**Coach/Coachee Planning Form and Checklist**

Facilitator/Coachee: Master Facilitator/Coach:

Meeting date:

Goal: (# of steps the coachee will do) **Score: Total # of Yesses/Total # of Yes/No’s = \_\_%**

**Step 1 Materials Checklist:**

**PTR Goal Setting Form**

**IBRST**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Facilitator Activity** | **Assignment** | **Yes** | **No** | **N/A** | **Notes** |
| **Goal Setting/Daily Progress Monitoring (Step 1)** | | | | | |
| 1. Opened the meeting with a positive comment. |  |  |  |  |  |
| 1. Described purpose of meeting and expected outcomes by end of meeting. |  |  |  |  |  |
| 1. Confirmed that team included all relevant team members (at secondary, consider inclusion of the student) |  |  |  |  |  |
| 1. If additional team members were needed, developed an action plan for who will contact the person and by what date (action plan can be verbal) |  |  |  |  |  |
| 1. Obtained input from each team member on behaviors to be decreased. |  |  |  |  |  |
| 1. Guided team to clearly define each behavior identified in observable and measurable terms. |  |  |  |  |  |
| 1. Reached consensus on primary problem behavior(s) to be targeted |  |  |  |  |  |
| 1. Obtained input from team on behaviors to be increased that would replace the problem behavior(s) identified as targets. |  |  |  |  |  |
| 1. Guided team to clearly define each behavior identified in observable and measurable terms. |  |  |  |  |  |
| 1. Reached consensus on primary replacement behavior(s) to be targeted |  |  |  |  |  |
| 1. Guided the team to develop the Individualized Behavior Rating Scale Tool (IBRST) (*see Guiding Questions for Developing the Behavior Rating Scale)* or an alternate daily progress monitoring tool that specifically measures the behaviors to be targeted. |  |  |  |  |  |
| 1. Provided a practice opportunity for the teacher and any other staff member (if applicable) to use the IBRST or other progress monitoring tool. |  |  |  |  |  |
| 1. Established a start date for using the IBRST or other progress monitoring tool. |  |  |  |  |  |
| 1. Scheduled a day/time to observe the student.. |  |  |  |  |  |
| 1. For **each** problem behavior identified, offered one or more of the following choices to complete the PTR Assessment.    * Complete at meeting—If you have time left to do the PTR Assessment (FBA), decide if (a) time will be given during the meeting for each team member to individually complete a PTR assessment on each of the problem behavior(s) targeted.    * If the team consists of one teacher, conduct as an interview    * Homework—If time is running out, decide if each team member who knows the child and the performance of the behavior well to complete a PTR Assessment or other FBA form prior to next meeting. Or, if the team does not choose to do the PTR Assessment as homework, decide how they will do it at the next meeting (see bullet above—complete at meeting). |  |  |  |  |  |
| 1. Asked the team for feasible deadlines if PTR assessment is being done as homework. |  |  |  |  |  |
| 1. Scheduled day/time for next meeting/session and confirmed with team that master facilitator would be sending out confirmation email. |  |  |  |  |  |
| 1. Summarized the outcomes of the meeting and activities to complete. |  |  |  |  |  |
| 1. Ensured that no team member was assigned too many activities. |  |  |  |  |  |
| 1. Offered to assist teacher/team to do specific activities. |  |  |  |  |  |
| 1. Thanked team for their time and input. |  |  |  |  |  |
| **Total Adherence Fidelity Score (# of Yesses/# of Yesses + No’s)** | | | |  | |

Quality Scores: 0 = Seldom (<25% of step); 1 = Sometimes (25-50%); 2 = Often (51-75%); 3 = Always (>75%)

|  |  |  |
| --- | --- | --- |
| **Quality Component** | **Quality Score** | **Comments** |
| 1. **Rapport & Responsiveness**   *Conducted meeting in a warm, non-judgmental manner (using warm or neutral tone and affect); acknowledged team members’ attempts and ideas, endorsed suggestions; encouraged input and comments (asked frequent questions, delivered specific praise); empathized by using empathy statements and acknowledging difficult situations.* | 0 1 2 3 |  |
| 1. **Communication**   *Used active listening (avoided interrupting prior to asking questions); summarized to confirm understanding, clarified input, welcomed all input; used appropriate non-verbal behaviors (eye-contact, nodding, inviting posture)* |  |  |
| 1. **Pacing**   *Maintained a reasonable pace while facilitating meeting (used effective redirection and time check-ins), adjusted the pace based on team context and needs.* |  |  |
| 1. **Flexibility**   *Tailored and individualized the implementation of the PTR process to match the context of the team, student, and situation while balancing the integrity of the process.* |  |  |
| **Total Quality Fidelity Score = Points earned/12** | | **%** |

**Coach/Coachee Planning Form and Checklist**

Facilitator/Coachee: Master Facilitator/Coach:

Meeting date:

Goal: (# of steps the coachee will do) **Score: Total # of Yesses/Total # of Yes/No’s = \_\_%**

**Step 2 Materials Checklist:**

**PTR Assessment Checklists (completed by team members)**

**PTR Assessment Summary Table**

**IBRST data collected since previous meeting**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Facilitator Behavior/Action** | | **Assignment** | **Yes** | **No** | **N/A** | **Notes** |
|  | **Functional Behavior Assessment (Step 2)** | | | | | |
| 1. Opened the meeting with a positive comment and thanked team for completing assignments. | |  |  |  |  |  |
| 1. Described purpose of meeting and expected outcomes by end of meeting. | |  |  |  |  |  |
| 1. Asked team/teacher to review IBRST or alternate daily progress monitoring tool to determine if the tool was functional for the teacher. | |  |  |  |  |  |
| 1. If the data tool is not functional, facilitated a discussion on refining/editing the tool. | |  |  |  |  |  |
| 1. If PTR Assessment was done as homework, provided team members with a visual (hard copy or LCD) of the Assessment Organizational Summary Table or Competing Behavior Pathway and the draft hypothesis(es) | |  |  |  |  |  |
| 1. If PTR Assessment was not done as homework, either gave each team member ~ 15 minutes to complete it in the meeting and completed the Assessment Organization Summary Table during the meeting (if time permits). | |  |  |  |  |  |
| 1. Reviewed information on Summary Table and asked questions to get clarification on antecedents, functions, consequences. | |  |  |  |  |  |
| 1. Added, removed, or adapted information on Summary Table as needed after clarifications. | |  |  |  |  |  |
| 1. Gained team consensus on hypothesis(es). | |  |  |  |  |  |
| 1. If consensus not obtained, guided the team to determine next steps:  * Additional information needed? If yes, schedule classroom observation * Additional measures needed? If yes, determine measures and provide * Scheduled brief follow-up meeting to review additional information and/or measures (if applicable) | |  |  |  |  |  |
| 1. Asked the team for feasible deadlines if PTR Intervention menu is being done as homework. | |  |  |  |  |  |
| 1. Scheduled day/time for next meeting/session and confirmed with team that master facilitator would be sending out confirmation email. | |  |  |  |  |  |
| 1. Summarized the outcomes of the meeting activities to be completed for next meeting (e.g., complete PTR Intervention Menu) and provided examples and clear explanation on how to complete the activity. | |  |  |  |  |  |
| 1. Ensured that no team member was assigned too many activities. | |  |  |  |  |  |
| 1. Offered to assist teacher/team to do specific activities. | |  |  |  |  |  |
| 1. Thanked team for their time and input. | |  |  |  |  |  |
| Total Fidelity Score (# of Yesses/# of Yesses + No’s) | | | | |  | |

Quality Scores: 0 = Seldom (<25% of step); 1 = Sometimes (25-50%); 2 = Often (51-75%); 3 = Always (>75%)

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| --- | --- | --- |
| **Quality Component** | **Quality Score** | **Comments** |
| 1. **Rapport & Responsiveness**   *Conducted meeting in a warm, non-judgmental manner (using warm or neutral tone and affect); acknowledged team members’ attempts and ideas, endorsed suggestions; encouraged input and comments (asked frequent questions, delivered specific praise); empathized by using empathy statements and acknowledging difficult situations.* | 0 1 2 3 |  |
| 1. **Communication**   *Used active listening (avoided interrupting prior to asking questions); summarized to confirm understanding, clarified input, welcomed all input; used appropriate non-verbal behaviors (eye-contact, nodding, inviting posture)* |  |  |
| 1. **Pacing**   *Maintained a reasonable pace while facilitating meeting (used effective redirection and time check-ins), adjusted the pace based on team context and needs.* |  |  |
| 1. **Flexibility**   *Tailored and individualized the implementation of the PTR process to match the context of the team, student, and situation while balancing the integrity of the process.* |  |  |
| **Total Quality Fidelity Score = Points earned/12** | | **%** |

**Coach/Coachee Planning Form and Checklist**

Facilitator: Master Facilitator:

Meeting date:

Goal: (# of steps the coachee will do) : **Score: Total # of Yesses/Total # of Yes/No’s = \_\_%**

**Step 3a Materials Checklist**

**PTR Intervention Menu**

**PTR Intervention Scoring Table (optional)**

**PTR Intervention Plan Template**

**PTR Intervention Appendices (optional)**

**IBRST data collected since previous meeting**

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| **Facilitator Behavior/Action** | | **Assignment** | **Yes** | **No** | **N/A** | **Notes** |
|  | **PTR Behavior Intervention Plan (Step 3a)** | | | | | |
| 1. Opened the meeting with a positive comment and thanked team for completing assignments. | |  |  |  |  |  |
| 1. Described purpose of meeting and expected outcomes by end of meeting. | |  |  |  |  |  |
| 1. Asked team/teacher to review IBRST or alternate daily progress monitoring tool to determine if the tool was functional for the teacher. | |  |  |  |  |  |
| 1. If the data tool is not functional, facilitated a discussion on refining/editing the tool. | |  |  |  |  |  |
| 1. If Intervention Menu was not provided as homework, gave each team member a PTR Intervention Checklist and intervention fact sheets or document describing interventions OR specific intervention fact sheets that may work well with the hypothesis. Asked them to rank order interventions (between 2-4 in Prevent; must teach replacement skill/behavior, must reinforce replacement behavior with functional equivalence) | |  |  |  |  |  |
| 1. Provided a visual of the PTR Intervention Scoring Table with results. | |  |  |  |  |  |
| 1. Reviewed intervention rankings, ensured match to hypothesis, and came to consensus on a minimum of one prevent, one way to teach replacement behavior, one reinforce (providing same function as hypothesis), and one strategy changing the way of responding to problem behavior. | |  |  |  |  |  |
| 1. Discussed the rankings and interventions selected by team members in each category (prevent-teach-reinforce) | |  |  |  |  |  |
| 1. Reached consensus on top ranked interventions from each category to be included in behavior intervention plan. | |  |  |  |  |  |
| 1. Ensured that the interventions selected from each category match the hypothesis information. | |  |  |  |  |  |
| 1. Ensured that the top ranked interventions selected were also selected by the teacher or the person responsible for implementing the intervention. | |  |  |  |  |  |
| 1. If top interventions were not the ones selected by the teacher:    1. Ensured that the teacher was willing to do the interventions selected by the team    2. If the teacher was not willing, asked the other team members if it is agreeable to go with the interventions selected by the teacher. | |  |  |  |  |  |
| 1. Developed each intervention selected by the team by:    1. Asking the team for a description of how they wish to use the intervention    2. If the team is unable to describe the intervention in the required detail, provided some examples of how the intervention might work and asked guiding questions to help determine the specific steps of the intervention    3. Wrote each step down (task analysis) so that the behavior intervention could be clearly understood and implemented by anyone working with the student. | |  |  |  |  |  |
| 1. Once the plan was completed, reviewed the steps of the interventions to make sure they are accurate and feasible. | |  |  |  |  |  |
| 1. Confirmed who on the team would be doing the interventions and the materials/resources that would be needed (if necessary).    1. If materials needed to be made, developed an action plan with the team to assign responsibilities. | |  |  |  |  |  |
| 1. Ensured that no team member was assigned too many activities | |  |  |  |  |  |
| 1. Scheduled a date and time to train the teacher) in the intervention plan. | |  |  |  |  |  |
| 1. Scheduled day/time for next meeting/session and confirmed with team that master facilitator would be sending out confirmation email. | |  |  |  |  |  |
| 1. Summarized the outcomes of the meeting activities to be completed for next meeting (e.g., complete PTR Intervention Menu) and provided examples and clear explanation on how to complete the activity. | |  |  |  |  |  |
| 1. Offered to assist teacher/team to do specific activities. | |  |  |  |  |  |
| 1. Thanked team for their time and input. | |  |  |  |  |  |
| **Total Fidelity Score (# of Yesses/# of Yesses + No’s)** | | | | |  | |

Quality Scores: 0 = Seldom (<25% of step); 1 = Sometimes (25-50%); 2 = Often (51-75%); 3 = Always (>75%)

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| **Quality Component** | **Quality Score** | **Comments** |
| 1. **Rapport & Responsiveness**   *Conducted meeting in a warm, non-judgmental manner (using warm or neutral tone and affect); acknowledged team members’ attempts and ideas, endorsed suggestions; encouraged input and comments (asked frequent questions, delivered specific praise); empathized by using empathy statements and acknowledging difficult situations.* | 0 1 2 3 |  |
| 1. **Communication**   *Used active listening (avoided interrupting prior to asking questions); summarized to confirm understanding, clarified input, welcomed all input; used appropriate non-verbal behaviors (eye-contact, nodding, inviting posture)* |  |  |
| 1. **Pacing**   *Maintained a reasonable pace while facilitating meeting (used effective redirection and time check-ins), adjusted the pace based on team context and needs.* |  |  |
| 1. **Flexibility**   *Tailored and individualized the implementation of the PTR process to match the context of the team, student, and situation while balancing the integrity of the process.* |  |  |
| **Total Quality Fidelity Score = Points earned/12** | | **%** |

**Coach/Coachee Planning Form and Checklist**

Facilitator: Master Facilitator:

Meeting date:

Goal: (# of steps the coachee will do) : **Score: Total # of Yesses/Total # of Yes/No’s = \_\_%**

**Step 3b Materials Checklist:**

**PTR Coaching/Fidelity Form**

**PTR Teacher Reflection Form (for performance feedback purposes after plan implementation)**

**IBRST data collected since previous meeting**

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| --- | --- | --- | --- | --- | --- | --- |
| **Facilitator Behavior/Action** | | **Assignment** | **Yes** | **No** | **N/A** | **Notes** |
|  | **PTR Coaching/Training the Plan (Step 3b)** | | | | | |
| 1. Thanked the teacher for providing the time to do the training. | |  |  |  |  |  |
| 1. Described purpose of coaching and expected outcomes by end of meeting. | |  |  |  |  |  |
| 1. Provided the teacher with the detailed plan (if not already provided to the teacher) and the coaching/fidelity checklist. | |  |  |  |  |  |
| 1. Asked the teacher to describe/explain each strategy intervention in his/her own words. | |  |  |  |  |  |
| 1. After teacher explained interventions, asked key question about the interventions to ensure teacher understood. | |  |  |  |  |  |
| 1. Offered to model the intervention (role-play) and asked the teacher to play the role of the student. | |  |  |  |  |  |
| 1. Asked the teacher to demonstrate the interventions through a role play. | |  |  |  |  |  |
| 1. Recorded on coaching/fidelity checklist whether teacher did or did not do step correctly. | |  |  |  |  |  |
| 1. Provided positive feedback on the steps that the teacher did accurately. | |  |  |  |  |  |
| 1. Guided a discussion about any steps that the teacher did not do correctly. | |  |  |  |  |  |
| 1. If applicable, asked the teacher to role play specific interventions again. | |  |  |  |  |  |
| 1. For any interventions that were not role-played accurately, gave the teacher several options:    1. Revise the strategy so that it would be easier to implement    2. Select a different strategy from the menu that was selected by the teacher and would match the hypothesis    3. Continue with current plan as is and schedule a date to retrain.    4. Continue with current plan as is and schedule a date for implementation. | |  |  |  |  |  |
| 1. If teacher reached acceptable criteria, scheduled first data of implementation with student. | |  |  |  |  |  |
| 1. Asked teacher preference on how student would be trained to do the plan.    1. Facilitator can train the student    2. Facilitator and teacher can co-train the teacher.    3. Teacher can train the student. | |  |  |  |  |  |
| 1. Offered to model implementing the intervention with the student for teacher to observe. | |  |  |  |  |  |
| 1. Asked the teacher his/her preference on fidelity measurements. The options are:    1. Self-assessment    2. External observation    3. Combination | |  |  |  |  |  |
| 1. Discussed with the teacher the frequency of fidelity measures and method of debriefing. | |  |  |  |  |  |
| 1. Thanked the teacher for his/her time. | |  |  |  |  |  |
| **Total Adherence Fidelity Score (# of Yesses/# of Yesses + No’s)** | | | | |  | |

Quality Scores: 0 = Seldom (<25% of step); 1 = Sometimes (25-50%); 2 = Often (51-75%); 3 = Always (>75%)

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| --- | --- | --- |
| Quality Component | Quality Score | Comments |
| 1. **Rapport & Responsiveness**   *Conducted meeting in a warm, non-judgmental manner (using warm or neutral tone and affect); acknowledged team members’ attempts and ideas, endorsed suggestions; encouraged input and comments (asked frequent questions, delivered specific praise); empathized by using empathy statements and acknowledging difficult situations.* | 0 1 2 3 |  |
| 1. **Communication**   *Used active listening (avoided interrupting prior to asking questions); summarized to confirm understanding, clarified input, welcomed all input; used appropriate non-verbal behaviors (eye-contact, nodding, inviting posture)* |  |  |
| 1. **Pacing**   *Maintained a reasonable pace while facilitating meeting (used effective redirection and time check-ins), adjusted the pace based on team context and needs.* |  |  |
| 1. **Flexibility**   *Tailored and individualized the implementation of the PTR process to match the context of the team, student, and situation while balancing the integrity of the process.* |  |  |
| **Total Quality Fidelity Score = Points earned/12** | | **%** |

**Coach/Coachee Planning Form and Checklist**

Facilitator/Coachee: Master Facilitator/Coach:

Meeting date:

Goal: (# of steps the coachee will do) **Score: Total # of Yesses/Total # of Yes/No’s = \_\_%**

**Step 4 Materials Checklist:**

**IBRST data collected since previous meeting**

**Fidelity measures**

|  |  |  |  |  |  |  |
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| **Facilitator Behavior/Action** | | **Assignment** | **Yes** | **No** | **N/A** | **Notes** |
|  | **PTR Progress Monitoring/Next Steps (Step 4)** | | | | | |
| 1. Opened the meeting with a positive comment and thanked team for completing assignments. | |  |  |  |  |  |
| 1. Described purpose of meeting and expected outcomes by end of meeting. | |  |  |  |  |  |
| 1. Guided the team to develop decision rules for:    1. Adequate fidelity    2. Adequate student behavior change | |  |  |  |  |  |
| 1. Guided the team to review fidelity data measures and provide input on the results. | |  |  |  |  |  |
| 1. Guided the team to review student outcome data. Provided summary/overview of baseline and post-intervention. | |  |  |  |  |  |
| 1. If fidelity was less than adequate and student outcome data showed no improvement, problem solved with the team and developed strategies to address fidelity. | |  |  |  |  |  |
| 1. Guided the team to determine next steps based on improved student outcome data.    1. Expanded/generalize the intervention (e.g., additional routines, classes, settings; additional people)    2. Faded parts of the intervention (e.g., schedule of reinforcement, amount of prompting, time delay, moving to student self-management, reduce number of steps)    3. Revised/shaped goals of intervention (e.g., IBRST measures for fantastic day can be raised) | |  |  |  |  |  |
| 1. Guided the team to determine next steps based on stable or worsening student outcome data.    1. Modified the intervention plan to make more intensive (greater frequency of reinforcement, greater dosage of intervention, additional prompting, etc.)    2. Reexamined the hypothesis and collect more FBA data to confirm.    3. Selected different interventions from menu that match hypothesis (scheduled a time to develop interventions and coach the teacher)    4. Expanded the team by bringing in expertise to do a functional analysis. | |  |  |  |  |  |
| 1. Scheduled a follow-up meeting to review data. | |  |  |  |  |  |
| 1. Summarized the results of the meeting and decisions that were made. | |  |  |  |  |  |
| 1. Guided the team to assign activities to team members. | |  |  |  |  |  |
| 1. Ensured that no team member was overwhelmed. | |  |  |  |  |  |
| 1. Thanked the team for their time. | |  |  |  |  |  |
| **Total Adherence Fidelity Score (# of Yesses/# of Yesses + No’s)** | | | | |  | |

Quality Scores: 0 = Seldom (<25% of step); 1 = Sometimes (25-50%); 2 = Often (51-75%); 3 = Always (>75%)

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| --- | --- | --- |
| **Quality Component** | **Quality Score** | **Comments** |
| 1. **Rapport & Responsiveness**   *Conducted meeting in a warm, non-judgmental manner (using warm or neutral tone and affect); acknowledged team members’ attempts and ideas, endorsed suggestions; encouraged input and comments (asked frequent questions, delivered specific praise); empathized by using empathy statements and acknowledging difficult situations.* | 0 1 2 3 |  |
| 1. **Communication**   *Used active listening (avoided interrupting prior to asking questions); summarized to confirm understanding, clarified input, welcomed all input; used appropriate non-verbal behaviors (eye-contact, nodding, inviting posture)* |  |  |
| 1. **Pacing**   *Maintained a reasonable pace while facilitating meeting (used effective redirection and time check-ins), adjusted the pace based on team context and needs.* |  |  |
| 1. **Flexibility**   *Tailored and individualized the implementation of the PTR process to match the context of the team, student, and situation while balancing the integrity of the process.* |  |  |
| **Total Quality Fidelity Score = Points earned/12** | | **%** |