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Protocol for the Routines-Based Interview™ With The ecomap

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Introduction

The Routines-Based InterviewTM (RBI) is a semi-structured clinical interview designed to help families decide on outcomes/goals for their individualized plans, to provide a rich and thick description of child and family functioning, and to establish an immediately positive relationship between the family and the professional. Ideally, interviewers are trained to conduct the RBI. On the other hand, with the use of this protocol, a professional who is knowledgeable about child development, knowledgeable about child and family functioning, and who has good interview skills should be able to conduct a successful RBI.

The protocol can be used from the beginning of the process (i.e., making arrangements) through to the family's putting goals they've selected into priority order. Space is provided for the professional to write down information at the different stages of the interview. Because the RBI is a needs assessment as well as a descriptive assessment of child and family functioning, some professionals will want to keep a copy of a completed protocol. The family should approve of how the protocol is being used.

The protocol is organized in the order in which steps in the process happen. Spoken statements, which of course the interviewer can modify, are in *bold italics*. The document is organized as a fillable pdf to protect the original version. It can be completed by hand or with typing

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Arrangements

1. When scheduling the RBI, tell the family,
 - a. *The meeting will last 2 hours;*
 - b. *It's an in-depth discussion about you and your family's day-to-day living or as much of it as you want to tell us;*
 - c. *The main purpose is to find out how early intervention can best support you and your family;*
 - d. *In addition to yourself, is there anyone else you would like to have involved in this discussion?*
 - e. *We can meet at your home or another quiet place. What location would work best for you?*
 - f. *The meeting works best if there aren't too many distractions, so is there anyone to watch the child (ren)? If not, it's OK. We can manage.*
 - g. *What time would work best for you? Remember, we'll need 2 hours.*
2. If the child is to be present, ask for the home. This will increase the likelihood that materials such as toys, diapers, and food will all be available.
3. If you prefer, find a secondary interviewer. This is recommended, especially for inexperienced interviewers or those who find it difficult to take notes while keeping a conversation going.
4. Be clear with the secondary interviewer what role you would like them to play. Examples include
 - a. Writing notes;
 - b. Helping to ask questions about most routines (if you really want the secondary interviewer to do almost a joint interview);
 - c. Asking questions if you miss something important (if you really want to do the interview mostly on your own);
 - d. Minimizing distractions, such as by entertaining children (always the role of the secondary interviewer, not the primary, if someone has to do it);
 - e. Scoring an instrument based on the interviewees' answers.

Name of parent making arrangements: _____

Child's name: _____

Child's age: _____ Date & Time of interview: _____

Place of interview: _____

Primary interviewer: _____

Secondary interviewer: _____

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Set Up

1. Seat primary interviewee (e.g., mother) at 45 degrees to primary interviewer.
2. Seat family members together and secondary interviewer next to primary.
3. If given a choice, a kitchen or dining room table is slightly better than living room furniture, but it's not worth insisting.
4. Introductions: Make sure everyone knows who everyone is and why he or she is there.

Present for Interview

Name	Role

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Introduction to the RBI and the Eco-Map

- 1) *The main purpose of today's meeting is to go through the day-to-day activities of your family to find out how early intervention can best support you and your family. This is the best way of organizing our thoughts. If there's anything you don't want to say, please don't say it! You can end this at any time. OK? At the end of the meeting, we'll have a list of priorities that you would like the EI team to help you with. If we don't finish today, we'll find another time, but we should try to finish today so we can get started on interventions as quickly as possible.*
- 2) *Before we begin, can you please tell me*
 - a) *Why is [your child] in [or referred for] early intervention?*

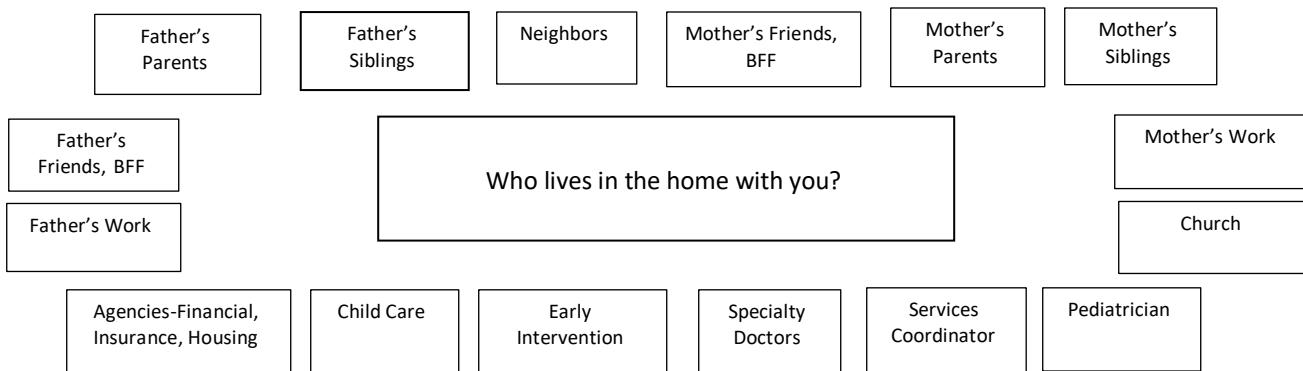
Reason for early intervention:

- b) *What are your main concerns for your child and family?*

Main concerns:

- c) [Show interest and write these down but do not seek much elaboration.]
- d) [At any time in the interview, if the parent mentions something that is a problem, a desire, or otherwise a likely candidate for an outcome, mark it for easy retrieval. I draw a star next to it.]
- 3) *One of the tools we find helpful in getting to know families is the ecomap. The ecomap identifies all of the people who are currently involved in your and your child's life. This might include family members, friends, neighbors, doctors, agencies, and so on. This will help us make better recommendations when we are working with you and may help identify supports your family might need*
- 4) *Let's start with your immediate family; tell me, who lives in your home with you.*
- 5) Using the prompt – *Tell me about.....* ask about the potential family supports below:

Informal Supports



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Formal Supports

Good Questions to ask re: informal supports: **How often do you see or talk with this person? How are things going with them? If something cool happened with one of your children, who would you call? If you had an emergency (or had to call someone in the middle of the night), who would you call?**

Only for formal supports ask: **Do you like them or are you satisfied with this relationship?**

- 6) Wrapping up the ecomap: **Does this picture look like what we talked about? Should I change anything? Are there any supports you currently don't have that you would like to have on this list?** Give the family an opportunity to add to or subtract anything they wish. **What do think about this picture?**

If the family says, "That's a lot of people," you can say things like, "**You're right. You have a lot of support**" (informal supports with thick lines) and, if they have lots of formal supports, "**We'll try not to complicate your life even further,**" which sets you up for streamlined service decision making.

If the family says, "I don't have a lot of people, do I?" which they rarely do, you can say, "**True. If you want to build this up, we can help you with that.**" If you think it looks pretty thin, you can say, "**If you're happy with this, great. If you want to get connected to more people, we can help with that.**"

- 7) Tell the family what will happen next with the ecomap, such as: **This really helped me get to know you and your family. I'd like to keep it so that as we develop the IFSP, we can use this information to address your priorities. Just like all other information you share with me (and the team), it will be kept confidential and only shown to people you want to see it. Would you like me to make you a copy?**
- 8) **Now we're going to talk about your family's daily activities.**

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The Day

Getting into the Routines

- 1) **"How does your day begin?"**
 - a) [Make sure the discussion is about how the parent's day begins, not the child's]
 - b) **START TAKING NOTES ON ROUTINES PAGES.**
- 2) **"What's everyone else doing?"**
 - a) [If the child is awake, get a description of what the child is doing?]
 - b) [Regardless of whether the child is awake,] "**On a scale of 1 to 5 [1 being terrible; 5 being fantastic], how much do you like this beginning of your day?**"
- 3) **"What happens next?"**
 - a) [This is the transition question throughout the interview. It allows the parent to describe their day, rather than having the interviewer assume what the family does, including the order in which they do it.]
- 4) **"Let's back up and deal just with your child's getting up."**
 - a) [Commonly, parents have to be slowed down, because they don't yet know the level of detail desired. These early-morning routines are the time to show the parent how much information to give in each routine.]
- 5) [Assuming this is the first routine involving the child,] "What is everyone else doing?" [Trying to determine normative conditions for this routine and what the family has to contend with.]
- 6) **"What is your child doing?"**
 - a) [Allow a response to the open-ended question and then, if necessary, follow up with these next questions.]
 - b) **"How is your child participating in this activity?"**
 - i) [Try to find out whether the child is highly engaged, just following the routine, or not participating.]
 - c) **"How much does your child do for him- or herself?"**
 - i) [Ask developmentally appropriate questions about the child's independence. You have to know your child development!]
 - d) **"How is your child interacting** [use simpler terms if necessary] **with others at this time?"** [Ask developmentally appropriate follow-up questions about communication, self-regulation, cooperation, and social skills. Generally, getting along with others during the routine.]
- 7) **"On a scale of 1-5, how well do you feel this time of day goes for you?"** [This is a variation on the satisfaction question.]
- 8) [Repeat Questions 2)-7) for each routine.]
- 9) [If necessary,] **"Let's skip to dinner preparation time"** [or another possible later routine. With some interviews, it is necessary to move the conversation along].

Routines

Concern		Routine Rating
★		<ul style="list-style-type: none">• What does this look like? Where is everyone?• How does the child participate?• How independent is the child?• What's the child's communication like?• How does the child get along with others?• Anything else?• Optional: What else could the child be doing?• 1-5 (terrible-fantastic) scale

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End of Interview

- 10) [After the last routine, if less than 1.5 hours has elapsed since the start of the meeting] "*Is there another typical event or activity we should discuss?*" [If time, ask about weekends.]
- 11) "**Now let me ask you two or three general questions. Do you have enough time for yourself or for yourself and another person?**" (Ask only if this information was not given previously)
[Write down the answer, marking it as a concern, if appropriate.]

Time Alone/With Another:

- 12) "**When you lie awake at night worrying, what do you worry about?**" [Write down the answer, marking it as a concern, if appropriate.]

Worry:

- 13) "**If you could change anything about your life, what would it be?**" [Write down the answer, marking it as a concern, if appropriate.]

Change:

- 14) **Now I'll go back through and remind you of the concerns you mentioned.** If a secondary interviewer is involved say "**Now my colleague will go over the things we talked about, to remind you.**"

- a) [Review the list of marked items so the parent can see them. The parent is looking at the notes with the interviewer. This is symbolically important as well as pragmatic].
"Should we add anything?"
- b) [Parents will sometimes elaborate, but this is not encouraged at this late stage.]
- c) [Do not write a list of starred concerns.]

Outcome selection

- 15) **If a secondary interviewer is involved, she turns the lead back to the primary interviewer.**
[Setting the pages down, the primary interviewer says] "**Now tell me what you would like to be on the actual list of things to work on.**"
 - a) [On a clean sheet of paper, write down what the parent chooses. If necessary, refer to the marked items to remind the parent.]
 - b) [If the parent mentions a skill with no reference to the context or function (e.g., "I just want him to be able to talk"), ask during which "times of the day" it would be helpful for the child to be able to have that skill.]
 - c) [If the parent mentions a service with no reference to the function (e.g., "I just want him to have physical therapy"), ask what skill that would be helpful for, and then, if necessary, during which times of the day the skill would be helpful.]

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- d) [Refer back to starred items if the family doesn't remember important things, especially if the parent seems to think some things, such as parent-level needs, shouldn't be on the plan.]
 - e) [If the parent chooses fewer than 10 outcomes, hand over the notes, saying] ***Let me give you these notes to make sure you have everything you want. Remember the stars are next to things that sounded like important things to you.***
 - f) [If showing the notes still generates fewer than 10 outcomes, join the parent in looking at the notes, pointing out items that seem important to the parent or you, saying] ***Let's have a look to make sure there's nothing else. Maybe the handwriting is difficult to read.*** [This step can be difficult if the primary interviewer is trying to read a second person's notes.]
- 16) [Once 6-10 priorities have been listed and no more seem to be forthcoming,] "***Now let's put this list into order of importance. Which one is the most important one to you?***" [Put a 1 next to that priority.] "***Which is next?***" [Continue for the whole list.]
- 17) "***This is a great list of things to work on. I'll consult with other team members and the next time we meet we'll write down their ideas and your ideas for the strategies to begin addressing these. At that time, we'll decide what services are needed to get these priorities or "outcomes" addressed.***"
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Things to Change—to Work On (Outcomes/Goals)

Priority Order	Outcome/Goal

- 18) "This is a great list of things to work on. I'll consult with other team members and the next time we meet we'll write down their ideas and your ideas for the strategies to begin addressing these. At that time, we'll decide what services are needed to get these priorities or "outcomes" addressed."

McWilliam, R. A. (2010). *Routines-based early intervention*. Baltimore, MD: Brookes Publishing.