CASEtools
Instruments and Procedures for Implementing Early Childhood and Family Support Practices

Guidelines for Team Meetings When Using a Primary-Coach Approach to Teaming Practices

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This *CASEtool* includes a description of the development and use of guidelines for conducting team meetings when using a primary-coach approach to teaming in early childhood intervention. This *CASEtool* includes four sets of guidelines, *Role of the Facilitator, Presenting Information in Team Meetings, How to Provide Information in Team Meetings, and Agenda-Building for Team Meetings.* A team meeting agenda format is also included as are logistical considerations for the meetings. The guidelines may be used by the team facilitator and all team members in preparation for and during the meeting.

INTRODUCTION

The guidelines for team meetings in this *CASEtool* may be used as part of a primary-coach approach to teaming in early childhood intervention to ensure adherence to the three characteristics of effective team meetings: use of a meeting facilitator, clearly defined roles of the facilitator and other meeting participants, and adoption of a pre-published agenda (Rush, Hansen, Shelden, & Di Bona, 2008). A primary-coach approach to teaming is a particular application of the use of a primary service provider, which is commonly associated with a transdisciplinary teaming model (Woodruff & McGonigel, 1988). This *CASEtool* includes a brief overview of the primary-coach approach, development of the guidelines, and how the guidelines may be used. The reader is referred to Shelden and Rush (2007) for more information about the evidence to support and background related to a primary-coach approach to teaming.

TEAMING PRACTICES

The concept of the use of teams comprised of individuals with a variety of expertise and knowledge in the field of early childhood has been a consistent component of educational legislation (Individuals with Disabilities Education Act Amendments, 20 U.S.C. § 1400 et seq., 1997), recommended practice documents (American Speech-Language-Hearing Association, 2008a, 2008b; Pilkington, 2006; Sandall, Hemmeter, Smith, & McLean, 2005; Woods, 2008; Workgroup on Principles and Practices in Natural Environments, November, 2007) and theoretical and research literature (Antoniadis & Videlock, 1991; Briggs, 1997; Hanft & Pilkington, 2000; Nash, 1990; and Woodruff & McGonigel, 1988). The federal regulations for IDEA, Part C early intervention indicate that teams may consist of audiologists, early childhood educators, early childhood special educators,

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nutritionists, occupational therapists, parents, physical therapists, physicians, psychologists, service coordinators, social workers, speech-language pathologists, and others.

In a primary-coach approach to teaming described by Shelden and Rush (2007) as part of an overall approach for working with infants, toddlers and their families in early childhood intervention programs, the primary coach acts as the principal program resource and point of contact between other program staff, the family, and care providers (i.e., the team). The primary coach mediates the family's and other care providers' skills and knowledge in relation to a range of needed or desired resources (i.e., child learning, child development, parenting supports). Primary-coach teaming practices are characterized by the team members' use of coaching practices as an adult learning style to build the capacity of parents, other care providers, and professional colleagues to improve existing abilities, develop new skills, and gain a deeper understanding of how to promote child learning and development within the context of interest-based, everyday learning opportunities and/or identify and obtain needed supports and resources (Dunst, Bruder, Trivette, Raab et al., 2001; Rush & Shelden, 2005; Shelden & Rush, 2007).

The operational definition of the primary-coach approach to teaming differs from a standard transdisciplinary model of teaming in which one practitioner serves as the primary liaison between the family and other team members (Woodruff & McGonigel, 1988; York, Rainforth, & Giangreco, 1990) by an explicit focus on the type (i.e., coaching) and content (i.e., natural learning environment practices) of interactions between team members and their roles for promoting parent skills, knowledge, and attributions.

The literature on teaming indicates that at least four team task and structure factors (Bell, 2004; Borrill et al., 2001; Borrill et al., 2002; Flowers et al., 1999; Larsson, 2000; West, 2002) must be present for optimal effectiveness. These factors include: (1) Team tasks that allow members to use a variety of skills that result in meaningful work and have positive consequences for other people (Bell; Borrill et al.; Hackman, 1987); (2) An adequate number of team members appropriate to the task (Bell; Larsson); (3) Teams that have some degree of self-managing abilities because a greater degree of team self-man¬agement is related to enhanced team performance (Bell; Borrill et al.; DeDrue & West, 2001; Erez, LePine, & Elms, 2002); and (4) Teams having a common planning time (Borrill et al.; Borrill et al.; Flowers et al.). Each of these four task and structure factors are inherently present in the characteristics of a primary-coach approach to teaming.

During a common team planning time all team members come together on a regular basis versus informal meetings or specific child/family-focused planning meetings that may consist of only the individuals most actively involved with a specific child and family. Formal team meetings are typically scheduled for a particular day and time. Informal team meetings occur as needed by individual team members and families. The guidelines in this *CASEtool* focus on the formal team meeting.

When using a primary-coach approach to teaming (Shelden & Rush, 2007), the purpose of the team meeting is colleague-to-colleague coaching to support the primary coach in building the capacity of the parent or care provider to support the child's participation in everyday life activities in the home, community, and early childhood program settings. The team meeting discussion may be used to determine the status of the current situation, what currently is or is not working, and what the primary coach and care provider have already tried or discussed, followed by sharing necessary resources, supports, and information from other team members. This process may include scheduling a joint visit for another team member to accompany the primary coach to support the primary coach, child, and/or care providers during a visit.

DEVELOPMENT AND USE OF THE TEAM MEETING GUIDELINES

The team meeting guidelines were developed using existing literature on effective teaming characteristics (Bell, 2004; Daniels, 1990; Doyle & Straus, 1982; Holpp, 1999; Kayser, 1990; Larsson, 2000; Weaver & Farrell, 1997) as well as through interviews and surveys completed by members of a multidisciplinary early childhood intervention team that had been working together and using a primary-coach approach to teaming for over one year. The literature and data identified three components to be considered to ensure effective team meetings: logistics, facilitation, and participant interaction style.

Logistics

Team meetings should initially be scheduled weekly and at a time when all team members can attend to guarantee multidisciplinary representation and a diverse perspective (Doyle & Straus, 1982), as well as to ensure that the team has the necessary knowledge and expertise to accomplish the task (Bell, 2004; Doyle & Straus, 1982; Larsson, 2000). All team members should be present for the entire team meeting. For teams with relatively small caseloads or as team members become more comfortable and knowledgeable about working together, thereby becoming more efficient in their use of time, the team meetings may occur every other week. The average length of team meetings is one to one-and-a-half hours.

Parents should be informed of the team meeting and invited to attend if they so desire. Families should know that team meetings are different than Individualized

Family Service Plan (IFSP) meetings, therefore, they will be invited to attend only the portion of the meeting that directly relates to their family and discussions are generally very brief. In most instances, families want to be informed when information about their family is going to be shared at the team meeting in order for them to submit questions or requests for specific information if they do not plan to attend.

Facilitation

Team meetings should be led by a competent facilitator (Doyle & Straus, 1982; Holpp, 1999; Kayser, 1990; Weaver & Farrell, 1997) following a meeting agenda with time limits (Holpp; Kayser) that has been pre-published (Daniels, 1990), which assists in clarifying the purpose of the meeting (Weaver & Farrell, 1997). The team meeting facilitator may or may not be someone other than the formal team leader. Facilitation should not rotate among team members, but rather be the same person for each team meeting. The person responsible for facilitating the team meeting must be someone who either currently has or can develop the skills necessary for ensuring that the guidelines for meeting facilitation (Appendix A) and interaction among participants (Appendixes B & C) are closely followed.

One responsibility of the facilitator is to ensure that each meeting has an agenda that has been developed prior to the meeting. Pre-publishing the agenda may be accomplished by posting the agenda to a location on a program's intranet in order for individual meeting participants to add agenda items prior to the meeting (e.g., Appendix D). Another option might be for team members to call-in agenda items to the facilitator or a support staff person prior to the meeting. Whatever method is chosen for pre-publishing the agenda, this process allows the meeting facilitator to assign times to each item on the agenda when preparing for the meeting prior to the designated meeting time thereby increasing the efficient use of time during the meeting (Holpp, 1999; Kayser, 1990).

The team meeting agenda may consist of five types of items: primary-coaching opportunities, quarterly updates, welcome to the program, transitions, and closures (Appendix E). Optional items that may be added to the agenda include announcements and scheduling. The primary purpose of the team meeting is to provide opportunities for individuals serving as primary coaches to receive support related to their work with individual families as well as provide support to other team members based on their experiences and area of expertise. The primary-coaching opportunities item on the agenda allows primary coaches to ask questions and pose issues as a mechanism for receiving support of other team members. The time allocated for primary-coaching opportunities ranges from 10 to 20 minutes per family depending on the needs of the primary coach. The second agenda item for the team meeting is quarterly updates. Every family should be reviewed by the team at least quarterly as a means for the team to remain current regarding each family's status in the program. Quarterly updates consist of a brief overview of the current plan for supporting the family, status of the plan, and next steps. New children and families recently assigned to the team along with their status in the program (i.e., intake, evaluation, assessment, program planning, etc.) are introduced to the team as part of the welcome to the program item on the agenda. Transitions of families to other programs and closures (i.e., graduation or disenrollment) are shared as part of the remaining two agenda items. Rather than discuss all transitions and closures during the meeting, these two agenda items may be considered as discussion items at the discretion of the person who added the item to the agenda and if time permits.

Optional agenda items include announcements and scheduling. Because team meeting time is limited and costly to programs, announcements should be either preprinted on the agenda or included as an additional handout or part of an electronic message to team members rather than shared verbally. Similarly, since scheduling usually involves only a few team members, all scheduling should be held until the end of the meeting at which time team members can coordinate their schedules. In order to ensure that all team members have their scheduling needs met, the facilitator should allow enough time at the end of the meeting for scheduling to occur while all team members are still present.

Participant Interaction Style

The interaction style of participants affects how team members serving as a primary coach may receive information from other team members and how useful the information coming from other team members is to the primary coach. Implementation of written guidelines can assist participants in being prepared (Holpp, 1999; Weaver & Farrell, 1997) to present information in the team meeting (Appendix B) as well as to provide support to other team members through the use of a capacity-building interaction style during the meeting (Appendix C). The meeting facilitator is responsible for ensuring that all participants adhere to the written guidelines.

IMPLICATIONS OF THE TEAM MEETING GUIDELINES FOR PRACTICE

While the guidelines are designed for use by early intervention programs using a primary-coach approach to teaming, the characteristics of use of a meeting facilitator, clearly defined roles of the facilitator and other meeting participants, and adoption of a pre-published agenda are applicable to teams regardless of the team's model of interaction. The guidelines in this *CASEtool* for presenting information and providing coaching as well as the agenda format may need adaptation by teams using a teaming approach other than a primary coach or primary service provider approach, however, the guidelines for the role of the facilitator and agenda-building should be applicable to all teams.

CONCLUSION

Team meetings should have thoughtfully planned meeting logistics, a meeting facilitator, clearly defined roles of the facilitator and other meeting participants, and a pre-published agenda. As a result, these meetings are more likely to better meet the needs of team members and accomplish the meeting purpose to provide and receive support related to working with families and accessing needed resources to ensure families are receiving comprehensive care.

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Appendix A

GUIDELINES

Role of the Facilitator in the Team Meeting

- Prepublish the agenda
- Start and stop the meeting on time
- Ensure that all items on the agenda are addressed
- Establish and maintain structure of the meeting
- Ensure full participation of all participants
- Control the air time of participants
- Ensure that persons staffing have an action plan and receive what they need
- Ensure that team meeting time is used only for teaming

Appendix B

GUIDELINES

Presenting Information in the Team Meeting

Primary-Coaching Opportunities

The purpose of primary-coaching opportunities is to obtain resources and/or supports from other team members to ensure that you are effectively addressing the family's priorities.

- Prior to the meeting, identify your need for coaching and support from other team members during the team meeting and determine how to present the situation to the rest of the team in a concise manner. Questions to consider:
    - What is my question or issue?
    - What type of support am I seeking (i.e., information, resources, strategies, acknowledgement that I am doing the right thing, assistance in thinking through a situation, joint visit from a colleague, etc.)?
    - What is the minimum amount of information I need to share to ensure team members understand the situation?
- During the meeting, state your need for support in the form of a question or an issue.
- Provide feedback to other team members regarding whether or not they are giving you the support and assistance you need.
- Restate or clarify your question(s) or issue(s) as needed.
- Ensure that you have a concrete and specific action plan before the facilitator moves to the next item on the agenda.

Quarterly Updates

The purpose of the quarterly updates is to ensure that all children and families are brought to the attention of the full team on at least a quarterly basis. If a family is brought to the team during the Primary-Coaching Opportunities section of the agenda, this may also serve as the Quarterly Update. Quarterly Updates should take no longer than five minutes.

- Prior to the meeting, review the staffing report from the previous update. Determine what progress has been made or changes in status have occurred.
- During the meeting, share:
  (1) the length of time you have been the primary coach,
  (2) the current plan for the family, and
  (3) next steps.

Welcome to the Program

The purpose of Welcome to the Program is to ensure that all team members have knowledge of new children and families being served by the team. Welcome to the Program should take no longer than two minutes.

- Prior to the meeting, develop a clear understanding of the families' reason(s) for seeking program supports, family priorities, and what supports you may need from other team members.
- During the meeting, share:
  (1) reason for referral,
  (2) family priorities,
  (3) the initial plan developed jointly with the family, and
  (4) possible supports you may need from the team.

Appendix C

GUIDELINES

How to Provide Coaching in the Team Meeting

- Be certain that you clearly understand the presenter's question or issue.
- Seek clarification of the question or issue, if necessary.
- Be certain that you know what the presenter already knows, has done, or is thinking in relation to the issue or question before providing additional information or ideas.
- Refer to the Framework for Reflective Questioning for types of questions to ask when coaching a colleague during team meeting.
- Be respectful of other team members' lines of questioning. Allow others to finish their questions, comments, or lines of thinking prior to jumping in with another question or before sharing additional information.
- Listen to what the other team members are asking or sharing. If your thoughts, questions, and ideas are addressed, you do not need to jump into the conversation.
- Only one person should talk at a time.
- Direct your questions or information to the presenter, rather than another team member.
- Stay on topic. The focus should be on the presenter.
- Share the air time with other team members.
- Asking questions means that you are open to varied possibilities as answers. Having a predetermined answer that you are trying to get the presenter to say is coaxing rather than coaching.
- Information should be shared only after the question or issue has been adequately defined and the presenters has been given the opportunity to reflect on his/her actions, intentions, ideas, and possible solutions/actions.
- Avoid advice-giving (i.e., statements that include the following words: should, ought to, need to, etc.).
- Ensure that the presenter is getting the type of support he/she intended.
- Check for the presenter's understanding of any information that is being shared. Listen to the presenter and read his/her body language as feedback regarding whether he/she is receiving the type of support he/she wants/needs.
- Ensure that the presenter has a concrete and specific plan to implement prior to ending the coaching conversation.
- Ensure that the plan includes a mechanism for sharing the outcomes of plan implementation either with the entire team or key individuals during a follow-up meeting/conversation.
- The team meeting facilitator has ultimate control of the meeting. His/her requests to close a conversation should be respected.

Appendix D

GUIDELINES

Agenda-Building for the Team Meeting

1. All primary-coaching opportunities, quarterly updates, welcome to the program, transitions, and closures must be posted to the agenda 24 hours prior to the start time of the team meeting. Agendas are located on the shared drive.

2. No additional items may be added to the agenda within 24 hours of the staffing meeting unless the situation requires immediate support. If the situation requires immediate support and occurs within 24 hours of the staff meeting, you may request for the item to be added to the agenda at the beginning of the team meeting.

3. Transitions and closures will be posted to the agenda for team members' awareness only and will not be discussed during the meeting unless a team member has a particular question that would involve more team members than the primary coach.

4. Timeframes will be assigned to each agenda item by the team meeting facilitator prior to the team meeting.

Appendix E

Team Meeting Agenda

Date: _______________

Team Members Present: ____
____
____
____
____

Primary-Coaching Opportunities:

Primary Coach	Family	Question/Issue

Quarterly Updates:

Primary Coach	Family

Welcome to the Program!		Transitions		Closures	
Family	Primary Coach	Family	Primary Coach	Family	Primary Coach