

Providing Quality, Appropriate Written Individualized Assistance Checklist



Policy/Practice	Developed?	Implemented?
Parent Center has a policy governing the provision of written individualized assistance that includes training, supervision, monitoring.		
Parent Center has a policy prohibiting the unauthorized practice of law that includes training, supervision, and monitoring.		
Parent Center has a training for all new staff and volunteers who work with families on appropriate written individualized assistance.		
Parent Center has a training for all new staff and volunteers who work with families on avoiding the unauthorized practice of law.		
Parent Center has a training for all staff who work with families on appropriate written assistance that is provided on a regular schedule.		
Parent Center has a training for all staff who work with families on avoiding the UPL that is provided on a regular schedule.		
Parent Center has assigned knowledgeable supervisory staff who supervise and monitor the provision of written individualized assistance.		
Parent Center reviews parent feedback about written individualized assistance for quality assurance purposes.		
Parent Center makes policy, training, and practice corrections when results of parent feedback indicate quality concerns.		



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Parent Center has a confidentiality policy that governs when copies of written assistance can be/are provided to external parties.		
Parent Center trains all new staff and periodically retrains staff on the confidentiality policy.		

Policy/Practice	Developed?	Implemented?
Parent Center has an identified managerial or supervisory staff person responsible for responding to subpoenas or requests for information.		
Parent Center has a policy governing how information is entered into its Contact Management System (CMS)/data tracking system (DTS).		
Parent Center trains all new staff and periodically retrains staff on the policy governing information entry into the CMS/DTS.		
Parent Center has an identified managerial or supervisory staff person responsible for periodically reviewing information in the CMS/DTS.		
Parent Center has developed, or has access to, high quality materials such as FAQs, fact sheets, and guides, to limit need for written TA.		



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Parent Center has a procedure to periodically engage staff and volunteers who provide assistance to families regarding appropriate TA.		
Parent Center has a procedure to periodically engage staff and volunteers who provide assistance to families regarding UPL.		
Parent Center has written guidance on the expected roles of staff/volunteers in supporting parents in person, on the phone, and/or in writing.		

Areas for Improvement

Identify each question for which the Parent Center does not have a policy/procedure/practice developed or implemented. Prioritize and develop a timeline to create and/or implement each identified policy/procedure/practice on the next page.

Please list the required policy/practice/procedure in priority order below and identify your timeline for development and implementation of each policy/practice/procedure.

Policy/Practice	To be developed by:	To be implemented by:



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NOTE: Consider having staff with different roles complete the self-assessment to identify extent of staff knowledge about the existence and implementation of written guidance on these topics. Also, set a schedule to periodically revisit the Self-Assessment.