KIPBS PCP Meeting Facilitation Mentor Observation Checklist - ONSITE

Student's Name: _____ **Date:** _____

Person's Name: _____ **Location:** _____

Observer's Name: _____ **Observation Length:** _____

Mentoring Specialist instructions:

1. Please look for performance of the activities listed on the table below as you observe the KIPBS student facilitate the PCP meeting.
2. At the end of the observation period, for each activity listed on the table, please circle: "Y" (Yes) if the student performed that activity, "N" (No) if the student did not perform that activity but should have, or "N/A" if that activity did not apply to this meeting.
3. Check whether or not the student met criteria on this observation. In order for criteria to be met for a category, <u>all</u> of the items for that category need to either be marked "Y" or "N/A."
4. Enter this information in the student's KIPBS Student Mentor Observation Tracking form.
5. Based on your observations provide constructive feedback to the student by praising the things that he/she did well, and by letting him/her know what may be some things to work on, and how.
6. **Send the information on this sheet, by e-mailing an attachment of this form with the current information, along with notes on feedback provided, to the Mentoring Coordinator and to the student's instructor. Send a carbon copy of that e-mail to the student.**

Person's Active Involvement	Activity Performed?			Criteria met?	
The student reminds the team that this meeting is about the person and his/her wants and needs	Y	N	N/A		
The student is engaging the person and team members throughout the meeting	Y	N	N/A		
The student asks the person questions throughout the meeting in ways that work well	Y	N	N/A		
The student makes sure choices are always available for the person throughout the meeting	Y	N	N/A	Y	N
If the discussion drifts to other subjects, the student redirects the discussion back to issues related to the person	Y	N	N/A		
The student helps set the context for the person to communicate what is important to them	Y	N	N/A		
If the person has trouble communicating with others, the student describes what activities he/she conducted prior to the meeting (ex. observations) to ensure active involvement of the person	Y	N	N/A		

Strength/ Preference Based	Activity Performed?			Criteria met?	
The student set the stage for highlighting the person's strengths	Y	N	N/A		
The student creates opportunities for everyone to talk about the person's accomplishments	Y	N	N/A		
The student structures the meeting so that discussion is based on the person's preferences (the discussion may touch upon issues surrounding challenges indirectly, but this is <u>not</u> the focus of the meeting)	Y	N	N/A	Y	N
Whenever the person's preferences are made discussed, the student makes sure that this is an actual preference, by either directly asking the person if it is or creating ways to confirm preference if the person has trouble communicating	Y	N	N/A		

Clear Goals	Activity Performed?			Criteria met?	
The goals selected for the person are based on clear preferences and needs	Y	N	N/A		
The student guides the person and team to break down long-term goals into manageable short-term goals	Y	N	N/A		
The student re-states short-term goals as "To Dos" (ex. "We need to check on the availability of the swimming pool")	Y	N	N/A	Y	N
The student ensures that each "To Do" has at least one team member assigned to it	Y	N	N/A		
The student ensures that each "To Do" has a date by when it should be done	Y	N	N/A		

The student summarizes for the team each "To Do," which member is responsible for completing it, and by when	Y	N	N/A	
The student asks the team if there are any questions and if all the goals are clear	Y	N	N/A	
A follow up meeting is set or planned	Y	N	N/A	