



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.

Consultant
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.

_____ 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.