

Addressing Leader Quality and Counseling Out Inappropriate Leaders

This section is taken directly from pages 16-18 of Stanford Self-Management Program Fidelity Manual (May 2010). <http://patienteducation.stanford.edu/licensing/FidelityManualOct2011.pdf>

*****While focused on fidelity and counseling out during initial Leader training, please note that these same guidelines can be used for counseling out a Leader after they have facilitated one or more workshops.***

The Special Role of Practice Teaching and Fidelity

Practice teaching is one of the best times to observe and document desired skills for Leaders. Master Trainers should have specific check lists for each activity assigned for practice teaching to ensure that all trainees are evaluated by similar criteria. This is a new protocol started in 2010 and thus many Master Trainers may not have the checklists. They can be found in the Tool Kit.

While not everyone will totally agree with the philosophy of the Stanford programs as outlined on pages 4-5 it is important that they do not compromise the program by acting on these differences.

The following are ways of spotting actions which may be based on philosophical differences:

- Leader is too judgmental and didactic: tell participants they are wrong and tell them what to do and how to do it.
- Leaders force participation – put participants on the spot – direct questions to individuals in an authoritative manner.
- Leaders use guilt and intimidation as motivators.
- Leaders assume participants do not know anything, know very little or the information they have is wrong. Leaders believe class participants need to be educated.
- Leaders directly challenge participants' beliefs instead of allowing new information to sink in and social persuasion to take place.
- Leaders are not knowledgeable, sensitive and respectful of cultural practices and beliefs
- Leaders see themselves as experts – give most of the answers; do not listen or make an effort to understand the participants' motives and realities.
- Leaders want to use other material, other facilitating methods or technology-driven practices.
- Leaders are not open to feedback from peers, Master Trainers or program coordinator.
- Leaders are not open to change or improve the delivery of the workshops.

Leader Training Nice to Do's

- Develop certification standards for Leaders/Trainers in your local program that enhance the standard CDSMP training protocol.
- Offer annual meeting for Leaders to share issues and strategies for leading the workshops.

Counseling Leader Out of Program Must Do's

Sometimes it is necessary to not let a potential Leader or Master Trainer to continue with the program. To qualify for certification and to maintain it, one must not only deliver the program as written but also demonstrate that their delivery style reflects program beliefs as outlined above. If a trainee does not qualify to be a Leader they must be given a written and verbal reason for this decision. This can be difficult. The following are guidelines for Master Trainers and program coordinators. *Please note that these same guidelines can be used for counseling out a Leader after they have facilitated one or more workshops.*

- Have a fidelity plan in place.
- Observe and document problem behaviors. The first practice teaching is a good opportunity. However, you can pick up problems at any time. Just be sure that you have specific details. You will need these as you do your counseling.
- Counseling should always be done in private NEVER as part of the group. You may include your Co-Trainer.
- Always be respectful and considerate.
- Give the trainee specific reasons and examples of why you are concerned.
- Focus on performance, behavior and use of the manual.
- Tell the trainee what they did well, but also tell them clearly how they are expected to improve.
- Tell the trainee what will happen if they do not improve by Practice Teaching # 2 so there will be no surprises.
- Do not get caught in emotional battles or excuses. Use a broken record approach for example: "I am sorry but you did not follow the manual in either of your practice teaches" an emotional response follow and then you say "I am sorry but you did not follow the manual in either of your practice teaches"
- If in doubt about a trainee, then do not let them continue. It is not kind to the future participants, the trainee or his/her supervisor to "pass" a marginal person
- As a gut test, ask yourself if you would be willing to sit through six weeks of classes facilitated by this person. If the answer is anything but 'yes', it is best to maintain program fidelity and counsel the person out.
- If ever you are in doubt, **DO NOT ALLOW THE TRAINEE TO LEAD WORKSHOPS !**

Master Training Must Do's

- Have a fidelity plan in place.
- Training must be at least 27 hours usually offered over 4.5 days.
- Training must be offered by two Certified T-Trainers.
- In determining whether or not to recommend a trainee for Master Trainer Certification, T-Trainers use the criteria as those for a Leader with the following added considerations:
 - They can successfully give feedback during practice teaching. See previous page.

- They can embrace the underlying philosophy of the program (Self-Management, Self-Determination, Self-Efficacy, Community-Based Health Education).
- They can identify strengths, weaknesses and areas of improvement for each trainee and themselves.
- They can facilitate constructive discussion / feedback with peers.
- They can think quickly on feet. That is, they are quick to respond to situations that arise and respond in an appropriate manner according to stated guidelines
- They have sound judgment. When faced with a new situation they act in a manner that maintains program fidelity, the confidence of the group and the integrity and safety of the participants.
- They demonstrate a clear command of material.
- They act as a hyper-model. Almost over model everything so that you see it coming back in practice teachings.
- Adhere to training process (minimum and maximum of attendees, follows activities in the manual).
- Understands and agrees with the importance of Program Fidelity.

Note that some of the above are difficult to quantify and thus they are given as considerations and points to look for when considering fidelity.

- In counseling a trainee use the same criteria as for Leader counseling see page 17
- If the T-Trainers feel that an individual cannot be a Master Trainer but has met all the qualification for Leader, then the T-Trainers can recommend the person become a Leader.
- If ever you are in doubt, **DO NOT ALLOW THE TRAINEE TO LEAD WORKSHOPS or CONDUCT TRAININGS!**