**Fidelity Assessment: Information for Planning**

General

All certified EI Professionals and EI Specialists who provide EI services other than eligibility determination and assessment must complete fidelity assessment requirements as follows:

* **New practitioners** who are hired by or contract with a local Infant & Toddler Connection system on or after October 1, 2017 must, in each of their first two years in the Infant & Toddler Connection of Virginia, complete at least 2 self-assessments using the *Coaching in Action* checklist and be observed at least once by a qualified observer. In the first year, one of the self-assessments and the observation may be completed using the requirements detailed in the *Orientation to Coaching and Natural Learning Environment Practices* checklist instead of using the *Coaching in Action* checklist.
* **Practitioners already working** in a local Infant & Toddler Connection system as of October 1, 2017 must complete at least 2 self-assessments using the *Coaching in Action* checklist by September 30, 2018 and at least 2 additional self- assessments between October 1, 2018 and September 30, 2019. Each practitioner must also be observed at least once by a qualified observer by September 30, 2019.

Once the requirements are met in the second year, the need for and frequency of additional self-assessment and observation will be determined by the supervisor for each individual practitioner based on the results of the year 2 self-assessments, observation, record reviews, and ongoing supervision.

Self-Assessment

* Must be completed at least 4 months and no more than 6 months apart (unless completing more than 2 per year)
* Must use *Coaching in Action* checklist (except that new practitioners may use the self-assessment requirements detailed in the *Orientation to Coaching and Natural Learning Environment Practices* checklist instead of the *Coaching in Action* checklist for one of the self-assessments completed in year one).
* Practitioners who work in more than one local system are not required to complete fidelity assessment separately for each local system. Rather, the required fidelity self-assessment and observation results must be shared with all local systems with whom the practitioner works. The impacted local systems and practitioner (or contract agency for whom s/he works) must work out the responsibilities for observation.
* Record the amount of time spent completing the self-assessment and reviewing the results of the self-assessment and observation with supervisor and/or observer for credit toward the 30 hours of professional development required for EI certification.

Observation

* May be conducted in person or by review of a video.
* Must use *Coaching in Action* checklist (except that the observation requirements detailed in the *Orientation to Coaching and Natural Learning Environment Practices* checklist may be used in year one for new practitioners instead of the *Coaching in Action* checklist).
* Must be conducted by a qualified observer:
  + (a) Master Coach **OR** (b) at least 6 months experience using Rush and Shelden or similar model of coaching plus 8 hours of professional development on coaching **OR** (c) at least 4 months experience plus 4 hours of professional development on coaching and observed and approved by master coach or other qualified observer
  + **PLUS** Texas module

\*Professional development may include but is not limited to: Rush and Shelden regional training, book study of *Early Childhood Coaching Handbook*, Coaching Implementation Project participation, local or regional coaching training, participation in coaching community of practice, book study, classes, webinars, supervision of and feedback on your own coaching practices, observation/work with mentor

* Local lead agency determines which qualified observers in the local system will conduct observation (also may be designated through contracts with provider agencies).
* Observers must maintain documentation of their qualifications and produce those upon request by the local or state lead agency.
* When the observer is not the practitioner’s supervisor, coordination must occur between the practitioner, observer and supervisor to ensure information from the observation is shared and used to identify and meet the practitioner’s need for ongoing supervision, professional development and support related to coaching.
* Observer records the amount of time spent completing the observation and reviewing the results of with the practitioner and/or her supervisor for credit (up to 15 hours) toward the 30 hours of professional development required for EI certification

Practitioner Responsibilities

* Complete self-assessment at least twice a year using the *Coaching in Action* checklist
* Maintain a copy of the completed checklists for at least 3 years and make available to the local system manager and DBHDS upon request
* Share results of the self-assessment with supervisor and revise Professional Development Plan as needed, based on the results and need for additional professional development and support.

Supervisor Responsibilities

* Review results of the self-assessments and observation to inform ongoing supervision and support
* Review the practitioner’s Professional Development Plan to determine the need to add activities related to coaching

Local System Manager Responsibilities

* Ensure all practitioners, including contract providers, are aware of fidelity assessment requirements
* Determine how and by whom observations will be conducted in the local system
* Add requirements to contracts with provider agencies and independent providers, as needed, to ensure fidelity assessment requirements are met
* Compile results from observations and submit to DBHDS annually using the required form and in accordance with timelines specified in local contract (beginning in SFY 2019).
* Use fidelity assessment results to identify and address local professional development needs related to coaching.

Considerations

* Who in the local system is qualified to be an observer and who will you actually use? Is there any option/advantage to pooling resources regionally or across a couple of local systems if observers are in short supply or travel distances are an issue?
* What would you need to put in place in order to use video for observation?
* How will you track that requirements are met (maybe database or Excel tool from Richard)?
* What do you need to add to contracts with providers/provider agencies:
  + Require self-assessments
  + Designate responsibility for observation, as appropriate
  + Specify responsibility for reporting to local lead agency at least annually (results of observations if conducted by the contractor, number of practitioners that completed all requirements or an assurance that all requirements completed by all practitioners)
* In situations where a contract agency has practitioners who work across multiple local systems, it makes sense to ask the contract agency to conduct the required fidelity observations and provide the results to each local system.