

Oregon Living Well Network
Quality Assurance & Fidelity Workgroup

August 20, 2009 from 9-10 am

Beverly Cridland, Gerontology Institute
Carole Kment, Samaritan Health
Julia Lager-Mesulam, OHSU Partnership Project
Betty Landis, Community Connections
Janna Liewergen, Silverton Hospital
Bernadette Maziarski, OSU Extension
Cynthia Swanson, MVIPA
Cara Biddlecom, DHS Public Health
Jennifer Mead, DHS Seniors & People with Disabilities

Update from Bernadette on Stanford Fidelity Efforts

Bernadette reports that Stanford has been piloting a new 45-minute segment of the Leader training curriculum linked to the practice teaching that would focus on maintaining program fidelity. Stanford hopes to have a new fidelity guide out “soon”; the guide will include feedback from the Nat’l Council on Aging Quality Assurance and Fidelity workgroup.

The group discussed when Leaders should be considered licensed or certified, with Bernadette letting the group know that Stanford doesn’t consider a Leader certified until they’ve been observed leading their first workshop. Carole noted this seemed a better final way to assess Leaders as they may be too nervous during the training. However since this doesn’t currently seem to be clearly stated in Stanford’s written materials, it will be helpful when Stanford releases their fidelity/quality guide.

Bernadette also provided a brief overview of the British “Expert Patient” CDSMP program – that uses different titles for Leaders, MTs, and T-Trainers – and relies entirely on unpaid volunteers to lead programs.

Fidelity Checklists

Update and discussion on where the group stands with the various checklists:

- **English** – Have checklists and recommendations completed for workshops and Leader training, and a question included on the Program Summary form asking if workshops have been observed. Copies of these forms are being provided with new Leader trainer manuals. *Bernadette* will send copies of these to Stanford to let them know what we’ve developed.

- **Tomando** – Workshop checklist is in final review. *Cara* is getting feedback as part of the Tomando training currently occurring, and *Beverly* will include final changes. *Beverly* reports that the Leader training checklist, and guidelines for use of both forms are being worked on, and may be ready to share with the group by the next call.
- **PSMP** – Julia reported that Lauren Nathe, PSMP Master Trainer, will be testing out the workshop checklist during a program this fall. With fewer PSMP Leaders and MTs, the observation checklists may more often be used as a self-checklist by the two Leaders or MTs in PSMP programs and training. *Julia* will make sure the initial Living Well page is appropriate to go with the 7-session addenda that Lauren has developed. *Julia* will also share the form with Annick Benson, and will talk with Lauren about developing a PSMP Leader training (5th day of training) observation checklist. *Jennifer/Cara* will get the PSMP workshop observation checklist up on the website once Julia's reviewed and approved the initial page.

Role of Network in Ensuring Fidelity

The group began an initial conversation – to be continued on our next call – of what the Network's role may be when organizations are not following the program as designed. Examples of alterations included:

- Providing the workshop with fewer than 8 people
- Providing Leader training with fewer than 8 people
- Leaders/MTs not facilitating workshops or training at least once/year
- Leader training being offered in 3 days or other more condensed versions
- Additional material being included in the workshops as handouts
- Additional content being offered in conjunction with workshops – i.e. additional educational sessions provided immediately before or after workshops

Initial discussion focused on concerns that adjustments to the basic program affect the credibility of the statewide program. Suggestions and comments included:

- Fidelity needs to be the responsibility of the licensed organization and/or program coordinator from the licensed organization.
- Addition of non-self-management activities like prayer may be acceptable if it's done after the workshop is clearly over and when workshops are held for specific groups (i.e. only church members).
- Stanford should be the ultimate source of answers on these questions. We can call or email Stanford for answers on specific situations; however it'll be

even more helpful to have some answers clearly defined so that everyone has the same information.

- The QA/Fidelity workgroup may be able to serve as a state-level group to help think through questions and provide consultation on fidelity.
- Ensuring program fidelity ultimately impacts the ability for programs across Oregon to be reimbursed by health insurers and other funders.
- Issues related to program fidelity should be addressed with the licensed organization. The function of the QA/Fidelity workgroup and the Oregon Living Well Program is not to inform Stanford of fidelity breaches.

The group agreed to continue to think through options on our next call.

Next calls: October call – and perhaps December call – will have to be rescheduled. Jennifer will send out options to the group soon.