Oregon Living Well Leader Training Fidelity Checklist
Overall Issues for All Training Days

Please evaluate each Master Trainer on the following criteria, checking off items that are completed successfully, and providing comments to help Master Trainers improve on areas that may be skipped or not addressed adequately.

This checklist includes observation items for all days of Leader training to help Master Trainers be sure to address critical aspects of training. However, it is highly recommended that observation by an external observer occur on Day 2.

Date: _____ Training Day Attended: _____

Master Trainer: _____ Observer: _____

Site Name: _____ Number of Trainees: _____

Overall Observation Issues	Comments
__ Arrives 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 __ Room appropriate re: seating, lighting, temperature, ADA, noise and distractions, ability of all trainees to see and hear	
__ Has available and posts appropriate charts. • Each day posts charts 2 through 7; and session agenda • Day 1 charts 1 through 9 • Day 2 charts 10 through 14 • Day 3 charts 15 through 25 • Day 4 charts 2 through 7; chart from session 1	
__ Follows the Master Trainer's Manual content and process __ Uses the 'hats on/hats off" (or alternative) appropriately. Explains clearly __ Models session activities correctly __ Adheres to timelines __ Limits personal stories that can disrupt both the timelines and detour away from the program as written __ Works as partner with co-master trainer	

Overall Observation Issues, continued	Comments
__ Presentation style is appropriate – articulate, eye contact, inflection. __ Encourages group participation __ Positively reinforces trainees __ Handles problem people appropriately	
__ Uses brain storming techniques correctly (repeated comment, used silence, offered own response only at end of brainstorm, read back list to group and asked for any needed clarifications at the end of the brainstorm) __ Models action planning correctly	
__ 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).	
__ Appropriately uses 'call outs' during session reviews. __ Effectively uses 'what if' scenarios: • Does not call on same trainee twice until all trainees have participated • Provides correct answers after trainees responded (if applicable) • Uses participation log	
__ Clearly follows guidelines for practice teaching __ Responds to questions by modeling problem-solving when applicable __ Uses parking lot for questions that can be answered later	

Overall comments, suggestions or feedback:

Oregon Living Well Leader Training Fidelity Checklist
Day 1 Morning

Day 1 – Morning Observation Issues	Comments
__ 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 • 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	
__ Reviews Chart 1 – Expected Skills __ Introduces 'Parking Lot' concept and necessity of completing all training activities __ Clearly explains the "hats on/hats off" procedure (or other visible alternative) meaning and how it is used	
__ Explains 'Introduction to Workshop' section clearly __ 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 tool box __ Explains the brainstorm thoroughly, (using examples such as the popping of popcorn) if needed. No discussion, just tossing up ideas	
__ Explains 'Getting a Good Night's Sleep' section clearly __ Brainstorms appropriately	

Overall Observation Issues, continued	Comments
__ Master trainers have differing action plans prepared and modeled correctly: • 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 __ Correctly models guiding trainees in developing action plans • 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	

Other comments, suggestions or feedback:

Oregon Living Well Leader Training Fidelity Checklist
Day 1 Afternoon

Day 1 – Afternoon Observation Issues	Comments
__ Reviews Session 1 and answered questions appropriately __ Explains concept of 'say in your own words' and use in materials __ Uses scenario and brainstorming log __ Uses appropriate 'what if' x 2 __ Uses 'shout out' questions __ Explains that future brainstorming will be used as practice session.	
__ 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 __ Brainstorm is performed by two trainees	
__ Introduces 'Physical Activity and Endurance,' and uses two different brainstorming trainees. __ Introduces 'Preventing falls and Improving Balance,' and uses 2 different brainstorming trainees.	
__ Has practice teaching assignment prepared, 2 sets if for a large group, and uses recommended teaching assignments. __ Clearly explains the purpose of the practice teaching activity and the expectations • 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	
__ Does Session 2 review, using 'shout out', 'what if' and records on log. __ Explains the meaning of graphics in the leader's manual and the use of special notes and italicized material	

Other comments, suggestions or feedback:

Oregon Living Well Leader Training Fidelity Checklist
Day 2 Morning

Day 2 – Morning Observation Issues	Comments
__ 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 __ MT uses 'Feedback Flow Chart' as needed __ If action plan not achieved, asks if help wanted from the group. __ Models problem solving steps __ Make Action Plans. Both leaders participate: one leads group, the other points to chart	
__ Explains 'Making Decisions' clearly. One leader points to chart as other explains material __ Explains 'Pain and Fatigue Management' clearly. One leader uses different colors during brainstorms __ After the brainstorming on pain and fatigue, informs participants of the actual depressant and sleep disturbing effects of alcohol, if mentioned during brain storm as a method of dealing with pain or fatigue	
__ Explains 'Endurance Exercise' clearly __ Clearly explains establishing exercise baseline with time and/or distance examples __ Correctly demonstrates exercise with one MT standing and marching while the other MT is sitting and leading an orchestra	

Other comments, suggestions or feedback:

Oregon Living Well Leader Training Fidelity Checklist
Day 2 Afternoon

Day 2 – Afternoon Observation Issues	Comments
__ Explains options if participant objects to the Body Scan exercise __ Uses the CD or reads the Body Scan	
__ Session 3 review. Uses 'what if' and 'shout out' scenarios. Records on log	

__ Prepares practice teaching feedback forms for each trainee
__ Explains the purpose of practice teaching
__ Explains observation of:
   • Adherence to content and process
   • Effective modeling
   • Use of problem solving
   • Handling problems
__ Appoints timekeeper or one MT performs duty
__ Separates group if needed due to size	

__ Clearly delivers instructions for practice teaching __ While observing practice teaching, makes sure that each trainee has adequate time to facilitate __ Uses 'feedback sandwich' technique __ Identifies problem areas by providing clear, constructive feedback __ Documents any serious fidelity issues __ If the MT has concerns as a result of a trainee's first practice teaching, the master trainers find a way to address it with the trainee (ie. private personal discussion or telephone contact) This allows the trainee the opportunity to correct/change the area of concern in order to lead the program effectively	
__ Distributes 2nd practice teaching assignments using the recommended sessions	

Other comments, suggestions or feedback:

Oregon Living Well Leader Training Fidelity Checklist
Day 3 Morning

Day 3 – Morning Observation Issues	Comments
__ Asks for questions and provides explanations with rationale __ Describes activities to be covered	
__ Explains 'Better Breathing' section clearly, correctly demonstrating pursed lips and diaphragmatic breathing techniques. Brainstorm conducted by 2 different trainees and documented on log.	
__ Describes healthy eating not as dieting but making small changes __ Mentions both under and over weight __ Clearly explains 'Plate Method' __ Conducts 'shout out' regarding variety question __ Guides trainees effectively through finding food information in book.	
__ Clearly explains "I" messages	
__ During problem solving activity mentions problems with communication	
__ Keeps problem solving exercise reports concise • Reminds trainees to tell workshop participants to 'please keep reports short' • Includes statement of problem • Asks for 1-2 solutions you came up with • States ideal choice • Checks with partner for correctness	

Other comments, suggestions or feedback:

Oregon Living Well Leader Training Fidelity Checklist
Day 3 Afternoon

Day 3 – Afternoon Observation Issues	Comments
__ Session 4 Review: uses 'shout out', brainstorm and 'what if' scenarios; reports on log	
__ Explains 'Making Healthy Food Choices' clearly; one leader stands at the chart. Conducted 'shout out' regarding guideline chart __ Guides trainees through book exercise __ Conducts 'shout out' on labels __ Is prepared with extra labels if trainees forgot to bring their own	
__ Explains 'Medication Usage' clearly __ Chooses 2 trainees for brainstorm; used log	
__ Explains 'Making Informed Treatment Decisions' clearly __ Writes URLs on board or chart paper __ Points to each address and explains	
__ Explains 'Dealing with Depression' clearly. __ Uses symptom cycle chart __ Chooses 2 trainees for brainstorm; uses log - for 2 brainstorms in segment	
__ Explains 'Positive Thinking' clearly __ Allows time for trainees to suggest changes for negative statements __ Has examples of negative thoughts, if needed __ Uses a different color pen for positive and negative comments __ Allows time for trainees to reflect on something positive about themselves	
__ Session 5 Review: uses 'shout out and 'what if' scenarios; reports on log	
__ Explains 'Working with Your Health Care Professional & Health Care Organization' clearly __ Defines the difference between health care organization and health care provider __ Points out 'doctor bashing' not allowed and names not used __ Chooses 2 trainees for brainstorm; uses log – for 2 brainstorms in segment	

Other comments, suggestions or feedback:

Oregon Living Well Leader Training Fidelity Checklist
Day 4 Morning

Day 4 – Morning Observation Issues	Comments
__ Provides time for questions and discussion	
__ Explains the purpose of the feedback and problem solving activity __ Responds to each participant using the Feedback Flow Chart	
__ Explains 'Weight Management' clearly __ Allows time for trainees to volunteer their observations of food diary __ Describes weight management not as dieting but making small changes __ Mentions both under and over weight	
__ Reviews 'Looking Back and Planning for the Future' __ Clearly models 3 to 6 month plan	
__ Session 6 review; uses 'shout out' and 'what if' scenarios; records on log __ Provides time for questions and discussion	

Other comments, suggestions or feedback:

Oregon Living Well Leader Training Fidelity Checklist
Day 4 Afternoon

Day 4 – Afternoon Observation Issues	Comments

__ Prepares practice teaching feedback forms for each trainee
__ Explains the purpose of practice teaching
__ Explains observation of:
  • Adherence to content and process
  • Effective modeling
  • Use of problem solving
  • Handles problems
__ Appoints timekeeper or one MT performs duty	

__ Clearly delivers instructions for practice teaching __ While observing practice teaching, makes sure that each trainee has adequate time to facilitate __ Uses 'feedback sandwich' technique __ Identifies problem areas by providing clear, constructive feedback __ Documents any serious fidelity issues __ If the MT has any doubts about the ability of a trainee to be an effective Leader, the trainer should document the reasons in writing on the forms; talk with trainee and the self-management program director or coordinator	
__ Congratulates all the trainees __ Second Practice Teaching Review	
__ Explains importance of Program Fidelity __ Review expected skills for leaders	

__ Training Evaluation, Next Steps, Certifications of Completion
__ Has pre-arranged that local program coordinator is present for this activity
__ Local coordinator explains:
  • Responsibilities of Leader
  • Site selection, publicity and recruitment
  • Registration and fees, if any
  • How assignments are made, and authorization of new leaders after first program
  • Materials
  • Paperwork (emphasize importance of participant information, attendance, program summary)
  • State listserve, Living Well Network, annual Forum	

Overall Observation Issues, continued	Comments
__ Allows for final questions __ Distributes (if not done previously) and collects Leader Training Evaluation forms	

Other comments, suggestions or feedback: