

Leader Training Fidelity Checklist

Please evaluate the Leader training on the following criteria by marking the appropriate column that best corresponds to your response:

Master Trainer's Name: _____ **Date:** _____

Location: _____

Day/Time Observed: _____ **Observer's Name:** _____

Checklist					
	Excellent	Good	Fair	Poor	N/A
	Yes		No		N/A
Arrived on-time for set up, start time & prepared to lead session with appropriate materials. Materials include: Name tags, hats (or alternative), easels and markers (or whiteboard), clock, printed agendas, roster of attendees, Leader Manuals, books, pens					
Has available and posts appropriate charts. Each day posts #'s 3, 5, 6, 7, 8, session agenda Day 1 charts 1 through 10 Day 2 charts 11 through 15 Day 3 charts 16 through 24 Day 4 charts 3, 5, 6, 7, 8, and chart from session 1					
Followed the Master Trainer's Manual content and process					
Uses the 'hats on/hats off' (or alternative) appropriately. Explains clearly					
Modeled session activities correctly					
Worked as partner with co-master trainer					
Adhered to timelines					
Limits personal stories that can disrupt both the timelines and detour away from the program as written					
Used brain storming techniques correctly (repeated comment, used silence, offered own response only at end of brainstorm					
Encouraged group participation					
Modeled action planning correctly					
Positively reinforced trainees					

Continued

Checklist

Master Trainer:	Excellent	Good	Fair	Poor	N/A
	Yes	No	No	No	N/A
Handled problem people appropriately					
Room appropriate re: seating, lighting, temperature, ADA, noise and distractions, ability of all trainees to see and hear					
In review section explains the purpose of each activity					
Is able to clearly explain and answer questions about the content and rationale of Stanford's self-management program, and the requirements to ensure the program is offered with fidelity					
Each day allows time for questions, and for sharing information about local program coordination (see day 4 afternoon addendum for complete list).					

Comments:

Signature of Observer _____

Living Well Leader Training Fidelity Checklist Day 1 Morning Addendum

Checklist					
Master Trainer:	Excellent	Good	Fair	Poor	N/A
	Yes		No		N/A
Modeling During introduction, models by stating name, position, and one interesting thing about self					
Explains to trainees to introduce self, state what brought them to training, and share one interesting thing about themselves					
Clearly explains the history, assumptions, and processes of the program, and methods for improving self efficacy <ul style="list-style-type: none"> • goal setting and action plans • modeling • reinterpreting symptoms • persuasion 					
Emphasizes the standardization of the program and the requirement that it is presented as written without changes					
Clearly explains the “hats on/hats off” procedure(or other visible alternative) meaning and how it is used					
Correctly models the introduction to session 1; briefly listing 2 or 3 problems					
Relates problems identified by the trainees to the overview					
Chart used to explain parts of an action plan					
Reads the “lemon” exercise without rushing – slowly and clearly with appropriate pauses					
Clearly explains the symptom cycle and tool box					
Explains the brainstorm thoroughly, (using examples such as the popping of popcorn) if needed. No discussion, just tossing up ideas					

Continued

Checklist

Master Trainer:	Excellent	Good	Fair	Poor	N/A
Day 1 Morning	Yes		No		N/A
<p>Master trainers have differing action plans prepared and modeled correctly:</p> <ul style="list-style-type: none"> • related to behavior • achievable and not intimidating • action specific • not every day • correctly explains the meaning of confidence level and the purpose of having it 7 or greater 					
<p>Correctly models guiding trainees in developing action plans</p> <ul style="list-style-type: none"> • uses chart to point out steps as trainees share their plans • points out use of the word “will” if trainee uses try, should, want, think • helps identify barriers if confidence level is less than 7 • asks the group for suggestions before the leaders 					

Comments:

Signature of Observer _____

Living Well Leader Training Fidelity Checklist Day 1 Afternoon Addendum

Checklist					
Master Trainer:	Excellent	Good	Fair	Poor	N/A
	Yes		No		N/A
Specifies writing or journaling and physical exercise for dealing with difficult emotions					
Clearly explains dealing with difficult emotions and differentiates between the emotion itself and the cause of the emotion					
Has practice teaching assignment prepared, 2 sets if for a large group					
Clearly explains the purpose of the practice teaching activity and the expectations <ul style="list-style-type: none"> • charts • divide the activity but be prepared for the entire activity • following the manual • time frame • role of other trainees during the activity • evaluation forms 					
Explains the meaning of graphics in the leader's manual and the use of special notes and italicized material					

Comments:

Signature of Observer _____

Living Well Leader Training Fidelity Checklist Day 2 Morning Addendum

Checklist					
Master Trainer:	Excellent	Good	Fair	Poor	N/A
	Yes	No	No	No	N/A
Asks for questions and provides explanation with rationale					
Describes activities to be covered					
Clearly explains the purpose and importance of feedback and problem solving process					
Compliments appropriate action plan adjustment/modification					
If action plan not achieved, asks if help wanted from the group Models problem solving steps					
Correctly demonstrated pursed lip and diaphragmatic breathing technique					
Creates an environment conducive to relaxation exercise					
Color codes for fatigue and pain					
Clearly explains establishing exercise baseline with time and/or distance examples					
Correctly demonstrates exercise with one MT standing and marching and the other sitting and leading an orchestra					
Assures that trainees demonstrate breathing correctly					
Explains actions if participant objects to the relaxation exercise					
Uses the tape/CD or reads the relaxation exercise (use the opposite with Guided Imagery to demonstrate both methods)					
After the brain storming on pain and fatigue, informs of the actual depressant and sleep disturbing effects of alcohol if mentioned as a way to deal with pain or fatigue					

Continued

Comments:

Signature of Observer _____

Living Well Leader Training Fidelity Checklist Day 2 Afternoon Addendum

Checklist					
Master Trainer:	Excellent	Good	Fair	Poor	N/A
	Yes		No		N/A
Presents information on where to locate Advance Directives in the community, and points out chapter in the book for more detailed information					
Prepares practice teaching feedback forms for each trainee					
Explains the purpose of practice teaching					
Explains observation of: <ul style="list-style-type: none"> • adherence to content and process • effective modeling • use of problem solving • handling problems 					
Appoints a time keeper					
Explains the role of the other trainees					
Separates the group if needed due to size					
Offers constructive feedback and completes the form. Shares the form if requested					
If the master trainer has concerns as a result of a trainees first practice teaching, the master trainers finds a way to address it with the trainee (eg. personal discussion, telephone contact). This allows the trainee the opportunity to correct/change the area of concern in order to lead the program effectively					

Comments:

Signature of Observer _____

Living Well Leader Training Fidelity Checklist Day 3 Morning Addendum

Checklist					
Master Trainer:	Excellent	Good	Fair	Poor	N/A
	Yes		No		N/A
Asks for questions and provides explanations with rationale					
Describes activities to be covered					
Describes healthy eating not as dieting but making small changes					
Mentions both under and over weight					
Clearly explains “I” messages					
During problem solving activity mentions problems with communication					
Keeps problem solving exercise reports concise <ul style="list-style-type: none"> • statement of problem • asks for up to 3 ideas • states idea choice • checks with partner for correctness 					
Includes italicized information for medication and informed treatment decisions (Evaluating Treatments).					
Reminds trainees that participants should not be allowed to sell or share products, and that Leaders should stop it quickly if it occurs.					
Points out to trainees that during the Treatment Decisions activity participants might try to urge specific treatments to others. This is not allowed during the session, and Leaders can suggest that such discussion occur only during the break.					
Notes need for professional treatment for severe depression					
Uses symptom cycle to describe impact and development of depression from different points on the cycle					
Checklist					
Master Trainer:	Excellent	Good	Fair	Poor	N/A

Day 3 Morning	Yes	No	N/A
In review of problem solving activity, emphasizes that leaders offer suggestions only after the group participation			

Comments:

Living Well Leader Training Fidelity Checklist Day 3 Afternoon Addendum

Checklist					
Master Trainer:	Excellent	Good	Fair	Poor	N/A
	Yes	No	No	No	N/A
Allows time for trainees to suggest changes for negative statements					
Has prepared negative thoughts if needed					
Uses the tape/CD or reads the Guided Imagery (used the opposite with relaxation exercise to demonstrate both methods)					
Explains not allowing sharing of favorite medications or products, referring discussion to break time					
Clearly explains the difference between positive thinking as a cognitive technique to change thinking, and distraction as an activity to keep our minds from thinking about symptoms					
Explains the use of alternative Guided Imagery script in the book and emphasizes not using other scenarios that are not part of the Stanford program					
Clearly defines the difference between health care organization and health care provider					
Points out “doctor bashing” not allowed and names not be used					
Clearly models 3 to 6 month plan					
Has chart from session 1 readily available and identifies the differences in the problems listed now					

Comments:

Living Well Leader Training Fidelity Checklist Day 4 Morning Addendum

Master Trainer:	Excellent	Good	Fair	Poor	N/A
	Yes		No		N/A
Explains the purpose of the feedback and problem solving activity					
Compliments appropriate action plan adjustment/modification					
If action plan not achieved, asks if help wanted from the group Models problem solving steps					
Has prepared the four full sets of cards for “Handling Situations in Group”					
Clearly explains the purpose of the exercise					
Clearly explains the roles of the leaders and participants in playing assigned roles, and the role of the observing group					
Divides into 2 groups, sitting in inner and outer circles					
Uses the action plan activity for group 1, feed back on action plans for group 2					
Gives leaders time to coordinate and prepare					
Times the activity for 5 minutes					
Repeats the activity as time allows					
Ask groups what they learned					
Points out appendix III in manual					
Practice teaching conducted partly in the morning and completed after lunch					
Explains the purpose of practice teaching					
Prepares practice teaching feedback forms for each trainee					

Continued

Checklist

Master Trainer:	Excellent	Good	Fair	Poor	N/A
Day 4 Morning	Yes		No		N/A
Explains observation of: <ul style="list-style-type: none"> • adherence to content and process • effective modeling • use of problem solving • handling problems 					
Appoints a time keeper					
Explains the role of the other trainees					
Separates the group if needed due to size					
Offers constructive feedback and completes the form. Shares the form if requested					

Comments:

Signature of Observer _____

Living Well Leader Training Fidelity Checklist Day 4 Afternoon Addendum

Checklist					
Master Trainer:	Excellent	Good	Fair	Poor	N/A
	Yes		No		N/A
Practice teaching conducted partly in the morning and completed after lunch					
Explains the purpose of practice teaching					
Prepares practice teaching forms for each trainee					
Explains the observation of: <ul style="list-style-type: none"> • adherence to content and process • effective modeling • use of problem solving • handling problems 					
Appoints a time keeper					
Explains the role of the other trainees					
Separates the group as needed for size					
Offers constructive feedback and completes the form. Shares the form if requested					
Congratulates all					
Asks trainees to write down 2 things they are afraid might happen					
Asks trainees to share one thing they are afraid might happen, discusses and deals with concerns					
Writes down on board or easel any solutions developed in a brainstorm					
Explains “Looking Back and Planning for the Future,” noting that in the program the review is over the six weeks (although now review is over the days of the training)					

Continued

Checklist

Master Trainer:	Excellent	Good	Fair	Poor	N/A
Day 4 Afternoon	Yes		No		N/A
Local coordinator explains: <ul style="list-style-type: none"> • specifics about the program • responsibilities • site selection • publicity and recruitment • registration and fees, if any • how assignments are made, and authorization of new leaders after first program • materials • paperwork (participant information, program summary and importance of collecting these forms) • state list serve • state network and forum 					
Distributes and collects evaluations					
Gives out completion certificates					
Offers thanks and congratulations					
If the master trainers have doubts about the ability of a trainee to co-lead programs, concerns are documented and discussed with the local program coordinator					

Comments:

Signature of Observer _____