



Systems Coaching: Coaching For Competence and Impact

Coaching Service Delivery Plan Template

Michelle A. Duda, Ph.D.

OSEP Center on State Implementation & Scaling-up of Evidence-based Practices Center (SISEP)
and

Susan Barrett

OSEP Center on Positive Behavioral Interventions & Supports (PBIS)



State Implementation
& Scaling-up
of Evidence-based Practices



OSEP Center on
**Positive Behavioral
Interventions & Supports**
Effective Schoolwide Interventions



The Purpose of this document is to help your Implementation Team develop a coaching delivery plan that is linked to sharing knowledge and developing skills and abilities required for implementers to be successful.

Coaching Service Delivery Plan

Coaching Service Delivery Plan Development

Background and Rationale

Professional development, support, and feedback are keys to quality service delivery and to improving service delivery over time and across staff. Coaching has been demonstrated as a key element to ensure implementation, fidelity, and quality of services. A Coaching Service Delivery Plan details the mutual responsibilities of the Coach and the Teacher or Educator. Both must participate fully in order for the coaching relationship to be beneficial to patients/clients. The Coaching Service Delivery Plan is a proactive approach to purposeful and supportive coaching and is the responsibility of both the Coach and the Teacher or educator to develop together. It specifies the Coaching Elements that will promote quality service delivery, support for the Teacher or Educator, and serve as the basis for further professional development. It details the responsibilities of both the Coach and the Teacher or Educator.

Sound coaching relies on multiple sources of data including qualitative reports of activities, observations, and issues from the Teacher or Educator as well as data related to service delivery timeliness, perceived quality and helpfulness of the service by stakeholders, and outcomes of service provision. By developing a Coaching Service Delivery Plan and then adjusting it over time – always with the goal of improved service to children and families – the Coach and Teacher or Educator can partner in this quality improvement effort. The template provided below and the suggested Coaching Elements that follow provide the basis for developing the Plan.

Coaching Inventory Discussion Tool

The Elements, Frequency, Documentation, and Timelines for activities should be reviewed every 3-4 months for the first year and at least annually thereafter with an eye to improving the quality and functionality of the Plan. The effectiveness of the plan is monitored should also be mutually agreed upon by Coach and Teacher or Educator and identified in the plan. Data from the Service Delivery plan should be monitored by the Implementation Team. The Implementation Team will ensure that data are aggregated and fed back to the trainers and the data are used to inform the Performance Assessment.

Coaching Service Delivery Plan Development-Template #1

Step 1: Identify who will be involved in Coaching and Define What Skills are required to reach fidelity and achieve outcomes?

Tip: referring to Practice Profile Activity #2 (Implementer Knowledge, Skills and Abilities) may be helpful

EBP/Practice: _____

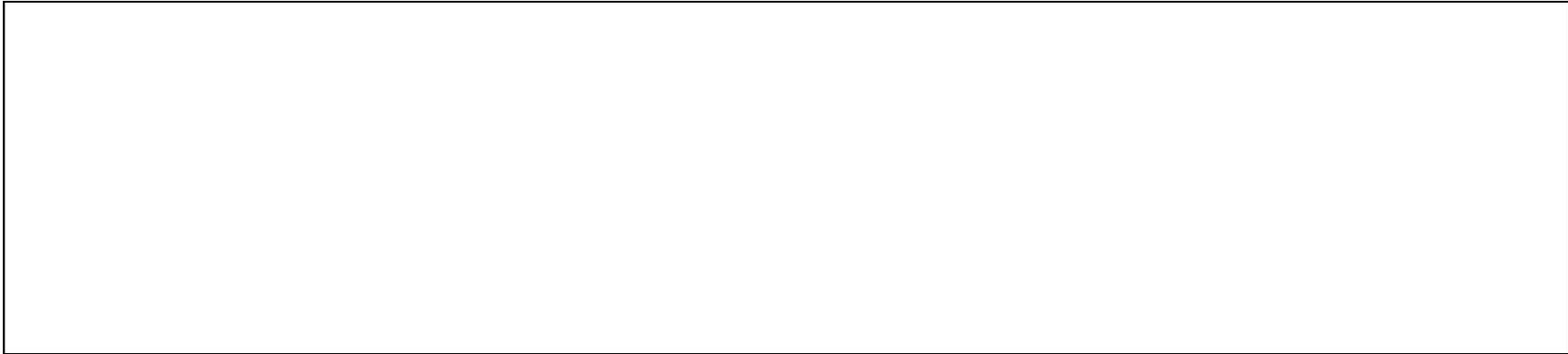
Who will be receiving the coaching: _____ Who will be providing the coaching: _____

Who will be holding the coach accountable: _____

What are the goals (observable and measurable)? What skills are required to achieve goals?

How will performance feedback be provided? What data will be used to indicate progress ?

- **Specificity: Make sure feedback is linked to measureable goal.**
- **Timeliness: Sooner is better**
- **Manner: presented in a positive, supportive way**



Step 2: Decide How Much Coaching is Necessary?

Use the table below to determine if the skills you are coaching are new or current, and if the content is new or current. It may be helpful to create a list of the all of skills that you are coaching for and match them to the appropriate levels of coaching.

		Skills	
		New	Current
Content	New	High Level Intensity	Mid-level Intensity
	Current	Mid-level Intensity	Low Level Intensity

Step 3: Review Coaching Elements and Functions

Core Coaching Elements

Below are some examples of core Coaching Elements that are key to successful coaching: Case reviews; Documentation and Data Reviews; Observation and Feedback; and Stakeholder Feedback. Each of these should be considered and planned for in developing the Coaching Delivery Plan. Within your context and informed by previous successful coaching experiences there may also be other components you want to consider.

File Reviews

Function or Purpose: Assist the Teacher or Educator in problem-solving difficult issues that arise during the work by:

- Developing the Teacher or Educator's analytical skills related to problem-solving (e.g. clear problem definition, understanding of the context of the problem, generation of options, consideration of criteria for a positive resolution, consideration of benefits and challenges related to each option, data to be used as indicator of success)

Documentation and Data Reviews

Function or Purpose: to ensure that services (i.e. completion or risk assessment, Interdisciplinary Team action plan, etc.) are being delivered in a timely manner and with quality.

Example

- *Linking Risk Assessment to Action plan development:* The Teacher or Educator will complete the risk assessment (Braden or SCIPUS) within the specified time. Depending on the score, Teacher or Educator will contact the clinical coordinator to trigger the Interdisciplinary action planning process. The purposes of reviewing the process of *Linking Risk Assessment to Action plan development* are for the Teacher or Educator:
 - To work with the Coach to resolve challenging problems
 - To ensure that services are timely and appropriate
 - To analyze inquiries for the Action Plan Development over time to see if issues continue to arise and where the sources of the changes are. This may require an additional focus on:
 - Skill development for the Teacher or Educator
 - Systemic issues that need to be resolved outside the unit

- Administrative issues that need to be resolved by the leadership team (outside

Observation and Feedback

Function or Purpose: to provide feedback on key skill sets required for quality services and may include:

Example

- Coach or other identified individual conducts a reliability check on completion of activities (i.e. fidelity checklist)
- Coach observes the implementers of the Interdisciplinary team complete and execute the action plan
- Meetings with next generation implementers to introduce this new way of work
- Meetings with students to see how things are going
- Observation using EBP/EII components as intended
- Meetings or events for which the Teacher or Educator requests the support of the Coach

Stakeholder Feedback

Function or Purpose: to assess the satisfaction of key stakeholders with the service, to identify strengths of the service and the Teacher or Educator, to analyze challenges and to plan for program adjustments and for further professional development of the Teacher or Educator.

Examples of three possible stakeholder feedback elements:

- Biannual stakeholder survey of key personnel who interact regularly with the Teacher or Educator
- Biannual survey of patients/ consumers who have been impacted by the services of the Teacher or Educator
- And/or Annual Focus group of patients/consumers parents who used the services

Define Other Coaching Elements you may consider

STEP 4: Coach will Develop Coaching Service Delivery Plan -Coaching Service Delivery Plan Template

Skill Being Coached	Coaching Element (e.g. Direct observation)	Frequency (including planned changes as the Teacher or Educator gains experience)	Teacher or Educator Preparation (e.g. Data or Documentation for review to be provided by Teacher or Educator and a clear timeline for submission to the Coach)	Post-Meeting/Event Documentation by the Teacher or Educator	Feedback & Documentation by Consultant (e.g. Forms/Feedback to be completed post-meeting)	Timeline for Written Documentation by Consultant (e.g. 72 hours after Verbal feedback, quarterly)
					Verbal Only Verbal and Written Written Only	
					Verbal Only Verbal and Written Written Only	
					Verbal Only Verbal and Written Written Only	
					Verbal Only Verbal and Written Written Only	
					Verbal Only Verbal and Written Written Only	

Acknowledgements

The authors would like to thank and acknowledge the SISEP Coaching for Competence and Impact Community Members who have contributed to the community and have help shaped this work. Their invaluable commitment and expertise in coaching and applied implementation science served as the foundation for this brief series and is making an impact on the students we all strive to serve.