals
  - Less than 45 days before third birthday- refer directly to LEA
  - 45-90 Days before third birthday- refer to LEA ASAP and follow required steps for transition
- Introduction to the Supporting Transition to Preschool for Young Children with Disabilities parent brochure

Transition Plan

Workbook Tasks

Notice of Child and Family Rights and Safeguards in New Mexico-Independent Activity AND Supervisor/Mentor Interview

Please download the Notice of Child and Family Rights from the Resources Tab in the training. Read the document and note any questions here. In addition, please answer this question: How might you use this document to explain to parents the child and family rights and safeguards specific to transition? Be sure to discuss this with your supervisor/mentor.

Identifying Transition Options in Your Community-Independent Activity AND Supervisor/Mentor Interview

Please download the *Supporting Transitions to Preschool for Young Children with Disabilities* brochure, located on the resource tab of this module. Discuss with your supervisor or mentor and identify the following:

- How might you use this brochure to support families in understanding the difference between Part C and Part B services?
- Which school districts (Part B) are available as transition options in your community?
- What transition options are available in your community for families besides the local school district Part B services? Other options could include Head Start, Home Visiting, Child Care, preschool programs, or other early childhood programs List these below and include any known specific program requirements such as income guidelines, age restrictions, etc

Pre-Planning for Transition

Online Training Overview

- Pre-planning for the transition conference must **start early** to ensure a timely transition
- Transition conference must occur between 9 months and 90 days before the child's third birthday
- The first step in pre-planning for the transition conference is sending the invitation(s)
    - FSC should discuss with the family which community partners, family members, or state-supported schools should attend besides the LEA and EI agency
    - With parental consent and signed PWN, invitations must be sent to the LEA at least 30 days before the conference
- Service Coordinator ensures completion of the TAS form
    - IFSP team will obtain current (within 6 months of the transition conference) developmental information to complete the TAS form and reviews with family
    - TAS form is sent to the LEA at least 30 days before the transition conference
    - TAS webinar on the ECLN Transition Initiative Website provides information on how to complete the TAS form
- Family Service Coordinator role in the transition conference includes developing an agenda, facilitating the meeting, ensuring that all participants have access to relevant information and data, and ensuring the family has a voice throughout the meeting
- For children not potentially eligible for Part B services, FSC will convene a transition conference to discuss other community options such as Head Start, PreK, Home Visiting, etc.
    - All components of the transition planning process still occur for children not transitioning to Part B services but a TAS form is not necessary
- Summer birthdays require additional planning that **starts early**

Workbook Tasks

Transition Assessment Summary Form Process- Supervisor/Mentor Interview

Find out what the specific process for submitting transition assessment summary forms is at your agency. Talk with your supervisor or mentor to find out the answers to the following questions:

- What is your agency process for ensuring that assessment information is updated and as current as possible to complete the TAS form in a timely manner to ensure that it can be sent to the LEA at least 30 days before the transition conference?
- What is the process for reviewing the TAS form with the family and submitting it to the LEA at least 30 days before the transition conference?

Pre-Planning for Transition

Participant Resources

SAMPLE Transition Conference Agenda

Purpose: To ensure coordination of all transition matters so there are no gaps in services for the child. Also, to allow all programs, that the parent has identified as an option for placement at 3 years of age, to share information about their eligibility requirements, procedural safeguards, program options, and the process for determining eligibility.

1. Introductions:
    - Attendees and their roles.
    - Child status in early intervention:
        1. How long child has been in the program
        2. What services they are receiving
        3. Who was invited but couldn't attend
        4. Transition plan
2. Parent priorities/concerns:
    - Allow parents to talk about the child's strengths
    - Discuss areas of concern
3. Programs:
    - Explain their program and how it can help the child excel and assist in the areas that are concerning to the parents
    - Discuss classroom and/or service delivery options
    - Rights and Safe Guards
4. Evaluation/Assessment:
    - Are there updates needed or additional testing?
    - Obtain permission for evaluation and/or complete applications
5. Next Steps:
    - Site Visits
    - EDT
    - IEP
    - Remind of exit date
6. Questions:
    - Parents
    - Programs

Segment 4: Early Childhood Transition

The Transition Conference

Online Training Overview

- Transition conference is the first opportunity for families to meet and begin a relationship with partners who may be supporting their child after transition.
- Transition conference must include
  - Review of preschool or other service options available to the child
  - Finalization of the transition plan
  - Review (and transmittal-with parent permission) of the IFSP, evaluation and other assessments
  - An explanation by the LEA of Part B procedural safeguards and eligibility determination process, including consent to evaluate
  - A discussion of other considerations such as the child's language, dietary, or medical needs, transportation, childcare needs, etc.
- The service coordinator must
  - Ensure that all current evaluations (completed within the last 6 months) have been given to LEA with parental consent
  - Ensure that Part 3 of the Transition Plan is complete
  - Ensure that efforts to complete the Action Steps on the plan are in progress
  - Ensure that decisions made at the conference are documented, signatures are secured and copies of the documents are sent to conference participants
- Before signing LEA consent to evaluate, parents must receive a PWN that includes
  - Description of actions proposed by LEA
  - Description of each assessment or evaluation proposed
  - A statement regarding Part B Safeguards and a copy of the safeguards
- Parents may refuse to move forward with Part B initial eligibility process but they should be fully informed that they will not receive services under Part B if they do
- If LEA does not respond to timely attempts to schedule the conference, the conference will still be held within timeline and FSC will review information about Part B services. A follow up conference will be scheduled with the LEA
  - FSCs must be familiar with Part B timelines and processes

Workbook Tasks

None

Segment 4: Early Childhood Transition

Final Steps-Initial Comprehensive Evaluation for IDEA Part B Through Follow-Up

Online Training Overview

- Families may be anxious and FSCs need to be familiar with the Part B process in order to support them in understanding the steps
- Part B evaluation determines if the child has a disability recognized under IDEA Part B, their educational needs, and the need for special education and related services
    - Evaluation must occur within 60 days of signed parental consent
    - The eligibility determination team (EDT) is a group of qualified professionals who review existing evaluation data and determine the need for additional assessments
- Eligibility Determination Meeting will be held after evaluations are complete
    - Includes qualified professionals and parents
    - Evaluation data will be reviewed with parents at the meeting
    - Team will determine if child meet eligibility requirements for IDEA Part B services
    - With parental consent, a member of the child's IFSP team may attend
- If the child is eligible, an IEP meeting will occur within 30 days of the eligibility determination to develop the child's Individualized Education Program (IEP)
    - IEP needs to be developed and in place by child's third birthday
    - IEP Team can include parents, FSC, EI direct service providers, other partners (NMSD, NMSBVI, etc.), representative from LEA, special education teacher, regular education teacher
    - The team will review the child's strengths and needs, develop a written plan (IEP) of how the district will meet the child's needs, determine a location for services (children must be in the Least Restrictive Environment, including a preschool setting with typically developing peers)
    - FSC should prepare the family by explaining the purpose of the meeting, who will be attending, and what will be discussed
- Families may choose to receive follow-up Family Service Coordination and/or Collaborative Consultation services from the EI agency after the child transitions to ensure a smooth transition process

Workbook Tasks

None

Segment 4: Early Childhood Transition

Interactive Training

During the interactive training, participants will:

- Learn how to use the Transition Flowchart (Timeline of Steps for Early Childhood Transition in New Mexico) as a guide for transition steps
- Identify the LEAs that their agency works with and the number of MOUs that guide their agency's transition procedures
- Understand variations in the notification process from agency to agency
- Identify how the IFSP Transition Plan aligns with the steps outlined in the Transition Flowchart
- Understand that transition planning begins at the child's entry into early intervention and that the depth of the discussion will depend on the child's age
- Identify the information that is required for the Key Dates and Transition Plan Part 1 sections on the IFSP
- Understand the purpose and requirements of Part 2 of the Transition Plan:
    - Completed just before the second birthday
    - Support the family in understanding their options
    - Identifying some potential transition options
- Understand that ALL children receive transition planning regardless of whether or not they are being referred to the LEA
- Think about the need for advanced planning for children with summer birthdays who will be potentially transitioning to an LEA
- Identify the various transition options in their community including LEAs, PreK, Home Visiting, Head Start, etc.
- Review the transition section of the Family Handbook and how to use it as a support for families
- Hear parent perspectives on the transition planning process and how FSCs can support families during this step
- Brainstorm questions that could be asked of caregivers to help them identify their goals and priorities for their child and family to support the transition discussion
    - Practice the Transition Plan Part 2 steps using a case study to identify potential transition options that would support a hypothetical child and family based on their goals

Segment 4: Early Childhood Transition

Interactive Training

Continued:

- Identify how to use the Notice of Child and Family Rights and Safeguards to ensure family's know their rights
- Brainstorm some of the unique considerations that FSCs should think about as they help families plan for transition such as the need for childcare, transportation, medical concerns, feeding differences, etc.
    - Practice identifying the best potential transition options considering the unique needs of the case study family and child
- Review the components of the Transition Conference, including pre-planning
    - Understand that ALL children get a transition conference, regardless of whether they are potentially transitioning to the LEA or not
    - Identify the FSC's role and the LEA and/or community partner roles at the transition conference
    - Review the expectations for a Transition Conference that is not attended by the LEA
    - Identify how individual agencies ensure that the TAS form is up to date and is sent to the LEA at least 30 days before the transition conference
    - Review a sample Transition Conference agenda
    - Review what happened at the Transition Conference for a case study child
- Identify ways to support families in understanding the benefits of moving forward with the transition process and ensuring that they are fully informed of their rights throughout the transition process *(<u>NOTE:</u> Please allow FSCs to participate in the interactive session before reviewing any of the answers below with them!)*
    - Identify Myths and Facts about transition:
        - If the parent signs the Parent B Consent to Evaluate, they are agreeing to receive Part B services: MYTH
        - One benefit of receiving Part B services at 3 years old is to support the child to be more ready for Kindergarten: FACT
        - Having a transition conference with the LEA present means that I am agreeing to Part B services: MYTH
        - If the child is eligible for Part B services, the parent can still decline the IEP meeting: FACT

Segment 4: Early Childhood Transition

Interactive Training

Continued:

- If the parent goes to the IEP meeting, they still have the right to decline Part B services: FACT
- A child who is enrolled in Part B services cannot also be enrolled in another, non-special education, early childhood program: MYTH
- All children who qualify for Part B services will be placed in special education classrooms that are only for children with severe disabilities: MYTH
- A member(s) of the IFSP team are automatically invited to the IEP meeting: MYTH

- Review the steps the LEA must take for children transitioning to Part B services and identify the FSC's responsibility in helping families understand and prepare for each step
  - Review the *Supporting Transitions to Preschool for Young Children with Disabilities* brochure as a resource for helping families understand Part B services
  - Hear a parent's perspective on what the transition from Part C to Part B services was like for her child and family and how FSCs can support caregivers during the process
- Hear a high-level overview of what ECO is and learn about online training available to support further learning
- Identify the goals of follow-up services (FSC and Collaborative Consultation), including ensuring that the family:
  - Feels supported as they make adjustments vs abandoned by their FIT providers
  - Has ways to access necessary resources and supports
  - Knows who to contact if they have additional concerns about their child

Segment 4: Early Childhood Transition

Homework and Supplemental Resources

Homework

Transition Follow-up Activities

The following activities will support your learning about the transition process and prepare you to carry out your roles and responsibilities as a family service coordinator. Please work with your mentor or supervisor to develop a plan to support you completing in each activity.

Activity	Projected Date of Completion	Date Completed
Review examples of the Transition Plan Part 1 section of some completed IFSPs		
Observe an Initial IFSP meeting and notice how the FSC discusses Transition Plan Part 1. Debrief this with the FSC and/or your mentor and consider the following: - How did the FSC explain the transition process to the family? - Based on their interactions, how well do you think the family understood what the FSC shared? - Based on their interactions, how do you think the family feels about the transition process at this point in time?		
Review examples of the transition planning Part 2 section of some completed IFSPs		
Meet with an experienced FSC and discuss how they prepare for the transition planning discussion with a family		
Observe an FSC meeting with a family to begin Transition Plan Part 2 and notice how the FSC begins the conversation about transition planning. Debrief this with the FSC and/or your mentor and consider the following: - How did the FSC explain the transition process to the family? - How did the FSC introduce the various transition options available to the family? Did they use the parent brochure "*Supporting Transitions to Preschool for Young Children with Disabilities*"? - Based on their interactions, how well do you think the family understood what the FSC shared? - Based on their interactions, how do you think the family feels about the transition process at this point in time?		
Determine who your community partners are at the LEA and/or local Head Starts and Pre-K's. See if you can arrange a visit to each site to learn more about how classrooms operate		
Determine where blank transition forms or packets are located for your agency		
Review examples of completed Transition Referral Forms		
Observe an FSC discussing with the family making a referral to an LEA and asking for consent. Debrief this with the FSC and/or your mentor and consider the following: - How did the FSC explain the referral process to the family?		

Segment 4: Early Childhood Transition

Homework and Supplemental Resources

Homework, continued

Transition Follow-up Activities

- How did the FSC support the family in understanding the benefits of providing consent for referral - Based on their interactions, how well do you think the family understood what the FSC shared? Based on their interactions, how do you think the family feels about the transition process at this point in time?		
Review a completed invitation to the transition conference		
Review children's files to see examples of completed Transition Assessment Summary (TAS) forms		
Watch the TAS Form Webinar https://cdd.health.unm.edu/ecln/transition-initiative-webinars/		
Observe a Transdisciplinary Team Consult Meeting (TTCM) when a team is completing the TAS form. Be sure to debrief this meeting afterward with the FSC or your mentor		
Review a sample of a completed transition conference agenda for your agency		
Review completed IFSP transition conference pages		
Meet with an experienced FSC and discuss how they prepare the family for the transition conference. Pay special attention to how the FSC describes the following: - The purpose of the conference - The role of the family during the conference - Who will be attending the conference		
Observe at least one transition conference *(if possible, observe one for a child who is not transitioning to the LEA and one for a child who has been referred to the LEA).* Please pay special attention to the following: - Who facilitated the meeting? - How did the team ensure that the family was heard? - For a conference with the LEA, how did the LEA explain their program and the eligibility process?		
Meet with an experienced FSC and discuss how they prepare for the IEP meeting discussion with a family. Pay special attention to how the FSC describes the following: - The eligibility determination meeting and differences between Part C and Part B eligibility - The purpose of the IEP meeting - The role of the family during the IEP meeting - Who will be attending the IEP meeting		
For more information on the family perspective, connect with PRO and/or EPICs to discuss ways to support the family in the process and/or take some of their workshops (as appropriate).		

Segment 4: Early Childhood Transition

Homework and Supplemental Resources

Supplemental Resources (Included in the Online Training)

- New Mexico Guidance: Children Transitioning from IDEA Part C to Part B manual
    - The Timeline of Steps for Early Childhood Transition (also called the “transition flowchart”) is contained within the manual and should be utilized to ensure smooth and timely transitions
- Supporting Transitions to Preschool for Young Children with Disabilities brochure