



Child Find ACCESS Model Guide

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Acknowledgments

The Child Find ACCESS project team extends our sincere thanks to the state and community leaders who helped us develop and refine the Child Find ACCESS model. Your dedication to ensuring that all infants and toddlers and their families have access to early intervention and other supports is truly inspiring. Special thanks to the families who lent their voices to the project by serving on leadership teams or participating in interviews. Your perspectives were integral to shaping the work in each community and the Child Find ACCESS model as a whole.

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Contents

About This Guide	1
Implementing the Child Find ACCESS Model.....	1
Phase 1: Convene	3
Establish the Leadership Team	3
Determine a Meeting Schedule	5
Document Norms for Team Collaboration	6
Establish a Vision Statement	7
Phase 2: Explore	8
What Data Does the Leadership Team Need?.....	9
Review and Discuss Available EI Program Data.....	10
Collect and Review Data from Other Sources.....	11
Map the Child Find System Using the Child Find Self-Assessment.....	12
Identify Challenges in the Child Find System	13
Determine Root Causes of Challenges	13
Phase 3: Design	15
Brainstorm Strategies to Address Root Causes	15
Prioritize Strategies to Implement.....	16

Develop an Action Plan.....	17
Phase 4: Prepare.....	18
Develop or Obtain Materials to Support Implementation of Strategies	18
Plan for Collecting and Reviewing Data Related to the Strategies	19
Train Staff and Partners (as Applicable).....	19
Phase 5: Use and Refine	20
Carry Out the Action Plan	20
Monitor Improvement Strategies.....	20
Refine the Action Plan or Strategies as Needed	21
Phase 6: Sustain	22
Monitor Data on Intended Outcomes and Strategies	22
Address New Challenges and Extend Successful Strategies	23
Plan for Continuous Quality Improvement and Evaluation	23
Resources	24

About This Guide

This guide provides instructions and considerations for local and state early intervention (EI) leaders implementing the evidence-based Child Find ACCESS model to improve their child find system. For information on the model's background and why teams may choose to use it, please review the [Introduction to Child Find ACCESS](#) resource.

Every community is different, so flexibility is built into the model and reflected in this guide. As content experts, your community's leadership team will determine what issues to address, how to address them, and who should be involved. You can and should adapt the model to meet the needs of your community.

The audience for this guide is EI staff and other system partners engaging in the child find system improvement process.

The Implementation Checklist is a companion resource to this guide. Leadership teams use the checklist at regular intervals to pause, recognize progress, and identify priorities for next steps. The checklist includes progress markers, guidance, and considerations for each model component.

We recommend reviewing the checklist when starting the work and completing it at least once during each phase and additionally when there are meaningful changes in team membership, strategies, or local conditions.

The Implementation Checklist is available at this [link](#).

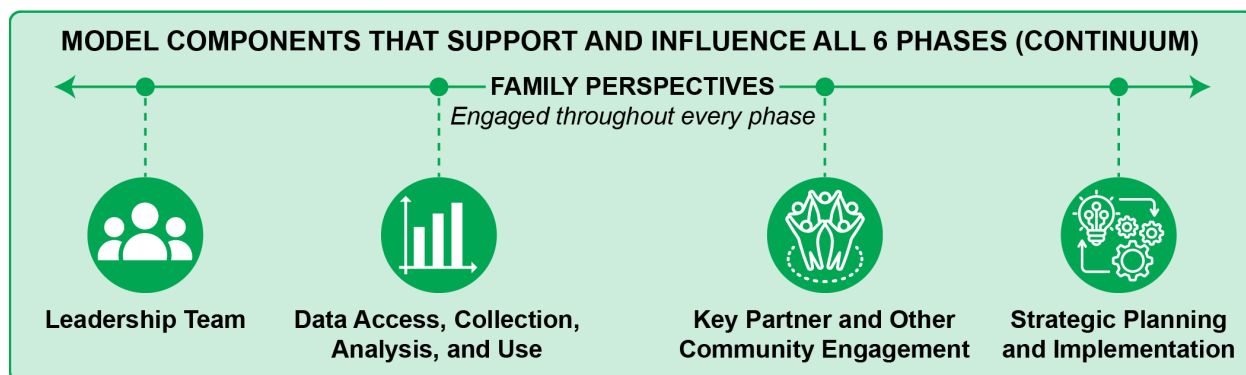
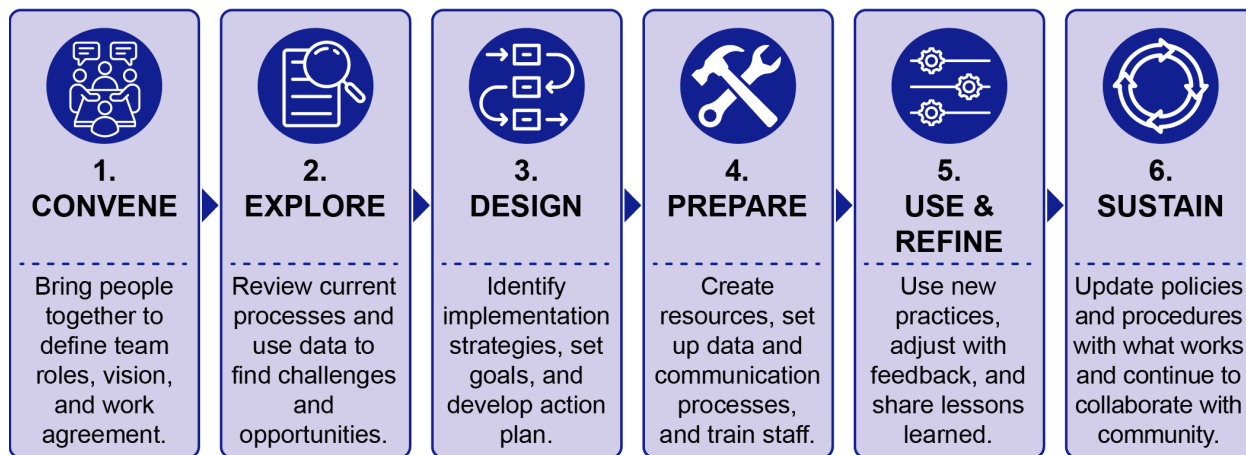
Implementing the Child Find ACCESS Model

The model framework includes five components: Leadership Team; Data Access, Collection, Analysis, and Use; Key Partner and Other Community Engagement; Strategic Planning and Implementation; and Family Perspectives, which is embedded across the other four components. The model is implemented in six phases: Convene, Explore, Design, Prepare, Use and Refine, and Sustain. The five components operating across the six implementation phases make up the evidence-based model for sustainably improving child find systems.

The graphic below is an overview of what happens in each phase. Resources, templates, and examples are included throughout to support teams in carrying out the activities.



A 6-phase process guided by strong partnerships and community engagement



WORKING TOGETHER

This process is most effective when guided by collaboration, shared data, and a commitment to continuous improvement.

Phase 1: Convene

The *Convene* phase brings together a varied group of partners to establish the foundation for collaboration, shared vision, and effective implementation of the Child Find ACCESS model. This phase involves EI staff identifying and engaging key partners—such as families, service agencies, referral organizations, and other family-serving organizations—and clarifying how each will contribute. Some key partners will serve on the leadership team, actively shaping strategy and decision-making, while others will provide input periodically or assist with outreach and data collection. Early in this phase, the group should define team roles, create a shared vision, and establish agreements on how the work will be carried out, while allowing for these to evolve as new perspectives, data, and goals emerge.

Convene: Guiding Questions

- Who should be part of the leadership team, and who should be engaged periodically for feedback or support?
- How will this group align and coordinate with other groups or embed into existing groups?
- How often will we meet, in what format, and for how long?
- What agreements and ways of working will guide our collaboration, and how will we revisit this over time?
- What is our vision related to child find/early identification that will guide our work?

Convene – Key Activities:

- ☐ Establish the leadership team
- ☐ Determine a meeting schedule
- ☐ Document norms for team collaboration
- ☐ Establish a vision statement

Establish the Leadership Team

The first step in implementing the Child Find ACCESS model is to establish the leadership team. The leadership team examines the local child find system and design and implement or oversee implementation of improvements. The team meets regularly as a group and coordinate with others within their home organizations and the community as needed.

The leadership team should include representatives from the EI program, primary referral sources such as families and health care providers, and other individuals and organizations that regularly engage with young families. Some leadership team members may play a role in helping families access EI and other services, and other members may work in broader areas such as literacy initiatives or support for early care and education programs. Together, the leadership team members contribute to a shared understanding of local child find practices, barriers, and opportunities and drive the work to improve access to and uptake of EI services.

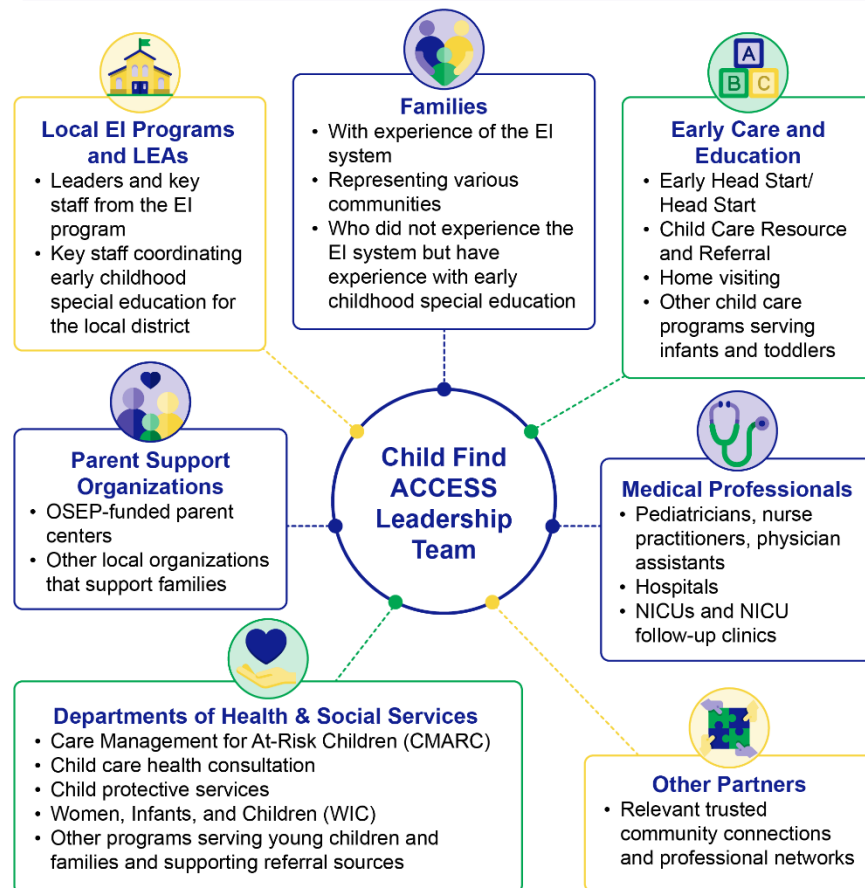
The graphic below can help you identify key organizations, roles, and individuals to consider for the leadership team. These recommendations are based on common family touchpoints throughout the EI and referral process. While a useful starting point, the list is not exhaustive. Each community has its own dynamics and partners to consider. Smaller communities may benefit from collaborating with adjacent communities to work together and pool resources when organizations represented on the leadership team serve more than one community. As you begin this work, you may identify additional voices that should be engaged, either as part of the leadership team or in other ways such as outreach or feedback activities.



A SEAT AT THE TABLE

Key Partners to Include on the Leadership Team

To effectively implement the Child Find ACCESS model, it's important to include on the leadership team the individuals who support and are in contact with primary referral sources. These individuals may represent or be connected to local early intervention (EI) programs and local education agencies (LEAs), early care and education programs, parent support organizations, medical professionals, other health and social services programs, and families. In the process of building the leadership team, it's important to keep asking the question, who else might be in contact with parents and families that have children birth through age 3? And how can we bring them to the table?



Determine a Meeting Schedule

Leadership team: Determine whether you can accomplish this work through existing cross-sector groups and their meetings or whether you need to form a separate team meeting. Groups for collaboration could include a subcommittee of a state or local Interagency Coordinating Council or early childhood advisory committee. If the leadership team meets separately from existing groups, determine the initial meeting frequency and length. Some teams schedule monthly 1.5-hour meetings and then adjust the schedule or duration as needed. Determine who will facilitate the meetings; consider co-facilitators, rotating facilitators, or facilitators for different parts of each meeting.

Family participation: As you work out the leadership team's meeting schedule, consider whether family members might prefer to meet as a separate group to discuss issues/ideas and provide input back to the leadership team. This option can give families flexibility in when they meet and can support deeper connections among family members.

However, it is important to ensure a productive feedback loop between a separate family group and the leadership team so that family insights are meaningfully incorporated throughout the work.

Meeting agendas: When designing the agenda for the first meeting, consider how well leadership team members already know one another and work together, whether they are aware of federal child find requirements, and how knowledgeable they are about local child find



TIPS FOR GETTING STARTED WITH THE LEADERSHIP TEAM



REVIEW THE A SEAT AT THE TABLE INFOGRAPHIC

Use it as a checklist to identify key organizations and individuals who interact with families in your community.



INVITE KEY PARTNERS

Reach out to leaders, staff, and other individuals who can represent these organizations and who have different perspectives on how families access EI services.

It is important to identify a "sweet spot" for the number of partners who will be serving on the leadership team. The team should be big enough to cover a range of systems families interact with, but also small enough to manage scheduling and participation.



PREPARE ONBOARDING INFORMATION

Compile data on the current child find system, how it operates, and who is involved. This overview will give leadership team members a shared understanding and common language about the child find system.



SET YOUR FIRST MEETING

Provide an overview of the phased approach and purpose of the leadership team. Review onboarding information to begin building a shared understanding of what is working and what isn't.



CLARIFY ROLES

During the initial meetings, define how the team will work together, how often you will meet, and how decisions will be made.



A well-prepared start leads to a collaborative, effective leadership team and a stronger child find system.



data. Then consider including the following items on the agenda to ensure team members have a shared understanding of the local child find system and the planned work:

- Member introductions (name, agency, role, how their/their agency's work intersects with the local child find system)
- Child find definition, federal requirements for implementation, and federal requirements for reporting
- Overview of the phases of the Child Find ACCESS model and the proposed timeline for the leadership team's work (review of the team's progress and upcoming work will be a recurring agenda item)
- Onboarding overview of the local child find system, including local child find data (local child find data will be a recurring agenda item)

Depending on meeting length and frequency, you may need to split these initial items over more than one meeting, and some items (marked as recurring) should be included in successive meeting agendas. The next two sections (document norms and establish a vision statement) could be folded into the first meeting or included on one of the first few meeting agendas, depending on how much time is needed for the above items.

Communication with state leaders: For local or regional leadership teams, consider how you might share information about leadership team progress and needs with state- or system-level leaders. Keeping these leaders in the loop can help them see where they might direct resources to address child find needs across the state.

Document Norms for Team Collaboration

As the leadership team convenes, discuss and decide as a group how the work will be carried out. Document your decisions; these are sometimes referred to as Terms of Reference. Typical Terms of Reference address the purpose, scope, and timeline of the work, as well as roles and responsibilities of leadership team members. To facilitate ongoing progress, consider including in your leadership team's Terms of Reference decisions about:

- A virtual shared workspace or other strategies to facilitate collaboration
- Expectations for work between meetings (or an agreement on how to make progress if the option to work between meetings is limited)
- The decision-making process (consensus, majority, other)
- How discussions and decisions in each meeting will be documented
- How members will be updated if they miss a meeting

Some teams include ground rules in their Terms of Reference, particularly when convening a group of people who do not usually collaborate. Ground rules address the relational aspects of group collaboration. Common ground rules include, for example, agreeing to:

- Come to each meeting prepared to do the work
- Not interrupt each other
- Assume positive intent of each member
- Contribute to a positive, productive atmosphere
- Share relevant progress and seek relevant input from constituents
- Include the ground rules that resonate most for your team, and revisit and adjust the ground rules as needed to support productive collaboration.

Establish a Vision Statement

Early on, the leadership team should collaborate to create, refine, and finalize the overarching goals for your work together in a vision statement. Create opportunities for team members to brainstorm by responding to a series of prompts—such as by using a virtual or physical whiteboard and sticky notes or another way that allows members to record their ideas and build on others'. You can use these example prompts or create your own:

- What are your hopes and dreams for local families of infants and toddlers with disabilities?
- What issues in your community might impact (support or limit) families in terms of knowing about, accessing, or enrolling in EI services for their infants and toddlers?
- What are your community's strengths in terms of access to and uptake of services for families of infants and toddlers with disabilities?
- What do you think the purpose of this leadership team should be (broad or specific)?

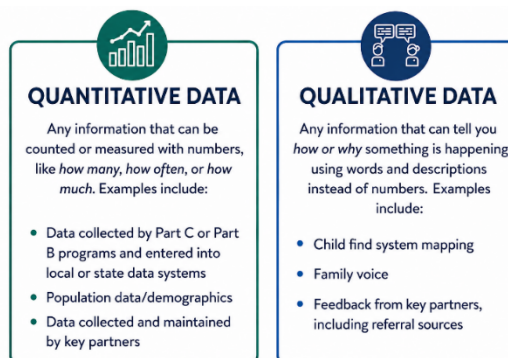
If the team is small, you may be able to combine the ideas and create a vision statement in one meeting. For larger teams, consider nominating a member (or allowing the meeting facilitator or coordinator to own this task) to draft a few options for the vision statement and bring them back for group discussion, iteration, and consensus.

Once you have a vision statement, return to it often to remind the team of the direction it wants to go and to check if improvement strategies are likely to move the team toward its vision. As you undertake the work, you may need to adjust the vision statement—just keep track of any changes and use the vision statement to guide the process.

Phase 2: Explore

The *Explore* phase builds a shared understanding of how the local child find system currently functions, where challenges and opportunities exist, and what assets can support change. This phase begins with the leadership team reviewing available data—both **quantitative and qualitative** (see graphic for definitions)—collected from a variety of partners and entry points into the system. Examples include data collected by EI or early childhood special education (ECSE) programs or other partners, child find system mapping, or direct feedback from partners or families (see graphic for more examples). This audit of available data should reveal patterns and trends as well as surface assumptions about what is and is not working, helping to confirm or challenge existing beliefs.

During this phase, you may find it important to engage additional partners in interpreting the data. Doing so could help foster partner buy-in, collaborative problem-solving, and a greater awareness of underlying issues. This shared evidence base guides the next phases of implementation as you revisit updated data and collect additional data to examine progress.



Explore: Guiding Questions

- What data—both qualitative and quantitative—do we already have, and what additional information do we need?
- What patterns, strengths, challenges, and gaps do we see in the data?
- What is the challenge(s)? What does it look like, who is experiencing it, and where is it happening?
- Why is it happening? What are the root causes?
- What else does the leadership team need to know to inform action?

Explore: Key Activities

- ☐ Review and discuss available early intervention program data
- ☐ Collect and review data from other sources
- ☐ Map the child find system using the Child Find Self-Assessment
- ☐ Identify challenges in the child find system
- ☐ Determine root causes of challenges

What Data Does the Leadership Team Need?

In each phase of implementation, the leadership team uses data to inform their work. The table below summarizes how the leadership team uses data in each phase and what data they need. For more information, visit the [Engaging Communities in Analyzing Data for Child Find Improvements](#) blog post.

Phases	Data Use and Needs
Convene & Explore	The leadership team uses data to understand the current status of the child find system, including strengths and areas of need. The team needs: • Basic information about the child find system to help everyone understand the context of the work they are undertaking ○ Who is involved ○ How it operates • Available data on referrals to identify challenges and opportunities and recognize assets that support change ○ Administrative data from the EI program ○ Administrative and qualitative data from key referral partners • Additional data from other relevant sources, including data about the local population
Design & Prepare	The leadership team plans how they will collect and use data in subsequent phases. The team establishes clear and efficient processes for collecting, managing, and sharing data to track progress and guide decision-making. The team identifies the types of data needed to assess whether implemented strategies are working as intended and determine if collection methods are realistic given the capacity of leadership team members and child find partners. The team needs data that provide information about how improvement strategies are being implemented (are they being implemented as intended?) and about the effects of those strategies (are they making a difference?).
Use and Refine & Sustain	The leadership team uses processes established in earlier phases to collect and analyze data to assess and provide timely feedback on the implementation and effectiveness of improvement strategies to drive continuous improvement. The team engages in cycles of action, reflection, and adjustment and adjusts strategies, data collection, and analysis practices as needed. Specific data needs depend on the team's data collection/analysis plan. Broadly, to assess the implementation and effects of its strategies, the team needs: • Implementation data on each improvement strategy or activity (what has been done, by whom, where or with whom; what is in progress and where) • Evaluation data, such as feedback from implementers, feedback from members of the target audience of strategies, and feedback from key partners on how effectively the strategies address the intended issues

Phases	Data Use and Needs
	Administrative child find data to assess whether improvement strategies are having the intended impact on the issues that emerged in Phases 1 and 2

In this data-driven decision-making process, the leadership team has different data needs in each phase—from data that help the team pinpoint challenges to data that demonstrate how effective the strategies are. The sections below provide additional detail about how the leadership team uses data in each phase, with examples of data the team may review or collect in each implementation phase.

Review and Discuss Available EI Program Data

To get started with the Explore phase, identify available data on the local child find system, such as:

- Number of children referred
- Number of children evaluated
- Number of children enrolled
- Referral source
- Child/family demographics
- Reason for concern
- Number of families unable to contact
- Evaluation outcome
 - Number of children evaluated
 - Number of children found eligible/ineligible
 - Number of children enrolled
 - Number of families declining evaluation
 - Number of families declining enrollment (although found eligible)
 - Number of families unable to contact

Additional data points may also be available. As you look across your data inventory, think about the questions you can answer and the questions you'd like to answer with the data. For example, start by looking at the percentage of referred children who are enrolled. Are you curious about which referral sources are more likely to result in enrollment? You could look at

referral sources by enrollment. Or you could broaden your view and look at what happened with the referrals for each referral source.

In Excel, you can run pivot tables to analyze and view the data in these ways. Use data visualizations to present the data in clear, engaging, comprehensible ways that promote understanding and discussion. The Center for IDEA Early Childhood Data Systems (DaSy) has an excellent tutorial series on [using pivot tables](#) and a toolkit for [data visualization](#).

Carefully document how you analyze the data and bring the initial results to the leadership team for review and discussion. As you walk through and explain the data to the leadership team, document the issues that the team identifies. Consider including prompts for each data set or data visualization (e.g., chart, pivot table) that you review. For example: What do the data suggest about aspects of the child find system that are working well? What pain points emerge, and are they associated with certain referral sources, geographic locations, or family demographics?

In discussing the data with the leadership team, you may find that additional data or analyses would be helpful to answer the team's questions. Continue to conduct analyses to answer emerging questions and reach out to other sources for data as needed (see next section).

Collect and Review Data from Other Sources

Partner organizations represented on the leadership team are likely to have data that could help answer the team's questions. These organizations may have data on their own outreach about EI to families participating in their programs, screening events held in the community, or other activities to help identify and potentially connect children and families to EI services. As you bring together data from different sources, consider the similarities and differences across data sets. Take care when using data from different time periods or populations to understand concerns that come up in other data sets.

Family Stories

Hearing directly from families who have experienced the child find system, whether they have participated in EI or not, can provide valuable insight for the leadership team. The local Part B 619 (early childhood special education) coordinator or local education agency may have data on children found eligible for ECSE services who were not served under EI. They may be able to connect with families willing to share their experiences seeking services for their young children before they were eligible for the ECSE program. Or you could reach out to a local parent center or other parent group in the community to connect with families willing to share their stories individually or through listening sessions or focus groups.

If you ask families to share their experiences, work with the leadership team first to come up with questions and then test those questions with a few families before using them more widely.

During interviews or listening sessions/focus groups, carefully document the answers families provide and then look across all responses for patterns or themes that emerge. For example, several families may have had concerns early on but were not aware of the EI program before enrolling in ECSE services. You could label that theme “families unaware of EI program.” Once you identify the major themes from the family stories, check back with the families who participated, just to make sure that they agree with the themes and that you have not missed any ideas they wanted to share.

Referral Source Perspectives

Hearing directly from referral sources, such as physicians, child care providers, and social workers, also can provide insight to the leadership team and help the team avoid making assumptions about referral sources’ behavior or needs. The leadership team may decide to conduct a brief survey of referral sources about their referral practices, communication with families, awareness of the EI program and its purpose, and/or training and information needs. The team can use the information gained to understand challenges and strengths and to inform improvement strategies.

Map the Child Find System Using the Child Find Self-Assessment

Another component of the Explore phase is mapping the child find system using the Part C Child Find Self-Assessment (**CFSA**). The CFSA is a tool for documenting how the local EI program contributes to meeting the federal requirements related to child find and how the local EI program and its child find system partners implement best practices for effective child find systems. By completing the tool, the leadership team gains valuable qualitative data about the full scope of the child find system and how each partner contributes to it. The team also identifies areas of strength and areas for improvement.

First, the local EI program completes Section I of the CFSA, in which the program documents how it is meeting the requirements. Next, the leadership team uses the Part C Child Find Self-Assessment Discussion Guide (forthcoming—to be linked when available) to complete Section II of the CFSA, which is focused on child find best practices. Guidance for completing the tool is embedded in the CFSA. (*The CFSA is not currently available publicly. Please contact Margaret Gillis at margaret.gillis@sri.com to request a copy.*)

Agenda Considerations

Working through the CFSA with the leadership team will likely take multiple meetings. Consider allotting two meetings for this process while preparing for it to take just one meeting if the team is efficient in their discussions.

Identify Challenges in the Child Find System

Once the leadership team has reviewed all the data they have available and have collected, the next step is to synthesize the information and identify challenges. Begin by compiling the major child find challenges that have come up from each data source. Then work through the list with the leadership team. Look for overlaps or challenges that seem to be related. Combine these where appropriate and narrow the list to 3–5 priority challenges that seem feasible to address and within the team’s control.

Determine Root Causes of Challenges

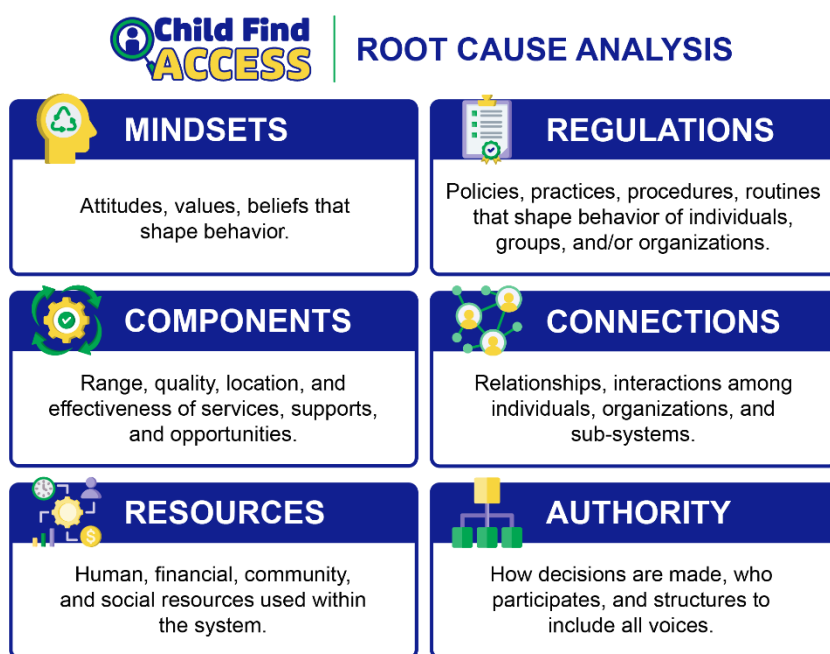
The next process in the Explore phase is to work through the foundational or root causes of each challenge using root cause analysis (RCA).

RCA is a structured problem-solving method for identifying the underlying reasons a challenge occurs. In the context of child find systems, RCA helps the leadership team uncover barriers faced by families, EI programs, health care providers and other referral sources, and other partners by drawing on multiple data sources and perspectives. By pinpointing root causes, the team can design solutions that address the problem at its source, leading to more impactful and sustainable improvements to the child find system.

Once the team agrees on 3–5 challenges in the child find system, discuss potential causes for each challenge (one at a time) across six categories: Mindsets, Regulations, Components, Connections, Resources, and Authority. The graphic above defines these six categories.

For each challenge, ask the team to brainstorm causes within these categories. Continue asking “Why is this happening?” until the team uncovers the deeper root issues.

For example, a challenge may be that pediatricians are taking a “wait and see” approach to family concerns. This challenge could arise from family stories, from the results of health care



Adapted from Michigan State University's *ABLE Change Process: Tools and resources for community systems change.*

provider surveys, and from referral data (children referred by pediatricians being older, and fewer referrals coming from some practices). In brainstorming the root cause underlying this challenge, the leadership team might conclude that some pediatricians are unaware of the EI program or unsure of its benefits for young children and families (Mindset category). Further discussion could reveal that outreach from the EI program to local pediatric practices has been inconsistent due to staffing issues or other resource allocation issues such as a lack of outreach materials or funding to replenish them (Resources category).

The team might also surmise that pediatricians are focused on medical issues in their short office visits, or that their standard practice is to reassure families about the wide variation in development for young children (Regulations category). Both of these issues could be tied back to the above issue related to a lack of understanding about the benefits of the EI program.

As this example shows, a root cause analysis can be complex. The leadership team may get to a root cause that they cannot impact, or the team may not be able to get to an underlying root cause for some challenges. Nevertheless, in many cases it is possible to identify and test possible solutions (discussed in the Design phase below).

There is no best way to document the root cause discussion. A spreadsheet may work best for you and the leadership team, or you may prefer to use a whiteboard (virtual or physical) or chart paper and sticky notes. In any case, consider displaying the definitions for all six categories (see graphic above) as you discuss each challenge and noting or tracking the underlying causes in their relevant category as you and the team identify them. Resist the urge to jump into action planning. Ideas for addressing the challenges will likely come up during this process. Document those ideas and continue working through the root cause analysis process until the team is satisfied that the underlying causes for each challenge. The forthcoming DaSy/ECTA Root Cause Analysis Tool for child find (to be linked when available) provides a comprehensive overview of how to conduct a root cause analysis, along with helpful templates.

Phase 3: Design

In the Design phase, the leadership team turns its shared vision and understanding of system challenges and related root causes into concrete improvement strategies and an actionable plan. This phase begins with identifying the desired outcomes or what the child find system should look like once the challenges and their root causes are addressed. Think about the desired outcomes related to the leadership team's overall vision. Then, work backward to determine the strategies and steps needed to achieve those outcomes. This "reverse logic" approach helps the leadership team align strategies with goals and address potential gaps or inconsistencies between the action plan and the broader vision.

Design: Guiding Questions

- What outcomes do we want to achieve, and how will we know when we have reached them?
- How can the leadership team address the root causes of why this challenge is happening?
- What strategies, activities, and action steps are necessary to reach these outcomes?
- What example strategies can the leadership team draw from?
- What existing opportunities can the leadership team build on?
- Which organizations/individuals have capacity and ability to implement?
- What input does the leadership team need, especially from families and other referral sources?
- Who will be responsible for implementing specific activities and action steps, and what will be the mechanisms for reporting progress back to the leadership team?
- How will we design these strategies to anticipate implementation challenges?

Design: Key Activities

- ☐ Brainstorm strategies to address root causes
- ☐ Prioritize strategies to implement
- ☐ Develop an action plan

Brainstorm Strategies to Address Root Causes

Begin the Design phase by facilitating a brainstorming session with the leadership team. The goal of this session is to take each challenge and its associated root cause(s) identified in Phase 2 and generate desired outcomes. For example, you may propose an outcome related to increasing pediatricians' awareness and understanding of the EI program and referral process. Although it is easy to jump right into action planning, at this stage it is important to identify solid outcomes so that you know what you are working toward with any improvement strategies.

Once the team has identified outcomes related to each challenge and root cause, brainstorm strategies that will address the challenges/root causes and achieve the desired outcomes (including bringing forward those ideas for activities that have come up thus far).

Prioritize Strategies to Implement

The leadership team can use a Prioritization Matrix to decide which strategies will most effectively address the identified root causes and achieve the desired outcomes. After completing a root cause analysis, the team should focus on 3–5 concrete, attainable strategies and then plot each on the matrix.

The matrix allows team to rank strategies based on two criteria: their potential impact and the level of effort or resources required (see graphic).

Prioritize quick-win strategies that will have a big impact on the challenge but not take a lot of time, effort, or other resources to put into place. Decide whether resources are available or may become available in the future to support strategic-investment strategies that will have a big impact but take a lot

of resources. Similarly, decide whether fill-in tasks would be of any use—for example, as a starting point for other improvement strategies. Avoid time-waster strategies. By working through the prioritization matrix for each proposed strategy, the leadership team can reach consensus on moving forward with the most efficient investment of resources to achieve the greatest impact for the team's vision.

Determine the best way to facilitate whole-group participation and document the leadership team's matrix discussion. If meeting in person, chart paper with sticky notes may work. If meeting virtually or even in person, consider using a digital tool like Padlet to create the matrix and rank the proposed strategies. As the team processes the matrix, they may shed light on the available resources and timelines for each strategy, helping to ensure that final decisions are grounded in the team's capacity to carry out the work.



Develop an Action Plan

Once the leadership team agrees on priorities, they can create a detailed action plan that translates the strategies into action. The action plan serves as a step-by-step roadmap for carrying out each strategy. At minimum, the plan should outline the following for each strategy:

- **Desired outcome:** What does success look like?
- **Strategy:** What actionable strategy is needed to achieve the desired outcome? (This may come from the prioritization matrix.)
- **Subtasks:** What smaller steps or activities (e.g., staff training, printing or collecting materials, approvals from state or other partners) are required to complete the strategy?
- **Timeline:** What is the time frame for each subtask and the overall strategy? What are the major progress markers?
- **Resources:** What tools, funding, or supports are needed?
- **Engagement:** Who needs to be involved or informed?
- **Ownership:** Who will lead the strategy, and who will support it?

The leadership team may elect to use the action plan to track progress and document lessons learned along the way (what worked well and what challenges emerged). In this case, add the relevant categories to the action plan template. For more complex strategies, the team may want to use a Gantt chart to break subtasks into smaller activities, monitor progress across multiple initiatives, and ensure activities stay on schedule. Depending on what the leadership team intends to implement, it may take several meetings to complete the action plan. Revisit and review the action plan during subsequent leadership team meetings, and refine the plan as needed.

Phase 4: Prepare

During the Prepare phase, the leadership team ensures that the resources, infrastructure, and skills are in place to successfully launch and sustain improvement activities. This phase includes developing materials and tools required for the work, establishing clear processes for collecting and managing data, and training staff and partners to carry out their roles effectively.

Prepare: Guiding Questions

- What resources, materials, and tools do we need to implement our strategies effectively?
- What materials does the leadership team need to obtain and/or create?
- What buy-in, skills, or supports (e.g., financial, material, and staffing resources) are needed?
- What training or capacity-building will ensure staff and partners can carry out their roles effectively?
- What data will we access or collect to evaluate the effectiveness of our strategies?
- How will we manage and share data to track progress and inform decision-making?

Prepare: Key Activities

- ☐ Develop or obtain materials to support implementation of strategies
- ☐ Plan for collecting and reviewing data related to the strategies
- ☐ Train staff and partners (as applicable)

Develop or Obtain Materials to Support Implementation of Strategies

First, develop or obtain the materials or tools needed to support what you have planned (keeping in mind the intended use and audience for each resource). Consider what you need to carry out the activities. For example:

- Do you need general marketing materials (posters, flyers, etc.) with information about developmental milestones and contact information for the EI program?
- Do you need a letter or flyer tailored for local pediatricians/medical providers that provides general and contact information about the EI program or the referral process?
- Do you need training materials for local early care and education providers or EI intake staff?

Sometimes, the discussion of needed materials/tools will reshape the planned activities. For example, if the leadership team wants to develop a new poster but realizes there is no budget to support printing, there may be an existing flyer or other marketing tool that could be slightly modified to meet the need. One leadership team, during the pilot of the Child Find ACCESS model, successfully printed QR code stickers (with links to the local EI program) and added them to existing materials for distribution. Use the guiding questions for this phase (see box above) to facilitate discussions and planning with the leadership team about what resources you have and what resources you need.

Plan for Collecting and Reviewing Data Related to the Strategies

Next, decide with the leadership team how to keep track of the strategies as (and after) they are launched. This plan should specify data on implementation status and data on outcomes, as well as how frequently the team wants to be updated. What feedback loops will you put in place so that the people implementing the activities and other key partners (as relevant) can keep the leadership team updated on progress, ask questions, suggest improvements, and so on? Will the team need to review referral or other administrative EI data during implementation to determine whether activities are having the intended impact?

The leadership team may decide to add these components to the action plan template (see “Develop an Action Plan” in Phase 3). You could upload the action plan or a separate activity log in a shared digital workspace and set expectations for inputting, reading, and responding to updates. Or you might include data collection/reporting and other communication protocols in existing supervision or project communication structures and processes. Try to stay as open as possible to options that are the lightest lift. Ask the individuals who will be implementing the action plan for their input about data collection, documentation, and communication.

Whatever the leadership team decides, make sure that data collection, reporting, and review expectations are documented and communicated to those collecting and reporting data. Also make sure that data collection and reporting mechanisms are in place and working and that everyone is on board with the planned process. And remember that—as with other phases—you may need to revisit this plan for tracking the strategies as you adjust the strategies themselves or aspects of their implementation.

Train Staff and Partners (as Applicable)

The final step in the Prepare phase is to train staff and partners as needed on the strategies and activities they will be implementing and the related data collection and communication protocols. Consider what training is needed, who will design it, and how you will roll out the initial training. Some activities may require a simple orientation to the activity and the related expectations and mechanisms for documenting progress and communicating questions. Others may require more

extensive or frequent training or support, particularly if the activity is to be sustained over time. Consider whether you can tap existing trainings or training schedules. How will you evaluate whether it is effective in preparing staff to implement the related activities?

Remember to update the leadership team on training progress and to update the action plan to reflect any changes made along the way.

Phase 5: Use and Refine

In the Use and Refine phase, the leadership team moves strategies from planning to practice, focusing on implementation, feedback, and adaptation. As practices are implemented, the team should review feedback from those implementing the improvements as well as related key partners and review data to assess the implementation and the effectiveness of the strategies. If (and when) challenges arise, the team should convene and engage with those implementing the strategies to identify root causes and practical solutions.

Use and Refine: Guiding Questions

- Are we getting timely feedback from those implementing the strategies?
- Are strategies being implemented as intended?
- What implementation barriers are getting in the way, and why are they happening?
- What recommendations do those implementing the strategies have for addressing barriers or improving implementation?
- What can the leadership team do about these barriers or needed improvements?

Use and Refine: Key Activities

- ☐ Carry out the action plan
- ☐ Monitor improvement strategies
- ☐ Refine the action plan or strategies as needed

Carry Out the Action Plan

In this step, the leadership team implements the improvement activities according to the action plan—take a moment to celebrate this achievement! As suggested earlier, it can be helpful to document progress through a document in a shared digital workspace so that each member of the leadership team can stay up to date on the rollout of planned strategies and activities.

Monitor Improvement Strategies

Monitoring improvement strategies includes two separate but related components: monitoring implementation (are the strategies being implemented as intended?), and monitoring impact

(are the strategies addressing the issues as expected?). For the first component, and adhering to your data collection, reporting, and review plan (see “Plan for Collecting and Reviewing Data” in Phase 4), convene the leadership team to review progress. Questions to ask may include:

- How is implementation of the improvement strategies going?
- What do those implementing the improvement strategies report about successes and challenges?
- What are key partners reporting about the strategies and how the rollout is going?

You may find that some strategies take more or fewer resources to implement than expected. Document successes and challenges and decide as a group what the leadership team can do to address barriers. Do those individuals carrying out the action plan have recommendations for improvements or adjustments? Are there issues that would benefit from a deep dive root cause analysis process?

For the second component (monitoring impact), think about the timing of activities in relation to the challenges the leadership team identified and the team’s long-term vision. It may take time for successful implementation of improvements to have the intended effect on referrals, referral outcomes, and the leadership team’s priorities or goals. Review data on the desired outcomes with this time frame in mind, and note possible impacts of the activities on the team’s goals. Do the data suggest success and/or need to revisit improvement strategies, issues, and/or goals? Celebrate even small wins at this stage.

Refine the Action Plan or Strategies as Needed

The final step in the Use and Refine Phase is to act on what you and the leadership team have learned in monitoring the action plan rollout. This includes adjusting implementation to maximize efficiency and effectiveness. For example, you might find that outreach materials for certain neighborhoods need to be translated into additional languages. Or you could discover more efficient ways of delivering training on the referral process to certain groups, such as by incorporating the content into existing trainings or developing a training video instead of doing in-person training. As you consider opportunities for refinement, think about whether you need to obtain additional data, engage additional partners, or conduct additional root cause analyses, or if you need to revisit any of the prior steps in the Explore and Design phases.

Phase 6: Sustain

In the Sustain phase, the leadership team continues to monitor implementation and related outcomes or goals and takes action as needed to sustain successful improvement strategies and address or eliminate unsuccessful strategies.

At this point, it may be useful to transition the work of the leadership team to a regularly convening group whose focus is aligned to the vision of the leadership team. In the Child Find ACCESS pilot, one community shifted its work to a local interagency coordinating council (LICC) that focused on child find and other issues and already included many of the leadership team members as participants. The LICC included updates on the leadership team's work in its regular meeting agendas and continued to support improvement activities in that community.

Sustain: Guiding Questions

- Are our strategies starting to make a difference? If not, why not?
- What should the leadership team do next given what we're learning?
- How can the leadership team expand what's working?
- How can the leadership team address what's not working?
- How will we integrate successful strategies into policies, procedures, and everyday practice?
- How will we continue to engage key partners in identifying and addressing emerging needs or opportunities?
- How will we revisit and refine our strategies over time to sustain and build on positive outcomes?

Sustain: Key Activities

- ☐ Monitor data on intended outcomes and strategies
- ☐ Address new challenges and extend successful strategies
- ☐ Plan for continuous quality improvement and evaluation

Monitor Data on Intended Outcomes and Strategies

As part of the ongoing work of the Child Find ACCESS model, the leadership team continues to review data on the improvement strategies and the overall goal or vision for the work. What do the data and feedback on improvement strategies tell? As programs experience turnover and as the community experiences demographic or population changes, you may see related changes in the effectiveness or impact of improvement activities. Questions to consider include:

- Are there capacity issues to address to ensure the strategies are being implemented as intended over time and with new personnel involved?
- Are there new or emerging needs in the target population (intended recipients of or participants in the improvement strategies)?

- Are there new partners to include in the discussions about the needs and the improvement strategies?

Address New Challenges and Extend Successful Strategies

Decide as a team whether any challenges identified while monitoring the action plan activities can and should be addressed. Do individuals or agencies connected with the team have the capacity to address the challenges? Do the challenges necessitate long- or short-term fixes or supports? The team could revisit the Prioritization Matrix to determine which of these new supports will be the lightest lift and have the biggest impact on improvement strategies. Also, the leadership team may decide to end any strategies that are not having the intended impact or those with challenges that the team or key partners cannot address.

For successful strategies with promising early results, decide as a team the best ways to sustain those strategies, such as by embedding them into existing workflows, outreach mechanisms, training/professional development systems, or other relevant ongoing work. You may need to formalize interagency agreements, policies, or memorandums of agreement to support ongoing data sharing or other collaboration. In addition to involving local partners in these discussions, you can collaborate with state partners at this stage to help you identify state- or system-level resources to support ongoing work. The more successful improvement strategies you can incorporate into existing procedures and policies, the more sustainable they will be.

Plan for Continuous Quality Improvement and Evaluation

Congratulations! The leadership team has successfully navigated the bulk of the Child Find ACCESS model for child find system improvement. As you celebrate this milestone, be sure to make a realistic plan for ongoing monitoring, periodic evaluation, and continuous improvement of your strategies. Discuss as a team how to facilitate ongoing evaluation and improvement of strategies and outcomes. For example, regular email updates with data on the improvement strategies and referral and referral outcome data could support the team's ongoing oversight. You may meet less frequently to discuss the data and feedback from those implementing the strategies and other key partners.

Remember that sustaining the positive impact of your improvement strategies for the leadership team's goals requires ongoing attention and periodic adjustments (to the strategies themselves, the data being collected and analyzed, and the partners involved). Continuing to invest in this process will enable the leadership team to maximize sustainability of child find improvements and better serve children and families eligible for EI services.

Resources

- [Child Find ACCESS project page](#): SRI implemented a community-based, tailored approach to improving child find systems with three counties in North Carolina.
- [Introduction to Child Find ACCESS](#)
- [Child Find ACCESS Model Implementation Checklist](#)
- [Engaging Communities in Analyzing Data for Child Find Improvements](#)
- [Centering Family Voices to Advance Access to Early Intervention](#)



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