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**PROTOCOL FOR THE  
ROUTINES-BASED INTERVIEW™  
WITH ECOMAP**

## Introduction

The Routines-Based Interview™ (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.

## 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:** \_\_\_\_\_

## Set Up

1. Arrange seating so lead interviewer is next to parent and note taker, if there is one, is next to the lead.
2. If given a choice, a kitchen or dining room table is slightly better than living room furniture, but it's not worth insisting.
3. Introductions: Make sure everyone knows who everyone is and why he or she is there.

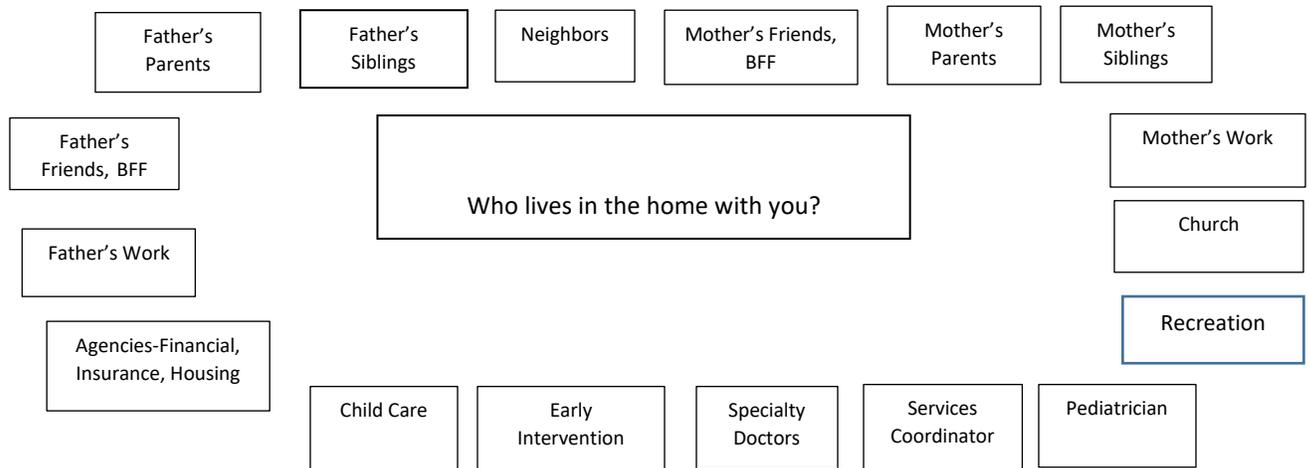
## *Present for Interview*

Name	Role

## 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) *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*
- 3) *Let's start with your immediate family; tell me, who lives in your home with you.*
- 4) Using the prompt – *Tell me about.....* ask about the potential family supports below:

### Informal Supports



### Formal Supports

Good Questions to ask about 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?**

- 5) Draw informal supports above the nuclear-family box Draw w lines of three thicknesses to indicate your perception of support: strong, moderate, simply present. Draw dashed line to indicate source of stress.
- 6) Wrapping up the ecomap: *Does this picture look like what we talked about? Should I change anything? Are there any people you currently don't have that you would like to have on this*

**picture?** 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 again that this information will be used to help meet the goals the family will decide on at the end of the RBI and tell them 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?***



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*Draw ecomap here*

## Main Concerns

- a) ***Before we start talking about your day-to-day life, what are your main concerns for your child and family?***

Main concerns:

- b) [Show interest and write these down but do not seek much elaboration.]  
c) [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.]

***Now we're going to talk about your family's daily activities.***

## 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) ***"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.]
- 3) ***"What's everyone else doing?"***
- 4) ***"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?" (Engagement)***
    - 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?" (Independence)***
    - 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?" (Social Relationships)***
    - i) [Ask developmentally appropriate follow-up questions about communication, self-regulation, cooperation, and social skills. Generally, getting along with others during the routine.]
- 5) At any time, ask for the interviewee's perspective on behaviors (why he or she thinks the child does what he or she does).

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- 6) Ask what the interview would like to see happen 6 months hence, if and only if there were no problems in the routine: **"Six month from now, what would you like to see your child doing at this time of day that he's not doing now?"**
- 7) **"On a scale of 1-5, with 1 being terrible and 5 being great, how would you rate this time of day?"**
- 8) **"What happens next?"**
- 9) [Repeat Questions 2)-5) for each routine.]
- 10) [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. You can also skip ahead by asking **"What's the worst time of day for you?"**]

## Routines

Concern ★		Routine Rating

- 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-great) scale

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

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## *End of Interview*

11) [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.]

***Next 3 questions are required script-use exact wording:***

12) ***"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:**

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

**Worry:**

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

**Change:**

15) ***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.]

### **Goal Decision Making**

16) ***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 work on."*** [This is Stage I of goal decision making.]

a) **[Stage I.** On a clean sheet of paper, write down what the parent chooses.]

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.]

d) [Give the parent plenty of time to think about what they might want.]

e) **[Stage II.** Once the parent can think of nothing else, hand the parent the notes.] ***"Why don't you look through these notes to see if there's anything else you'd like to add."***

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- f) [It is permissible to tell the parent what you're aiming for.] **"We're thinking you probably have 10 to 12 goals."**
  - g) [Stage III. Once the parent has added some goals from the notes, look at the notes together and find out whether other things it sounded like the parent wanted to change (i.e., starred items) might not be goals.] **Let's have a look to make sure there's nothing else. Maybe the handwriting is difficult to read**
  - 17) [Once 10-12 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.]
  - 18) **"This is a great list of things to work on. Next, we will write these goals to be measurable and talk to you about what services might be appropriate to help you meet them."**
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