

Healthy Living: Self-Management of Chronic Conditions Workshop

Master Trainers and Experienced Workshop Leaders: Instructions for Coaching Workshop Facilitators

Standard

Master Trainers or experienced facilitators will observe the Workshop Leaders/Facilitators who are under their oversight and coordination, at least once, during the first workshop they co-facilitate. Experienced workshop facilitators are Leaders who have facilitated at least two workshops and presented no serious fidelity issues during a fidelity coaching visit.

Additionally, all workshop Leaders and Master Trainers should be observed on a yearly basis to ensure workshop fidelity is maintained.

The Purpose

The purpose of fidelity coaching is to support Facilitators and share ideas to ensure fidelity. It is an opportunity to strengthen the facilitator/lay leader model and to maintain the quality of the Healthy Living program.

Forms

- This instruction sheet details the process for the observer or fidelity “coach.” The checklist is the tool used to conduct the observation.
- The Healthy Living Workshop Checklist Summary, a step by step guide for delivering the program, includes a summary page **and** a sheet for each of the 6 sessions.
- The following documents should be sent to the Workshop Facilitator(s), in advance of the visit:
 - the “Workshop Checklist Summary” sheet including the “Fidelity Checklists” for all six sessions
 - the “Workshop Facilitator: Overview of a Fidelity Coaching Visit” document which explains the process for the Facilitator.
- If you are observing both Workshop Facilitators:
 - Bring four copies of the summary page (two for you to keep and one for each Facilitator)
 - Bring two copies of the checklist for the specific session observed (you will keep both copies, but you need one for each Facilitator)

The Process

1. Sessions 2, 3, 4, or 5 are best for observation. Stanford suggests not observing on session 1 or 6.
 2. Arrange in advance to attend a specific session. Plan for additional time after the session or at another date to review the summary sheet. Do NOT show up unannounced.
 3. Ask the Workshop Facilitator to inform the group in advance that someone will attend to observe the Facilitator. Emphasize that this person is strictly there to observe, not to participate or be called upon as an “expert”.
 4. The role of the coach is observation only; do not participate in the session.
 5. Ask the Workshop Facilitator to introduce the Fidelity Coach, whose role is to observe the Facilitator.
 6. Use a separate summary sheet for each Workshop Facilitator.
 7. Complete the summary sheet during the session
 8. Provide a summary sheet for the Workshop Facilitator to take notes on during the session review.
 9. Review the summary sheet with the Workshop Facilitator after the session or at another pre-arranged time.
 10. Once the observation session has been discussed, both the Workshop Facilitator and the Coach will sign the original copy of the summary sheet.
 11. The Coach will maintain the signed summary sheet for each Workshop Facilitator and forward by fax or scanned email to the Institute for record keeping.
- ** If at any time concerns emerge regarding the ability of a Facilitator to lead a workshop or any other concern, these concerns should be discussion in private. Additionally, these concerns should be documented.

Healthy Living: Self-Management of Chronic Conditions Workshop

Workshop Facilitators: Overview of Fidelity Coaching Visit

Standard

All Workshop Facilitators will be observed at least once, during the first workshop they co-facilitate, by a Master Trainer or experienced Leader. Identification of serious fidelity issues may warrant follow up coaching. After the initial visit, a Workshop Facilitator with no serious fidelity issues will have one fidelity coaching visit per year.

The Purpose

The purpose of the fidelity coaching is to support the Workshop Facilitator and share ideas to ensure fidelity. It is an opportunity to strengthen the Workshop Facilitator model and to maintain the quality of the Healthy Living Workshops.

The Process

- The workshop checklist details all aspects of the 6-week program. It is a step-by-step guide for delivering the program and will be used to conduct the observation. The observer or “Coach” will send the Workshop Facilitator the workshop checklist summary sheet and the specific page for the session being observed.
- Currently there is a checklist for the 2010 curriculum and one for the 2012. Please use the checklist that corresponds with the curriculum being used.
- Prior arrangements will be made for the Coach to attend a specific session. Plan for additional time to review the summary sheet immediately following or at another date (~ 1 hour). Observers will NOT show up unannounced.
- Sessions 2, 3, 4, or 5 are best for observation.
- Workshop Facilitators should inform the group in advance that someone will be observing to ensure fidelity of the program.
- Introduce the Coach as a guest who is observing the Workshop Facilitators. The Coach is not to participate or be called upon as an “expert”.
- The summary sheet will be completed by the Master Trainer or experienced Leader. Both the Workshop Facilitators and Coach will review and sign the summary sheet after the session or at another pre-agreed upon time.
- Both the Workshop Facilitator and the Coach will maintain a copy of the summary sheet.
- Completed forms will be sent to the Institute. The Fidelity Coach may choose to keep a copy for his/her records.

Thank you for your commitment and dedication to the Healthy Living Workshops.

Healthy Living: Self-Management of Chronic Conditions Workshop Checklist Summary (2012 Curriculum)

Date: _____
 Workshop Leader: _____
 Site Name: _____

Session Attended: session # _____
 Observer: _____
 Number of participants in class: _____

Skills	Comments/Suggestions
<p><u>Class Prep</u></p> <p><input type="checkbox"/> Arrived on time with materials/charts.</p> <p><input type="checkbox"/> Room appropriate: protecting confidentiality, seating arranged in a “U” or circle, lighting, temperature, ADA, noise and distractions, ability of all trainees to see and hear, charts are legible handwriting, dark colored marking pens, easily readable</p>	
<p><u>Delivery of Workshop</u></p> <p><input type="checkbox"/> Follows the curriculum as scripted in the Lay Leader Manual</p> <p><input type="checkbox"/> Clearly explained topics and activities</p> <p><input type="checkbox"/> Presentation style appropriate; articulate, eye contact, inflection</p> <p><input type="checkbox"/> Modeled activities correctly</p> <p><input type="checkbox"/> Positively reinforced participants</p>	
<p><u>Group Interaction</u></p> <p><input type="checkbox"/> Encouraged group participation</p> <p><input type="checkbox"/> Limited personal stories</p> <p><input type="checkbox"/> Handled problem people effectively</p> <p><input type="checkbox"/> Adhered to timelines</p> <p><input type="checkbox"/> Worked well as a partner with co-leader</p>	
<p><u>Brainstorming</u></p> <p><input type="checkbox"/> Encouraged to produce as many ideas as possible</p> <p><input type="checkbox"/> Repeated ideas</p> <p><input type="checkbox"/> Reminded group not to comment on ideas</p> <p><input type="checkbox"/> Did not allow discussion/questions</p> <p><input type="checkbox"/> Used silence</p> <p><input type="checkbox"/> Person writing not leading activity</p> <p><input type="checkbox"/> Offered own response only at end</p> <p><input type="checkbox"/> Reviewed the list by reading ideas</p> <p><input type="checkbox"/> Provided opportunity for clarification</p>	

<p><u>Action Planning</u></p> <p><input type="checkbox"/> Used chart to point out steps as trainees shared their action plans</p> <p><input type="checkbox"/> Pointed out “will” if participant used try, should, want or think</p> <p><input type="checkbox"/> Helped identify barriers if confidence level is less than 7</p> <p><input type="checkbox"/> Asked the group for suggestions before the leaders offered responses</p>	
<p><u>Feedback/Problem Solving</u></p> <p><input type="checkbox"/> Asked person to state their action plan and success/problems</p> <p><input type="checkbox"/> Complimented appropriate action plan adjustment/modification</p> <p><input type="checkbox"/> If problems, what barriers existed and did they try a solution?</p> <p><input type="checkbox"/> Asked person if they would like help</p> <p><input type="checkbox"/> Asked for a show of hands if they have the same/similar problem</p> <p><input type="checkbox"/> Conducted brainstorm appropriately</p> <p><input type="checkbox"/> Limited to 3 ‘yes buts’</p> <p><input type="checkbox"/> Recommended person make a note of suggestions offered</p>	
<p><u>Fidelity</u></p> <p><input type="checkbox"/> Delivered all content materials according to the current Stanford leaders’ manual</p> <p><input type="checkbox"/> Accurately paraphrased sections of activities</p> <p><input type="checkbox"/> Distributed and collected appropriate Institute data collection forms</p>	
<p>Additional Comments:</p>	

Signature of Workshop Facilitator: _____

Signature of Fidelity Coach: _____

Session 1 Fidelity Checklist (2012 Curriculum)

	Comments
<input type="checkbox"/> Agenda posted, name tags available <input type="checkbox"/> Workshop Attendance Log available <input type="checkbox"/> Surveys and consent letters distributed and collected	
Activity #1 Introduction of Workshop	
<input type="checkbox"/> Appropriately introduced self and co-facilitator <input type="checkbox"/> Paraphrased scripted portions without adding or removing content <input type="checkbox"/> Accurately presented material on Charts 1, 2, and 3 <input type="checkbox"/> Distributed and discussed overview/ homework handout	
Activity #2 Group Introductions	
<input type="checkbox"/> Modeled introductions, 1-2 problems caused by chronic condition <input type="checkbox"/> Accurately delivered instructions for introductions <input type="checkbox"/> Co-facilitator wrote concerns on white board/chart pad <input type="checkbox"/> Pointed out that concerns are the same	
Activity #3 The Mind-Body Connection/Distracton	
<input type="checkbox"/> Used Charts 2 and 4 as directed in the script <input type="checkbox"/> Guided through lemon activity slowly <input type="checkbox"/> Clearly discussed brainstorm guidelines <input type="checkbox"/> Conducted brainstorm appropriately <input type="checkbox"/> Timed distraction techniques correctly	
Activity #4 Getting a Good Night's Sleep	
<input type="checkbox"/> Paraphrased scripted portions without adding or removing content <input type="checkbox"/> Conducted brainstorm appropriately	
Activity #5 Introduction to Action Plans	
<input type="checkbox"/> Presented info in Chart 5, posted on wall <input type="checkbox"/> Modeled action plan appropriately <input type="checkbox"/> Broke people into pairs, family members not paired with each other. Used a timekeeper <input type="checkbox"/> Asked for volunteer to report on action plan <input type="checkbox"/> Summarized each action plan by using the standard: <input type="checkbox"/> Something YOU WANT to do <ul style="list-style-type: none"> Achievable Action specific Answers what, how much, when, how often Confidence level of 7 or more <input type="checkbox"/> For confidence levels < 7, guided through identification of barriers. <input type="checkbox"/> Informed participants that leaders will be calling them to support them in their plans.	
Activity #6 Closing	
<input type="checkbox"/> Reviewed 7 items <input type="checkbox"/> Followed activity timelines, class ended within 2 ½ hours	

Session 2 Fidelity Checklist (2012 Curriculum)

	Comments
<input type="checkbox"/> Agenda and Charts 2, 3, 4, 5, and 6 posted <input type="checkbox"/> Charts have legible handwriting, dark colored marking pens, easily readable, name tags available	
Activity #1 Feedback/Problem Solving	
<input type="checkbox"/> Modeled feedback, stated action plan and level of success, asked for volunteer <input type="checkbox"/> Complimented appropriate action plan adjustment/modification <input type="checkbox"/> If action plan is not achieved: Followed steps illustrated on flow chart <input type="checkbox"/> Conducted brainstorm appropriately <input type="checkbox"/> Limited to 3 'yes buts', offered the person to choose one idea <input type="checkbox"/> Recommended person make a note of suggestions offered <input type="checkbox"/> Modeled problem-solving steps appropriately, reviewed chart 6	
Activity #2 Dealing with Difficult Emotions	
<input type="checkbox"/> Utilized Chart 7 to illustrate difficult emotions <input type="checkbox"/> Facilitators modeled own causes of difficult emotions correctly <input type="checkbox"/> Accurately delivered instructions for group activity: Reporting for your partner Info does not have to be shared <input type="checkbox"/> Checked with partners for accuracy <input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet) <input type="checkbox"/> Asked participants to volunteer any new things they are going to use to deal with these emotions in the future <input type="checkbox"/> Specified writing or journaling for dealing with difficult emotions <input type="checkbox"/> Asked participants to share something they are grateful for	
Activity #3 Introduction to Physical Activity and Exercise	
<input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet) <input type="checkbox"/> Utilized Chart 8, paraphrased section appropriately <input type="checkbox"/> Asked participants to identify physical activity goal and barrier <input type="checkbox"/> Problem solved with 1-2 participants <input type="checkbox"/> Encouraged choosing a goal around physical activity	
Activity #4 Preventing Falls and Improving Balance	
<input type="checkbox"/> Reviewed Chart 9, paraphrased appropriately <input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet)	
Activity #5 Making an Action Plan	
<input type="checkbox"/> Clearly utilized Chart 5-reminded participants that the plan should be something they want to do and be achievable <input type="checkbox"/> Conducted action plan appropriately (see summary sheet)	
Activity #6 Closing	
<input type="checkbox"/> Reviewed 9 items <input type="checkbox"/> Followed activity timelines, class ended within 2 ½ hours	

Session 3 Fidelity Checklist (2012 Curriculum)

	Comments
<input type="checkbox"/> Agenda and Charts 2, 3, 4, 5, 6, and 7 posted <input type="checkbox"/> Charts have legible handwriting, dark-colored marking pens, easily readable, name tags available	
Activity #1 Feedback/Problem Solving	
<input type="checkbox"/> Modeled feedback, stated action plan and level of success, asked for volunteer <input type="checkbox"/> Complimented appropriate action plan adjustment/modification <input type="checkbox"/> If action plan was not achieved: <input type="checkbox"/> Followed steps as illustrated on flow chart <input type="checkbox"/> Conducted brainstorm appropriately <input type="checkbox"/> Limited to 3 'yes buts', offered the person to choose one idea <input type="checkbox"/> Recommended person make a note of suggestions offered <input type="checkbox"/> Modeled problem solving steps appropriately, reviewed Chart 6	
Activity #2 Making Decisions	
<input type="checkbox"/> Accurately delivered material and review of Charts 10 and 11 <input type="checkbox"/> Delivered decision making activity instructions correctly, broke into pairs, did not exceed 10 minutes <input type="checkbox"/> Asked 1 or 2 pairs to share using points 1-3	
Activity #3 Pain and Fatigue Management	
<input type="checkbox"/> Clearly delivered activity content, appropriately brainstormed using different color markers to represent pain and fatigue	
Activity #4 Endurance Activities: How Much is Enough?	
<input type="checkbox"/> Clearly delivered content, using Charts 7, 12, 13, and 14 <input type="checkbox"/> During endurance monitoring, one leader marched in place and the other led the orchestra <input type="checkbox"/> Suggested to participants to keep a log of physical activity done each day	
Activity #5 Body Scan	
<input type="checkbox"/> Let participants know that participation in this activity is optional <input type="checkbox"/> Conducted "Body Scan Relaxation" appropriately by reading or using CD <input type="checkbox"/> Encouraged participants to give this activity a two week try <input type="checkbox"/> Mentioned that the script is printed in the book	
Activity #6 Making an Action Plan	
<input type="checkbox"/> Accurately utilized Chart 5-reminded participants that the plan should be something they want to do and be realistic <input type="checkbox"/> Conducted making an action plan appropriately (see summary Sheet)	
Activity #7 Closing	
<input type="checkbox"/> Reviewed 8 items <input type="checkbox"/> Followed activity timelines, class ended within 2 ½ hours	

Session 4 Fidelity Checklist (2012 Curriculum)

	Comments
<input type="checkbox"/> Agenda and Charts 2, 3, 4, 5, 6, and 7 posted <input type="checkbox"/> Charts are legible handwriting, dark colored marking pens, easily readable, name tags available	
Activity #1 Feedback/Problem Solving	
<input type="checkbox"/> Modeled feedback, stated action plan and level of success, asked for a volunteer <input type="checkbox"/> Complimented appropriate action plan adjustment/modification <input type="checkbox"/> If action plan is not achieved: <input type="checkbox"/> Followed steps as illustrated on flow chart <input type="checkbox"/> Conducted brainstorm appropriately <input type="checkbox"/> Limited to 3 'yes buts', offered the person to choose one idea <input type="checkbox"/> Recommended person make a note of suggestions offered <input type="checkbox"/> Modeled problem solving steps appropriately, reviewed Chart 6	
Activity #2 Better Breathing	
<input type="checkbox"/> Accurately delivered material and review of Chart 15 <input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet) <input type="checkbox"/> Correctly demonstrated pursed lip & diaphragmatic breathing technique	
Activity #3 Healthy Eating	
<input type="checkbox"/> Facilitator modeled what was learned from food diary <input type="checkbox"/> Asked four or five participants to share <input type="checkbox"/> Clearly presented information and Charts 16 and 17. <input type="checkbox"/> Described healthy eating not as dieting, but making small changes <input type="checkbox"/> Directed participants to appropriate pages in book <input type="checkbox"/> Conducted call outs/questions appropriately, confirmed correct answers <input type="checkbox"/> Asked participants to bring labels to share for Session 5	
Activity #4 Communication Skills	
<input type="checkbox"/> Delivered content according to manual, clearly explained "T" messages <input type="checkbox"/> Delivered role-plays accurately	
Activity #5 Problem Solving	
<input type="checkbox"/> Reviewed Chart 8 <input type="checkbox"/> Delivered instruction for group activity clearly <input type="checkbox"/> Kept reports concise <input type="checkbox"/> Statement of problem clear, asked for up to 3 ideas <input type="checkbox"/> Checked with partner for correctness	
Activity #6 Making an Action Plan	
<input type="checkbox"/> Accurately utilized Chart 5 -reminded participants that the plan should be something they want to do and be realistic <input type="checkbox"/> Conducted action plan appropriately (see summary sheet)	
Activity #7 Closing	
<input type="checkbox"/> Reviewed 7 items, encourage choosing new buddies to call <input type="checkbox"/> Followed activity timelines, class ended within 2 ½ hours	

Session 5 Fidelity Checklist (2012 Curriculum)

	Comments
<input type="checkbox"/> Agenda and Charts 2, 3, 4, 5, 6, 7 and 8 posted <input type="checkbox"/> Charts are legible handwriting, dark colored marking pens, easily readable, name tags available	
Activity #1 Feedback/Problem Solving	
<input type="checkbox"/> Modeled feedback, stated action plan and level of success, asked for a volunteer <input type="checkbox"/> Complimented appropriate action plan adjustment/modification <input type="checkbox"/> If action plan is not achieved: <input type="checkbox"/> Followed steps as illustrated on flow chart <input type="checkbox"/> Conducted brainstorm appropriately <input type="checkbox"/> Limited to 3 'yes buts', offered the person to choose one idea <input type="checkbox"/> Recommended person make a note of suggestions offered <input type="checkbox"/> Modeled problem solving steps appropriately, reviewed Chart 6	
Activity #2 Making Healthy Food Choices	
<input type="checkbox"/> Clearly presented Chart 19, paraphrased appropriately <input type="checkbox"/> Conducted "call outs" correctly. Identified correct answers <input type="checkbox"/> Had supply of labels available for participants who needed them <input type="checkbox"/> Referred to corresponding pages in book	
Activity #3 Medication Usage	
<input type="checkbox"/> Clearly presented content, used Charts 20, 21, and 22 <input type="checkbox"/> Conducted combination brainstorm/problem-solving appropriately	
Activity #4 Making Informed Treatment Decisions	
<input type="checkbox"/> Clearly presented content, used Chart 23	
Activity #5 Depression Management	
<input type="checkbox"/> Utilized Chart 7 appropriately <input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet) <input type="checkbox"/> Reminded participants alcohol and some drugs can make depression worse <input type="checkbox"/> Noted need for professional treatment for severe depression	
Activity #6 Positive Thinking	
<input type="checkbox"/> Accurately delivered information <input type="checkbox"/> Clearly presented Chart 24 <input type="checkbox"/> Allowed time for participants to suggest changes for negative emotions	
Activity #7 Making an Action Plan	
<input type="checkbox"/> Accurately utilized Chart 5-reminded participants that the plan should be something they want to do and be realistic <input type="checkbox"/> Conducted action plan appropriately (see summary sheet)	
Activity #8 Closing	
<input type="checkbox"/> Reviewed 7 items, including letters to doctors <input type="checkbox"/> Followed activity timelines, class ended within 2 ½ hours	

Session 6 Fidelity Checklist (2012 Curriculum)

	Comments
<input type="checkbox"/> Agenda and Charts 2, 3, 4, 5, 6, and 7 posted <input type="checkbox"/> Charts are legible handwriting, dark colored marking pens, easily readable, name tags, available	
Activity #1 Feedback/Problem Solving	
<input type="checkbox"/> Modeled feedback, stated action plan and level of success, asked for volunteer, <input type="checkbox"/> Complimented appropriate action plan adjustment/modification <input type="checkbox"/> If action plan is not achieved: <input type="checkbox"/> Followed steps as illustrated on flow chart <input type="checkbox"/> Conducted brainstorm appropriately <input type="checkbox"/> Limited to 3 'yes buts', offered the person to choose one idea <input type="checkbox"/> Recommended person make a note of suggestions offered <input type="checkbox"/> Modeled problem solving steps appropriately, reviewed Chart 6	
Activity #2 Working with Your Health Care Professional and Health Care System	
<input type="checkbox"/> Clearly defined health care system compared to health care provider <input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet) <input type="checkbox"/> Clearly presented Chart 25	
Activity #3 Weight Management	
<input type="checkbox"/> Accurately delivered content, paraphrased without adding or removing content <input type="checkbox"/> Asked for volunteers to share food dairy, managed sharing appropriately <input type="checkbox"/> Clearly presented Chart 26	
Activity #4 Looking Back and Planning for the Future	
<input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet) <input type="checkbox"/> Reviewed Chart 7 <input type="checkbox"/> Clearly modeled 3 to 6 month goals and steps to reach the goal <input type="checkbox"/> Problem-solved if appropriate <input type="checkbox"/> Participants shared accomplishments, pointed out helped each other <input type="checkbox"/> Appropriately delivered guided imagery activity <input type="checkbox"/> Certificates prepared and distributed <input type="checkbox"/> Participants completed Post Surveys	
Activity #5 Closing	
<input type="checkbox"/> Reviewed 5 items <input type="checkbox"/> Followed activity timelines, class ended within 2 ½ hours	

Follow up after Fidelity Coaching Session (AKA Observation Visit)

Fidelity Defined

Stanford defines workshop fidelity in the Master Trainer Manual (2015):

“Program Fidelity, at the organizational level refers to how closely administrators, peer leaders trainers and evaluators follow the program as intended by the developers. This includes consistency of delivery of the program’s core elements such as information, methods, timing and type of resources.”

The Arizona Living Well Institute has created a plan to ensure that fidelity is maintained through training, fidelity coaching, and follow-up. This document is designed to provide a follow-up for Master Trainers and experienced facilitators who observe serious fidelity issues during a fidelity coaching session.

Fidelity Coaching

Fidelity coaching sessions provide an opportunity for Master Trainers and experienced workshop facilitators to be observers and “Coaches” of leaders facilitating workshops. Coaches should inform the leaders that they will receive one fidelity coaching session a year, regardless of how many workshops are facilitated. However, Coaches should let leaders know that they are available if any questions or concerns come up. In most cases, Coaches will observe some fidelity issues, but rarely are they serious. Examples of the most common issues observed:

- Agenda is not posted.
- Leaders forget to ask for clarification after brainstorm.
- Leaders state brainstorm guidelines but participants still cross talk during brainstorm.
- Leaders allow participants to talk too long **OR** leaders stifle discussion.
 - This is a tricky balance, but either issue can harm a workshop.
- Leaders understand action planning process but leave out a step. Examples are forgetting to present their plans first or forgetting to ask a participant for confidence level.
- Charts are written in a manner that is difficult for participants to read.
- During feedback and problem solving, leaders forget to ask participants to state action plan.
- Leaders forget steps in the problem solving process.
- Time limits are not observed.

In most cases, these issues can be discussed and remedied while reviewing the observation checklist with leaders after the workshop session. Coaches should provide clear information from the Leaders’ Manual or Fidelity Manual when providing feedback. It is best for Coaches to use the “Feedback Sandwich” approach, providing constructive feedback “sandwiched” between encouraging, positive

feedback. Leaders should be asked to provide feedback on themselves before the Coach shares his/her observations.

Serious Fidelity Issues

In rare cases, fidelity issues may be more serious, threatening the integrity of the program. Examples of serious fidelity issues (Fidelity Manual, 2014):

- Leaders provide material that is not in the manual.
- Leaders use the manual but prepare their own lectures.
- Leaders invite lecture guests to class.
- Leaders / Trainers openly disagree and argue in front of the group.
- One or more Leaders refuse to co-lead with one another.
- Leaders give medical advice to participants.
- Leaders do not follow the times and sequence of activities and sessions indicated in the manual.
- Any other behaviors observed that disrupt the flow of the workshop or detract from workshop fidelity.

Follow Up

When a Coach observes serious fidelity issues, it is important to clearly document those observations and provide detail. Provide the Leader with clear feedback about the problems observed. Provide this information privately if only one Leader is at issue. If both Leaders have the same fidelity issues or if co-leader cooperation is an issue, feedback may be given with both Leaders present. In addition to the fidelity coaching session let the Leader know the following information and process:

1. Healthy Living (CDSMP) is an evidence-based program; if fidelity is not followed the licensed agency is in danger of losing its license, and the program will not have the same outcomes as it did in the research.
2. A follow-up fidelity coaching session will be scheduled, preferably during the same workshop. Try to schedule this as soon as possible.
3. A follow-up letter detailing the observations from the fidelity coaching will be sent to the leader within 7 working days.
4. The letter will be forwarded (mail, email or fax) to the Institute and the Lead Mentor.
5. A Fidelity Coach may wish to provide a copy of the follow-up letter to the licensed agency or may choose to wait until after the follow-up visit depending on the severity of the fidelity infraction.

Follow-up Observation Session

1. The Master Trainer or experienced workshop facilitator will follow the usual policy for fidelity coaching.
2. After the workshop session, be sure to congratulate the Leader on any corrections made in response to feedback from the first coaching session.
3. Document all observations.
4. Submit a copy of the follow-up visit to the Institute (mail, email, or fax).
5. Optional: The Coach may wish to submit a follow-up letter indicating that the issue is resolved.

If serious concerns still exist

1. Clearly communicate your concerns to the Leader.
2. Use the Leaders Manual and/or the Fidelity Manual as reference.
3. A letter detailing the observations from the follow-up fidelity coaching will be sent to the Leader within 7 working days.
4. The letter must be copied to the Institute, Lead Mentor, and licensed agency (mail, email or fax).
5. A meeting (phone or face to face) will be scheduled between the Fidelity Coach, Leader, Lead Mentor, and representative from the licensed agency.

Support

If at any time a Fidelity Coach does not feel a particular Leader is qualified to facilitate the Healthy Living (CDSMP) or Tomando Control de su Salud (Spanish CDSMP) program, he/she should discuss those concerns with the Lead Mentor.

Date

Name

Address

Dear XXXXX,

Encourage

Please find enclosed a copy of the fidelity coaching forms. I enjoyed being with you and XXXX and your participants there at XXXXXXXX. You are obviously a champion of the Healthy Living program and of the participants. You came very well prepared and enthusiastic

State the Problem Observed and Provide Basis from the Leaders/Fidelity Manuals

As I mentioned that day, the fidelity coaching is an opportunity to share information and provide feedback to support and strengthen leaders and their skills in facilitating Healthy Living in our communities. I believe this is an extremely important component of the program as we all strive to stay true to the guidelines Stanford has outlined for presentation of the workshops. Please know I am always available to provide support or research answers to questions for you.

Since we discussed Brainstorming the day we met and some of the challenges we as leaders can face, I have prepared a short review of some of the guidelines for the Brainstorming Process from our Leaders' Manual:

The purpose of brainstorming is to allow us to share as many ideas about a topic as possible in the quickest way possible. To do this, we'll be following these guidelines:

- a. Anyone who has an idea can share it.
- b. No one will comment either positively or negatively on any of the ideas during the brainstorm
- c. No one will ask questions or discuss any of the ideas until after the brainstorm
- d. When all the ideas are out, we'll go over anything that needs clarification

In addition to these guidelines brainstorming fundamentals can be found on page 4 or session 3 in the manual, as well as in the appendix under teaching techniques. Remember, leaders should not make suggestions during brainstorming or call on participants. Always provide time for clarification at the end of a brainstorm.

Since we also discussed appropriate workshop size during our meeting, here is a reference from the Fidelity Manual:

At least 10 on the first day of the workshop (if less, postpone the class or ask people to come to next scheduled workshop).

It is better to register more participants if possible to make room for attrition. Maximum registration is 20.

State the Follow up Action

As discussed when we met last week, I will attend your next workshop session (number 5) for a follow-up coaching session. I will be there as an observer, not to participate in the workshop. This is an opportunity for you to utilize the feedback provided last week.

Please let me know when you and XXXXX start the planning process for your next workshop and we can plan a conference call to brainstorm some ideas that might help with retention of participants. I would be happy to assist with a Session 0 or help in any way. We can always contact (**Lead Mentor**) for ideas too.

End on a Note of Encouragement

I just thought I would share one more idea from page 13 of the Implementation Manual: “Leaders are special”. I agree. Thank you for being one of those special Master Trainers/Leaders for the Healthy Living (CDSMP) program here in Arizona. Continue your excellent work. You have many strengths and talents.

Kindest Regards,

XXXXXXXX

Address

Phone

cc. Point of Contact, licensed agency

Healthy Living: Self-Management of Chronic Conditions Workshop Instructions for Observing Leader Training

Standard

Regional Mentors are identified by the Institute to coordinate Healthy Living activities in Northern, Central, and Southern Arizona regions. Mentors will observe newly trained Master Trainers who reside in these regions, at least once, during the first training they co-facilitate.

In some cases, an experienced Master Trainer may be identified to observe leader training in the event that the regional coordinator is unavailable. An “experienced Master Trainer” is defined as one who has facilitated at least one or more leader trainings and workshops without serious fidelity issues.

The Purpose

Master Trainers play a key role in program fidelity by conducting leader trainings. If leaders are not appropriately trained, Healthy Living Workshops will not produce the outcomes observed in the Chronic Disease Self-Management research. The purpose of the training observation is to support Master Trainers, provide technical assistance, and share ideas to ensure fidelity. It is an opportunity to strengthen the training model and to maintain the quality of the Healthy Living program.

Forms

- This instruction sheet details the process for the observer. The checklist is the tool used to conduct the observation.
- The Leader Training Checklist is a step by step guide for assessing the training skills of Master Trainers.
- Send the Training Checklist to the Master Trainers prior to the training. You may also schedule a training planning call prior to the training dates to provide technical assistance (TA) or answer any questions the trainers may have (see specifics under #2 below)..
- Since you are observing both trainers.
 - Bring checklists for both trainers. Even if one trainer has facilitated training in the past, you may record any observations and provide feedback.

Planning and Conducting the Visit

1. Arrange in advance to attend a specific training day. Plan for additional time at the end of the day or at another date to review the summary sheet. Do NOT show up unannounced.

2. Some newly trained Master Trainers may benefit from a technical assistance call prior to training. Schedule this one or two weeks prior to training so trainers have time to process the information.

Important subjects to cover on a TA call include: Use of the Master Trainers' Manual, giving feedback during practice teaching, and "hypermodeling" of action planning, problem-solving and brainstorming. You may also discuss the registration process and other logistical issues such as materials. Refer trainers to the Master trainers' manual or Institute documents such as "Implementing a Leader Training" when possible.

3. **Day 2 of training is the best day for observation.** This provides an opportunity to observe several training skills, including practice teaching. It is also early enough in the training process to identify serious fidelity issues.

If unable to attend on the second day of training, Day 1 is also a good day to observe.

The last two Days (3 & 4) are not ideal and may not provide an opportunity for intervention if fidelity issues are identified. However, it is better to observe a new Master Trainer on one of these days if the preferred days are not an option.

4. The observer should not participate in the training. Ask the Master Trainers to introduce the observer, whose role is to observe the trainers.
5. Use a separate checklist for each trainer. Be sure to document any serious issues observed.
6. The observer should be available on breaks or lunch to answer questions and provide feedback as needed. Maintain a supportive, friendly demeanor so the Master Trainers feel encouraged. Always provide clear, constructive feedback.
7. Review the checklist with the trainer(s) at the end of the day or at another pre-arranged time.
8. Once the observation session has been discussed, both the observer and the Master Trainer will sign the observer's copy of the checklist.
9. The observer will maintain the signed summary sheet for the Master Trainer and forward by fax or scanned email to the Institute for record keeping.

** At any time, if concerns emerge regarding the ability of a Master Trainer to facilitate leader training or any other concern arises, these concerns should be discussed in private. Additionally, these concerns should be documented.



Healthy Living: Self-Management of Chronic Conditions Leader Training Checklist Summary

Date: _____

Training Day Attended: _____

Master Trainer: _____

Observer: _____

Site Name: _____

Number of Trainees: _____

Skills	Comments/Suggestions
<p><u>Preparation</u></p> <ul style="list-style-type: none"> - Arrived on time with materials/charts. - Had all needed paperwork: Attendance roster, practice teach assignments, checklists, Workshop Overview, etc. - Appropriate facilities/room conducive to group interaction - Breakout room available, if more than 12 trainees - Leader and confidentiality agreements collected - All trainees have current license 	
<p><u>Curriculum Delivery</u></p> <ul style="list-style-type: none"> - Delivered material in own words when appropriate - Followed the curriculum as scripted in the Master Trainer Manual - Correctly used the “hat’s on, hat’s off” method - Clearly explained topics and activities - Presentation style was appropriate; articulate, eye contact, inflection - Over-models activities: “Hypermodeling” - Correctly demonstrated facilitation of Action Planning, Feedback and Problem-Solving, and/or brainstorming 	
<p><u>Group Interaction</u></p> <ul style="list-style-type: none"> - Encouraged group participation - Limited personal stories - Handled problem people effectively - Adhered to timelines - Worked well as a partner with co-trainer - Limited training oriented questions to session reviews and question and answer periods. - Facilitated constructive discussion - Positively reinforced trainees 	

<p><u>Training Skills</u></p> <ul style="list-style-type: none"> - Appropriately used “call outs” during session reviews - Effectively used scenario questions <ul style="list-style-type: none"> - Did not call on same trainee twice until all trainees had participated - Provided correct answers after trainees responded (if applicable) - Used participation roster to note observations - Responded to questions by modeling problem-solving when applicable - Utilized Parking Lot for questions that could be answered later 	
<p><u>Practice Teaching</u></p> <ul style="list-style-type: none"> - Clearly delivered instructions for Practice Teaching - While observing practice teaches, made sure that each trainee had adequate time to facilitate - Used “feedback sandwich” - Identified problem areas by providing clear, constructive feedback - Documented serious fidelity issues 	
<p><u>Fidelity</u></p> <ul style="list-style-type: none"> - Delivered all content materials according to the current Master Trainers’ Manual - Did not add or delete content - Distributed appropriate Institute data collection forms and provided instructions for use 	

Signature of Master Trainer: _____

Signature of Observer: _____

Additional Comments: