

Routines-Based Assessment and Intervention Planning Checklist

Individualizing Inclusion in Child Care Project, 2001

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This checklist delineates each step of the routines-based assessment process from scheduling the interview to goal identification. It was designed to function as a step-by-step reminder of the routines-based assessment process for those just learning the process. It serves not only as a self-monitoring tool, but it can also be used by professionals to give feedback to their colleagues when implementing the routines-based assessment. The checklist is organized into the following main functions with steps outlined underneath each: scheduling, interview, and intervention planning.

DIRECTIONS: Use the checklist as a tool to check off steps that have been finished when completing the routines-based assessment process, or use it to provide feedback to another person who is responsible for completing the process. Depending on whether the checklist is used as a self-monitoring tool or as a tool to provide feedback to others, there are codes provided to indicate that the step was done or not done, or to indicate how well the step was completed by another person.

Routines-Based Assessment and Intervention Planning Checklist

Did the service coordinator	✓	✓/ -	-	Comments
Scheduling				
1. Determine when the routines-based interview is going to happen (i.e., before or at the intervention planning meeting).				
2. Determine who will interview the family on home routines (e.g., teacher, service coordinator, or specialist).				
3. Provide the interviewer with information or other support on the interview process, if needed.				
4. Determine who will be present at the interview.				
5. At least a day before the interview, prepare the family for the interview by telling them (a) that they will be asked to describe all their daily routines (the use of family preparation forms is optional), (b) then can choose the location, and (c) they can choose who participates (including whether it's one or both parents)				
6. Prepare the classroom teacher to talk about classroom routines.				
Interview				
7. At the interview, greet the family then tell them the purpose for the meeting (e.g., to get to know the family and to determine how best to provide support to their child and family).				
8. Ask the parents if they have any major questions or concerns before starting the interview.				
9. Ask the parents to describe their daily routines beginning with who in the home wakes up first.				
10. Listen carefully to what the parents is saying and make sure someone is taking notes.				

Did the service coordinator	✓	✓/ -	-	Comments
11. Ask the parents follow-up questions to learn about the child's engagement, independence, and social competence, and what other family members are doing in each routine (refer to the SAFER).				
12. At the end of each routine, ask the family what would make the routine better or if they are satisfied with the way things work.				
13. Put a star next to the notes where a family has indicated a desire for a change in routine or an outcome they would like for their child or family to be able to do.				
14. Avoid giving advice.				
15. After all of the routines have been discussed, review the concerns (starred) mentioned by the family.				
16. Ask the family if there is anything else that should be added to their list of concerns.				
17. Ask the teacher to describe each of the classroom routines from the time of the child's arrival through departure.				
18. Listen carefully to what the teacher is saying and make sure someone is taking notes.				
19. Ask the teacher follow-up questions to learn about the child's engagement, independence, and social competence, and what other children are doing in each routine.				
20. At the end of each routine, ask the teacher what, if anything, would make the child more successful in the routine?				
21. Put a star next to the notes where the teacher has indicated a desire for a change in routine or has said something that she would like the child to be able to do.				
22. Avoid giving advice.				
23. After all of the routines have been discussed, review the concerns (starred) mentioned by the teacher.				

Did the service coordinator	✓	✓/ -	-	Comments
24. Ask the teacher if there is anything else that should be added to the list of classroom concerns.				
Intervention Planning				
25. Review all home and classroom concerns (starred) with the parents.				
26. Ask the family to list the things they would like the team to work on. Prompt the family as necessary.				
27. Ask the family what goal they would most like to have help with (i.e., first priority goal or outcome). Ask the family what their next priority is and continue prioritizing goals until all of the concerns the family wants on the plan are included.				
28. Ask the parents to review the list and add anything else.				
29. Once all of the goals are chosen by the parent, specialists share information about how goals might be addressed (i.e., strategy planning). This could happen at another meeting.				
30. Discuss with the team when services will be decided upon—this meeting or a subsequent one.				
31. Thank everyone for their time.				