

## **APPENDIX A**

### **SELF-STUDY FORMS**

- ✧ **Self-Assessment for Report Writing**
- ✧ **Environmental Support for Report Writing**
- ✧ **Individual Change Plan for Report Writing**

## Completing a Self-Assessment of Report Writing

The assessment instrument is divided into four areas: Background information, Procedures and Tools, Findings, Conclusions and Next Steps. Each area has a section on Content Indicators which addresses the specific content that you might consider including in your report. Each section also has a part on Quality Enhancement, which addresses items to avoid as well as composition and organization items.

Select two reports for assessment. For each report selected, enter your judgment on the self-assessment form of the degree to which the report reflects the criteria listed. Although you can assess your reports against all four areas, it may be more useful to select one area to assess. Work within that area until you are satisfied with the changes you have accomplished. Then, select another area.

1. To record your judgment, place a checkmark under the appropriate column.

**Strength** indicates that this indicator is a strength in this report.

**Needs change** indicates that this indicator is present but needs improvement.

**Missing** indicates that this indicator is not present but should be.

**Not needed** indicates that this indicator is not appropriate or applicable to this report.

2. After evaluating both reports, examine the self-evaluation form for indicators consistently marked Needs Change or Missing. This will help you in pinpointing which elements you may want to change. Remember, not all criteria should apply to all reports. Enter potential elements for change at the end of the section you assessed.
3. Select **one** element to work (e.g., tools portrayal, tone, background information – child’s family, etc.). Mark your selection by entering the date next to the element under the appropriate section.

Selection advice:

- a. We advise against attempting to change everything all at once. Work with your chosen element until you have achieved the change you desire.
- b. Choose an element to change because it is personally meaningful rather than one fraught with problems. In order to maintain momentum for change, it is important to experience success.

Area: Background Information -- Content Indicators	Report One				Report Two			
Child's Information	strength	needs change	missing	not needed	strength	needs change	missing	not needed
Characteristics: likes and dislikes, personality, self-regulation, social interaction, temperament, uniqueness								
Demographics: age, sex, family composition (parents, guardians, siblings, etc.)								
Developmental/learning history: learning preference/style, milestone accomplishments, needs for specific structure or cues, play, summary of previous assessment results								
History of concerns: how family's concern/question developed, duration of concern, situations in which concern is displayed								
Physical status: appearance, birth history, growth, health status, hearing and vision, medical history, medicines, nutrition and eating								
Typical day: activities and routines, coping with routines and change in routines, opportunities to interact with age peers and learning activities								
Special circumstances: extended hospital stays, medical diagnoses, impact of medical conditions on routines, current/previous program eligibility/participation								
Family's Information								
Family history: family routines, occupational information, significant medical history, length of time in the community, where the family lived previously								
Family resources: child care, community programs, early intervention participation, extended family, Head Start								
Special Circumstances								
Cultural/language differences: picture of language in the home, translation needs, language dominance, acculturation, family values/beliefs								
Economic issues: housing or other financial hardships that the family believes is important to include								

Area: Background Information -- Content Indicators, cont.	Report One				Report Two			
<b>Special Circumstances, cont.</b>	strength	needs change	missing	not needed	strength	needs change	missing	not needed
Environmental issues: custody, foster care, high mobility, social service monitoring that do affect the family's participation or child's performance								
<b>Assessment Purposes</b>								
Family concerns: concerns about the child, the progress of intervention, daily participation in activities								
Family questions: questions about the child's skills or abilities, progress in therapy or intervention, the child's needs								
Family priorities: goals and dreams the family has for the child, priorities about intervention or therapy, priorities concerning schedules								
Referral or progress questions: questions from teachers, daycare providers, or other program personnel; questions from other agencies (e.g., doctors, social workers, insurance personnel); questions resulting from additional assessment requests								

Area: Background Information -- Quality Enhancement	Report One		Report Two	
<b>This section of the report avoids:</b>	strength	needs change	strength	needs change
Duplications: information that is current to this report by restating purposes, reporting information acquired during assessment process, stating interpretations, or providing recommendations				
Other histories: information that addresses other people's background (e.g., training or experience of this child's daycare providers, assessor's experiences in building rapport)				
Speculations: causes, rumors, statements regarding how life history contributed to problems, family's reluctance to share information, opinions about family's acceptance of disability				

Area: Background Information -- Quality Enhancement, cont.	Report One		Report Two	
This section of the report includes:	strength	needs change	strength	needs change
Items that personalize the history; e.g., child's favorite toy, food, routine				
Information on family's joys, pleasures, and hopes for child				
Information on assessors' initial contact				
As a whole, this section of the report:				
Provides a beginning portrait of this child				
Reflects what this family believes is important				
Reflects family's chosen level of participation in report preparation				
Includes information that is helpful in understanding the report				
Includes a level of detail consistent with the purposes of the report without redundancy				
Reports information carefully, factually, with minimal technical terms				
Shows cross-audience appeal				
Avoids impersonal tone				

SELF-ASSESSMENT SUMMARY FOR BACKGROUND INFORMATION

[List potential elements to change. Select one element to work on. Mark selection by entering the date.]

Area: Procedures and Tools -- Content Indicators	Report One				Report Two			
<b>Information Gathering</b>	strength	needs change	missing	not needed	strength	needs change	missing	not needed
Description of tools: [answer for each item listed] names of published tools ..... brief description of unpublished tools ..... identification of all sources of information ..... shows how purposes are related to choices of procedures & tools .....								
Procedures: [answer for each item listed] team members and their roles, including the family's chosen role ..... situational circumstances including where, when, how long, how often, and persons present ..... unusual circumstances that might affect findings and interpretations .....								
General accommodations: descriptions of methods used to address child's unique characteristics and needs including [answer for each item listed] adaptive strategies (e.g., response modes, breaks, etc)..... alterations to any standardized procedure ..... cultural considerations ..... interpreters or translations needed ..... language used in assessment ..... rapport-building procedures .....								
<b>Disclosures That May Be Required by Program or by Law/regulation</b>								
Compliance with statutes and regulations regarding nondiscriminatory testing								
Description of the extent to which assessment varied from standard conditions								
Basis for making learning disability determination								
Reference to professional standards for assessing CLD diverse children								

Area: Procedures and Tools -- Quality Enhancement	Report One		Report Two	
<b>This section of the report avoids:</b>	strength	needs change	strength	needs change
Assessment results: test scores, observation data, interview information, details on the findings regarding language dominance; details on the findings regarding dynamic assessment of adaptive strategies				
Irrelevant detail: excessive detail on the assessment setting, psychometric properties of tests, technical description or exhaustive listing of what a test measures				
<b>This section of the report includes:</b>				
Describing tools used across team members first, followed by tools addressing particular concerns				
Using bullets that link information in place of narrative (e.g., Preschool Language Scale—Spanish Ed., taped language sample—home 30 min, daycare 30 min)				
Using a table format (e.g., purpose, tools, and circumstances)				
<b>As a whole, this section of the report:</b>				
Shows how the tools are related to the purposes of assessment				
Connects the procedures to the unique needs of this child				
Shows how this family participated in collecting the information				
Helps the reader understand how the information was gathered				
Avoids unexplained technical terms and impersonal tone				
Shows cross-audience appeal				

SELF-ASSESSMENT SUMMARY FOR PROCEDURES AND TOOLS

[List potential elements to change. Select one element to work on. Mark selection by entering the date.]

Area: Findings -- Content Indicators	Report One				Report Two			
<b>Child's Developmental and Functional Abilities</b>	strength	needs change	missing	not needed	strength	needs change	missing	not needed
Concrete comparisons: current to previous performance, specific examples of what is typical or what would be expected next; test scores reported as range with explanation of the meaning and examples of skills present								
Integrated developmental description: all areas of concern (family questions, report purposes), progress in areas no longer of concern, specific examples illustrating skill or ability, focus on strengths and needs, influence of difficulties in one developmental area on performance in another area								
Family and professional interpretations: how child attends, plays with peers and toys, reacts in structured vs. unstructured situations; quality and representativeness of child's responses								
Limitations of evaluation/assessment: problems the assessment team experienced in establishing and maintaining rapport, obtaining an adequate sample of skills and behaviors, accommodating the child's unique cultural, linguistic, or response capacities								
<b>Related Considerations That Affect this Child's Performance</b>								
Cultural/linguistic differences: culturally-linked developmental expectations, exposure to learning activities, materials, and play experiences; family-child interaction styles; linguistic skills and proficiency in first and second language; language use and exposure across natural settings and conversational partners								
Environmental factors: adult expectations, environmental supports (instruction, routines, schedules, structure), and physical layout								
Family context (at family's discretion): unique knowledge, resources, and experiences that enhance development; self-identified needs for information and support; beliefs, preferences, and values regarding child-rearing, development, learning								
Health/sensory capacities: interaction of health, medical conditions, medicines and developmental performance								
Personality: interaction of coping style, learning style, likes and dislikes, state, temperament and developmental performance								

Area: Findings -- Quality Enhancement	Report One		Report Two	
This section of the report avoids:	strength	needs change	strength	needs change
Decontextualized information: test scores without appropriate explanation and examples, information that is organized by test or by who administered the assessment instead of by family concerns or developmental areas				
Duplications: information that duplicates what appears in background, procedures, or recommendations				
Speculations: theories about cause, rumors, long-range predictions, interpretations not grounded in data				
This section of the report includes:				
Specific examples to illustrate performance				
Clear, direct statements to relate findings to family concerns				
Integration of information from different tools to describe and interpret performance				
Comparisons to previous performance				
As a whole, this section of the report:				
Answers the family's questions and concerns				
Directly relates to the assessment purposes				
Provide a balanced portrait of this child				
Reflects family's chosen level of participation in report preparation				
Avoids unexplained technical terms and impersonal tone				

SELF-ASSESSMENT SUMMARY FOR FINDINGS

[List potential elements to change. Select one element to work on. Mark selection by entering the date.]

Area: Conclusions and Next Steps -- Content Indicators	Report One				Report Two			
<b>Understanding the Child's Strengths and Needs</b>	strength	needs change	missing	not needed	strength	needs change	missing	not needed
Child performance: [answer for each item listed] comments addressing consistent patterns ..... relationship of patterns to characteristics/circumstances .... relationship of patterns to environmental demands ..... scaffolding approaches that supported performance ..... comments relating patterns to questions arising from previous IEPs, IFSPs, or service provider concerns .....								
Family priorities: [answer for each item listed] comments relating to family concerns, questions, and priorities ..... explanations of any diagnostic information ..... family's interpretations of child's pattern of strengths and needs .....								
Other consumers' needs: [answer for each item listed] explanation accompanies diagnosed health or medical conditions ..... eligibility recommendations accompanied by explanation of child's level of functioning in relation to meeting criteria for categories of eligibility ..... appendices for reporting to agencies that require test scores or diagnostic labels (e.g., SSI, DD Waiver).....								
<b>Next Steps for Promoting Optimal Development</b>								
At home activities: concrete suggestions tailored to the family -- address family priorities, build on family suggestions and ideas, are sensitive to family routines, culture, and community; manageable given family's interests and preferences								
Intervention suggestions: recommendations with specific examples that provide a starting place for developing IEP goals and IFSP outcomes, creating domain-specific instructional activities, integrating intervention within natural environments/naturally occurring events, incorporating special considerations into instructional programs								
Services that might be helpful: additional assessments to clarify unresolved questions, follow-up with family pediatrician, programs families might consider, specific services; clear linkages between service recommendations and outcomes for the child and family								

Area: Conclusions and Next Steps -- Quality Enhancement	Report One		Report Two	
This section of the report avoids:	strength	needs change	strength	needs change
Conclusive determinations about eligibility: unilateral statements about eligibility or declarations that child qualifies for early intervention or special education, statements about meeting eligibility criteria that are not based on data				
Inappropriate conclusions: interpretations that are not supported by information presented in the report, long- range theorizing or prognoses; opinions of others who are not part of the team unless clearly stated; scores or rankings				
Insensitive suggestions: recommendations that are impractical, expensive, or uncomfortable for families; suggestions that require large time commitments or are overwhelming in number; generic (canned) suggestions; broad or vague suggestions that cannot be translated to ordinary activities				
Labeling: diagnosis (when that is part of the assessment) that labels a health, medical or physical condition without explanation of the underlying difficulties unique to the child or the relationship to child's learning and development				
Overly-prescribed recommendations: recommendations for a specific program, curriculum, or person; listing of services without reference to activities related to child needs; suggestions that are so narrow that they only apply to one situation				
This section of the report includes:				
Description of relationships and patterns across different assessment strategies, times, persons				
Personal information about the child; restatement of family's goals, wishes, dreams				
Recommendations that cross settings or cross disciplines				
Several (not many) carefully chosen, good examples				
As a whole, this section of the report:				
Provides an overall interpretation of this child's strengths and needs				
Relates conclusions to the family's questions and concerns and assessment purposes				
Directly relates to the assessment purposes				
Reflects family's chosen level of participation in report preparation				
Is helpful in guiding program planning and service access				

Area: Conclusions and Next Steps -- Quality Enhancement, cont.	Report One		Report Two	
<b>As a whole, this section of the report, cont:</b>	strength	needs change	strength	needs change
Avoids unexplained technical terms and impersonal tone				
Includes a level of detail consistent with the purposes of the report without redundancy				
Shows cross-audience appeal				

SELF-ASSESSMENT SUMMARY FOR CONCLUSIONS AND NEXT STEPS

[List potential elements to change. Select one element to work on. Mark selection by entering the date.]

ADDENDUM ON WRITING STYLE

NOTE: This addendum to the self-assessment is provided for individuals who want to focus on writing style. Ratings for this section need to be based on the report as a whole, not just specific sections. Use the same procedure of rating two reports against the listed criteria.

Area: Report Writing Style	Report One		Report Two	
<b>Organization [answer for each item listed]</b>	strength	needs change	strength	needs change
uses headings and subheadings ..... arranges headings in a logical order ..... organizes by developmental areas ..... connects information to family concerns within developmental area ..... integrates information within developmental areas from multiple sources ..... organizes within developmental areas by strengths and then needs ..... organizes within strengths and needs by general statements and specific examples ..... separates clearly interpretations from recommendations .....				
<b>Page Layout [answer for each item listed]</b>				
uses a font that is easy to read ..... separates sections with extra spacing .....				
<b>Words and Phrases to Convey the Message [answer for each item listed]</b>				
uses clearly worded statements ..... edited for appropriate grammatical structure, punctuation, spelling, proofing ..... explains needed technical terms ..... uses lean, non-repetitious wording ..... uses positively worded statements .....				
Audience: [answer for each item listed] controls readability ..... enables consumer to understand the strengths and the delays ..... shows cross reader appeal .....				

Area: Report Writing Style, cont.	Report One		Report Two	
<b>Strategies That Can Enhance Tone</b>				
Family friendly: [answer for each item listed] depicts family as team member ..... includes family input or reference throughout ..... relates information to family's culture, routines, community, preferences ..... presents information in a manner that is not overwhelming ..... tailors composition to reflect family's individual needs and experience .....				
Team member references: [answer for each item listed] choices in how to refer to team members are governed by equity and respect ..... clarifies the relationship between person named and the child ..... uses each member's preference for depicting name and title ..... uses an appropriate noun/pronoun connection ..... is consistent in references throughout the report ..... provides first and last names to meet translation needs regarding gender .....				
Style: [answer for each item listed] avoids unneeded technical terms/jargon ..... avoids clinical tone (distancing or depersonalizing phrases) ..... uses endearing terms (sweet, friendly) cautiously ..... uses words instead of acronyms ..... strives for first person, active voice, and consistent tense .....				

**SELF-ASSESSMENT SUMMARY FOR WRITING STYLE**

[List potential elements to change. Select one element to work on. Mark selection by entering the date.]

## ENVIRONMENTAL SUPPORT FOR REPORT WRITING

For each area below, circle the box that most closely resembles your estimate of support available in your setting.

SUPPORT AREA	LEVEL OF SUPPORT				
	least				most
Q1: Philosophy [shared beliefs about what is a good report]	never mentioned or none	shared orally on hiring	written philosophy statement(s)	informal discussions among staff on philosophy	staff development on philosophy
Q2: Report writing policies and procedures	never mentioned or none	oral feedback following report	written feedback following report	report model provided	written guidelines and rules provided
Q3: Assessment instruments for children	no devices are used	one specific device is required	several specific devices are required	one required device with additional options encouraged	no specific device requirement but many options
Q4: Assessment instruments for families	no devices are used	one specific device is required	several specific devices are required	one required device with additional options encouraged	no specific device requirement but many options
Q5: Orientation to writing reports	Unidisciplinary- one person does it all	multidisciplinary- each does own, clipped together	interdisciplinary- team discusses, each does own, clipped together	interdisciplinary- team discusses, each does own, one person integrates	transdisciplinary- jointly write report as a team
Q6: Software for report production	program does not provide; I use my own	program software is unreliable; adds time to report writing	reliable but inflexible software; no freedom to individualize	flexible but limited software; allows choice in formats	software choices; flexible in format, content, phrasing
Q7: Hardware for report production	program does not provide; I use my own	program hardware is dated and unreliable	access to reliable hardware limited by location, number of users	easy access to fixed location hardware that is reliable	access to portable hardware (e.g., laptop)
Q8: Access to colleagues for consultation	colleagues seem uninterested	colleagues have interest; impossible to meet with them	meetings are possible but scheduling is difficult	we meet to consult but not as frequently as I would like	access is ongoing and a major support for report writing

SUPPORT AREA	LEVEL OF SUPPORT				
	least				most
Q9: Time allocated for report writing	I write on my own time	I have to work it into my other duties	writing time built into the day or week schedule	released from my other duties	released from duties and substitute takes over
Q10: Access to information to aid report writing	only to my own material	current oral reports of others	current written reports of others	current written reports and raw assessment data of others	complete access to all (current and past) information on site
Q11: Family role in report writing	family receives finished product	family suggests areas to cover	family helps construct report outline	family edits the draft before final production	family composes and edits

## Completing the INDIVIDUAL CHANGE PLAN FOR REPORT WRITING

Develop a plan for improving report-writing practice based on indicators that you judge necessary and appropriate for your site. This step may include plans for changes in report content (Background Information, Procedures and Tools, Findings, or Conclusions and Next Steps) or to the report's Structure and Composition.

This step may include plans for monitoring change and additional self-evaluations of your reports. Change plans should be simple constructions, involving a goal, several activities to meet the goal, and a way to evaluate progress toward the goal.

1. Indicate the area (e.g., background information, findings, composition) you intend to work on; then, briefly summarize at the top of the change plan the aspect of report writing that you identified for change through your self-assessment;
2. List three actions you could take to move toward accomplishing your goal for change;
3. Briefly note time frame for accomplishing your change and any resources (human or material) you might need to complete the change;
4. Note any potential barriers in the bottom section of the plan.

## INDIVIDUAL CHANGE PLAN FOR REPORT WRITING

<b>Area:</b>		<b>Date:</b>
<b>What element of this strand do you want to change?</b>		
<b>Plan of Action</b>  <b>Step 1:</b>  <b>Step 2:</b>  <b>Step 3:</b>	<b>Timeline</b>	<b>Resources</b>
<b>Barriers [list potential barriers to the change process]</b>		
<b>Date Accomplished:</b>		