Central Valley Early Intervention

Guiding Questions Part 1: Meet the Program

- *What does the program have in place related to PBC-DIDM?*
- *What type of effort and effect data is the program collecting?*
- *What other contextual factors might be important for the program to consider?*

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Introduction

The Central Valley Early Intervention (CVEI) program provides comprehensive, Part C, early intervention services to eligible infants or toddlers, ages birth-to-three, with or at risk for disabilities, and their families. CVEI's program director, Tonya Poole, has been in her position for 15 years. Last year, Tonya learned about *Practice-Based Coaching Data-Informed Decision Making* (PBC-DIDM) and shared the approach with the CVEI Leadership Team. The Team discussed how PBC-DIDM would complement the Practice-Based Coaching (PBC), and caregiver capacity-building effective home visiting practices focused on embedded intervention that they adopted 5 years ago and agreed the PBC-DIDM approach was a good fit for their program. CVEI is 14 months into their implementation of PBC-DIDM, and the Team is excited about the progress they are making!

Table 1. Structure of CVEI

Coaches	Early Intervention Providers Receiving PBC Support	Total CVEI Early Intervention Providers	Coaches
4	80	250	4

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Who is on the Leadership Team?

- Tonya (Program Director)
- Dion (Coach)
- Janisha (Coach)
- Sandra (Lead PBC Coach)
- Lori (Data Manager)
- Kris (Family Resource Specialist)
- Alexandra (Provider)
- Paul (Chief Executive Officer of Family Supports Council – host agency for the CVEI program)

What has the PBC-DIDM progress been to date?

The Team rated the *PBC-DIDM Implementation Profile* every 2-3 months during their first year of PBC-DIDM implementation. Big milestones accomplished to date include:
- Identifying a Lead Coach who is supported by external coaches from the state to provide ongoing professional learning support for coaches, including quarterly feedback about their use of PBC, which is provided using a coaching platform
- Revising forms and establishing electronic systems for collecting effort and effect data (e.g., coaching logs, effective home visiting practices checklists)
- Adopting PBC-DIDM Prepare-Look-Think-Act Process for quarterly "Data Chats"

Who are the CVEI coaches, and what coach supports are in place?

- 1 Lead Coach and 3 Program Coaches
  - 1 Lead Coach has been in position as a Lead Coach for 14 months and is being supported by an external statewide coach
  - 2 program coaches have been in their positions for at least 2 years
  - 1 program coach is new this year
- Coaches were early intervention providers prior to becoming coaches
- Coaches engage in PBC with early intervention providers to support their use of caregiver coaching home visiting practices focused on embedded intervention
- Coaches have participated in workshops to learn about PBC and the effective practices that are the focus for coaching
- Consistent forms and procedures in place for coaching
- New electronic system for submitting coaching effort and effect data (e.g., coaching log, action plan, effective home visiting practices checklists) was adopted 6 months ago – some coaches find it challenging
- Sandra, the Lead Coach, supports coaches through (a) bi-weekly data pulls to monitor data, (b) monthly coach community meetings, and (c) individual video-based feedback – it's getting hard to balance her roles

What are some efforts to support providers in using the practices that are the focus of PBC and PBC-DIDM?

- Providers use caregiver capacity-building effective home visiting practices to enhance a caregiver's confidence and competence to meet the needs of their infant or toddler with or at-risk for disabilities
- 2 coach-led early intervention provider workshops each year, informed by home-visiting data and provider feedback from previous workshops
- Monthly individual PBC sessions with providers
- Dose of coaching sessions informed by data about the providers' observed use of home-visiting practices and the early intervention providers' preferences

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Guiding Questions Part 2: PBC-DIDM Implementation Profile

- *How did the roles represented by different members of the PBC-DIDM Leadership Team influence the discussion?*
- *How did the indicator guidance support the PBC-DIDM Leadership Team in rating the Profile?*
- *What Profile tier(s) were the focus of the PBC-DIDM Leadership Team discussion?*

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Reviewing Progress (see Profile Goals – beginning of meeting, p. A)

During their second year of PBC-DIDM implementation, the CVEI Leadership Team met in November to review and discuss the *PBC-DIDM Implementation Profile* and their goals for the next three to four months. The last time the Team met to rate the *Profile* was in June. Although it had been a few months since the Team's last meeting, the *Profile* was stored on a shared drive accessible to all, and smaller work groups were making progress toward the goals set in June.

- Sandra, the Lead Coach, facilitated the meeting
- Tonya, the Program Director, shared her screen and took notes on the *Profile*
- Dion, a Program Coach, kept the Indicator Guidance pulled up for clarifications

The Team started the meeting by reviewing their progress towards the goals set in June (see Goals – beginning of meeting tab, p. A). Sandra shared how thrilled she was to have Lori, the Data Manager, join the PBC-DIDM Leadership Team. Lori's support made the electronic data systems possible. Together, the Team added notes regarding action steps in progress, adjusted the progress tracker, and, when needed, added additional action steps.

Next, the Team briefly reviewed the instructions for rating the *Profile* indicators on the *Instructions* tab and how to access the *Indicator Guidance* tab when needed. Let's listen in on their discussion as they begin looking at the *Profile*…

Reviewing Progress since the last PBC-DIDM Leadership Team meeting in June (see Profile Foundational, p. B)

Lead Coach: Sandra said, "*Last time, we focused on the Initial tier, which is blue. It's important to ensure we build a strong foundation. Please review the blue Foundational indicators on the Profile and note any for discussion or rating adjustments.*" The Team spent five minutes reviewing the Foundational indicators and agreed the ratings were still accurate.

📋 Rating the Initial tier of the Profile during the November PBC-DIDM Leadership Team (see Profile Initial tier, p. C)

Lead Coach: Sandra confirmed there were no changes at the Foundational tier and moved the Team to the Initial tier, which is green. She stated, "*Many indicators rated '0 = Not yet started' relate to our earlier goals. We should see significant progress for this tier, so let's review column by column, starting with Leadership – from IL1 to IL4. IL2 and IL4 weren't fully implemented in June. How are we doing now?*"

CEO Family Support Council: Paul commented on the benefit of Lori's addition to the Team and thanked everyone for their commitment to the PBC-DIDM process. He stated, "*Sandra shared information about PBC-DIDM at our October executive board meeting. It was well received! Your data-informed staffing decisions and the proven investment in coaching help me advocate for PBC's continuation and new coach hires.*"

Program Director/Notetaker: Tonya said, "*I was there, and I agree it was really well received! So, do we agree then that we want to rate IL1 to IL4 as '2 = fully in place?'*" Everyone agreed.

Lead Coach Sandra said, "*As discussed earlier, our goals are linked to IL5, IL6, and IL7. We have systems for a data schedule, but confirming complete data collection about coaching sessions has been challenging.*" The Team revisited their goals to reflect and discuss whether they felt IL5, IL6, and IL7 were at '1 = Partially in place' or '2 = Fully in place.'

Coach: Janisha asked, "*Is IL6 just the home visiting practices checklist? What does 'confirm that data is collected as planned for coaching sessions' really mean? We usually coach individually for 3 to 6 sessions, until they are demonstrating the home visiting practices as intended, but what if sessions are canceled or the provider leaves?*"

Coach: "*The Indicator Guidance for IL6 says, 'A PBC Log is on file for every coaching session,*" said Dion. "*It also mentions the PBC-DIDM Data Mapping Tool might be a resource*." (see Profile Handout, p. D)

Lead Coach: Sandra said, "*So I think IL6 and IL7 are still a 1. For IL6, sometimes, the tracking sheet shows the session occurred, but there's no coaching log in the system. For IL7, sometimes, the log is entered, but a coach writes out 2 hours, which I have to convert to 180 minutes It sounds like a small detail, but it can take a lot of time to clean up the data. This can slow down Coach Community Meeting prep because I need the data to see what the strengths and needs are.*"

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Data Manager: *"How many coaching sessions should coaches have every week?"* asked Lori.

Coach: *"It depends on different things,"* said Dion, *"like if they're implementing as intended or if it's a sustainability check."*

Executive Director: Tonya nodded, *"I think Lori has a good point. When we did the 'Prepare-Look-Think Act (PLTA) data chat' in September, we talked a lot about caseloads and what was feasible for coaches, so they didn't feel like they were spread too thin. So, we know how many sessions should happen each week for each coach, group, or individual, and that's on the Data Mapping Tool schedule."*

Family Resource Specialist: Kris shared how Lori helped her to run regular reports about the number of contacts with families and said, *"If the numbers are lower than expected, we collaborate with families and providers to ensure that children and their families receive the services and supports needed to be successful. Perhaps you could implement something similar. You might generate a report to check how many coaching sessions providers are receiving— I know it's different, but there could be a similar solution in terms of the report you're trying to pull."*

Data Manager: Lori chimed in, *"We can totally do that, so then you know if you have 4 coaching logs for Coach A but only 1 for Coach B. It won't answer the question about whether a log is entered for every session, but it could give you a snapshot of what's been entered to compare with what's expected. Also, to Sandra's point about cleaning up the data, for IL7, we can try to check the response options in the electronic forms to require a response or a number. I just need to know what we want to see versus what we're getting right now."*

Program Director/Notetaker: Tonya said, *"Okay, to bring us back. It sounds like IL5 is a '2 = Fully in place,' but IL6 and IL7 are '1 = Partially in place.' Does everyone agree?"* The Team agreed.

Lead Coach: *"Thanks, Tonya. We have a couple of action items we'll need to work on together for IL6 and IL7. Let's add those notes to our Goals tab, and then we can move to the Initial tier Coach and Practitioner indicators,"* said Sandra.

The Team continued working through the Initial tier indicators, rating all of them as '1 = Partially in place' or '2 = Fully in place.'

Coach: *"Hey, look! We have 1s and 2s for all the Initial indicators!"* said Janisha. *Are we ready to move up?"*

Everyone nodded, and the Team agreed to begin exploring the Mid-tier indicators.

Guiding Questions for Part 3: Setting Goals

- *Why might it be important to rate all indicators as 2 = 'Yes, fully in place' or 1 = 'Partially in place' before moving up to the next tier?*
- *How did the Profile help the Team to identify data-informed goals (see Goals – after meeting on 11.01 tab, pp. F-G)?*
- *Why might it be important to link goals to specific Profile indicators?*

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Rating the Mid-tier of the Profile and Setting Goals during the November PBC-DIDM Leadership Team Meeting (see Profile Mid-tier, p. E)

Provider: *"We're movin' on up!"* Alexandra exclaimed, prompting laughter and celebration among the Team for this milestone.

Lead Coach: *"Remember, each tier builds on the one below it, and we're still working on a couple of goals or action steps in the Initial tier, so it's okay if we have fewer 2s here. Let's just focus on the steps and the good progress we're making,"* said Sandra. *"So ML1 and ML2 are about collecting feedback from the providers and coaches."*

Coach: *"Yeah, and if we look at the guidance,"* said Dion. *"ML3 and ML4 are about using that feedback in the PLTA [Prepare-Look-Think-Act] process. We're committed to using it, but I think we all want a little more practice with it."*

Coach*: "We collect a provider survey at onboarding to kind of see what the needs are,"* said Janisha. *"We also collect the strengths and needs data about the use of home visiting practices, but neither of those is really about the coaching support."*

Coach: *"But the guidance says PBC supports **and** effective practices. We've got the effective practice data, but we need to get the coach part,"* said Dion.

Provider: *"I love working with Dion as my Coach,"* Alexandra shared, *"but I do think some providers might appreciate different options for giving feedback about coaching. What's going well and other types of support they'd like to receive."*

Coach: Janisha said, *"I think it's a 1 = 'Partially in place,' but we need to make some changes and maybe collect the provider survey after coaching rather than only at onboarding and during the workshop."*

Lead Coach: *"These are great ideas. We also don't have a coach survey, but feedback would be useful,"* said Sandra. *"Let's continue rating this tier. Then, we can prioritize the indicators to focus on next, saving time to consider how they might inform our goals."* (see tab for Goals after meeting on 11.01, pp. F-G)