Consultant
On-site Consultation Checklist

Date Accomplished

Step 1—Establish Relationship
Identify potential consultees who have needs and request assistance.
Arrange first visit.
_____ Describe on-site model of consultation to potential consultees. If stated need equals good match, begin consultation process.
_____ Gather information to construct an overall view of the program (history, mission, work culture)
_____ Build rapport and establish trust through continued visits.

Step 2—Provide Training on Rating Scale
Schedule rating scale training with consultees and other interested child care staff.
_____ Provide training on appropriate rating scale.
_____ Continue to discuss consultation process and roles.

Step 3—Jointly Assess Needs
_____ Schedule time to administer scale (initial observation).
_____ Take “before” pictures (optional).
_____ Consultant administers rating scale.
_____ Consultees administer rating scale.

Step 4—Develop Action Plan
_____ Meet with consultees to discuss rating scale results.
_____ Summarize consultees’ concerns and priorities related to assessment results.
_____ Identify themes and priorities on which to focus consultation.
_____ Develop Action Plan based on rating scale scores and assessment of needs through consensus meeting.
_____ Determine knowledge, skills, and resources needed to address Action Plan goals and strategies.
_____ Schedule meeting with consultees to begin work on Action Plan.
On-site Consultation Checklist (continued)

Date Accomplished

Step 5—Implement Action Plan
- Continue to schedule meetings to work on goals outlined on Action Plan.
- Review Action Plan with consultees to monitor progress.
- Evaluate the effectiveness of the plan.
- Provide consultees with encouragement and support.
- Set date to end consultation.

Step 6—Evaluate Changes
- Schedule a time to re-administer rating scale to document change.
- Encourage consultees to schedule a time to re-administer rating scale to document change (optional).
- Take “after” pictures to compare with “before” pictures (optional).
- Administer scale (concluding observation).

Step 7—Write Final Report
- Write final report.
- Share final report with consultees.
- Share views about the consultation relationship and satisfaction with the consultation process.
- Consultees complete Participant Evaluation of Consultation.
- Congratulate the staff on a job well done!
- Congratulate yourself on a job well done!

Step 8—Identify Future Needs
- Discuss future directions or additional needs with consultees. Refer to additional resources if indicated.
Consultees
On-site Consultation Checklist

Date Accomplished

**Step 1—Establish Relationship**

- [ ] Listen to description of on-site model of consultation given by consultant. If stated need equals good match, begin consultation process.
- [ ] Help the consultant develop a better understanding of your program (history, mission, work culture)

**Step 2—Receive Training on Rating Scale**

- [ ] Schedule training on environment rating scale with consultant.
- [ ] Attend training on rating scale.

**Step 3—Jointly Assess Needs**

- [ ] Schedule a time to administer scale (initial observation).
- [ ] Take “before” pictures (optional).
- [ ] Consultant administers scale.
- [ ] Consultees administer scale.

**Step 4—Develop Action Plan**

- [ ] Meet with consultant to discuss rating scale results. Share your scores, concerns, and priorities.
- [ ] Develop Action Plan based on rating scale scores and assessment of needs through consensus meeting.
- [ ] Consider knowledge, skills, and resources needed to address Action Plan goals and strategies.

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Schedule meeting with consultant to begin work on Action Plan.

Consultees
On-site Consultation Checklist (continued)

Date Accomplished

**Step 5—Implement Technical Assistance Plan**

_____ Continue to schedule meetings to work on goals outlined on the Action Plan.

_____ Review Action Plan with consultant to monitor progress.

_____ Set date to end consultation.

**Step 6—Evaluate Changes**

_____ Consultant schedules a time to re-administer scale to document change.

_____ Take “after” pictures to compare with “before” pictures (optional).

_____ Consultant administers scale (concluding observation).

_____ Consultees administer scale (optional).

**Step 7—Final Report**

_____ Review final report with consultant.

_____ Provide feedback about the consultation relationship and process.

_____ Complete Participant Evaluation of Consultation.

_____ Congratulations on a job well done!

**Step 8—Identify Future Needs**

_____ Discuss additional needs and future directions with consultant.