

## **Oregon Living Well**

### **Recommended Use of Leader Training Fidelity Checklist**

When asked about program quality, Kate Lorig at Stanford University has stated that the training of Leaders models the program and facilitation that will then be replicated by the new Leaders in all the workshops they lead. Ensuring quality and fidelity of programs begins with the training of program Leaders. The recommendations below propose how the Living Well Leader Training Fidelity Checklist can be used to help ensure the fidelity and effectiveness of training.

#### **A. Fidelity observation process**

1. Observation and completion of checklist should be done by a T-Trainer or Master Trainer, or an experienced Leader if other options are not possible. The observer should be experienced with the program and able to provide constructive feedback in a positive way. Trainings that do not have access to an observer can email the Oregon Living Well team at [living.well@state.or.us](mailto:living.well@state.or.us) to see if there are individuals in their area who might be able to observe the training.
2. If there is no observer available, co-trainers may use the checklist together as a review to ensuring quality and fidelity of their training. If trainers are using the checklist without an external observer, they are encouraged to use the entire checklist (all 4 days) and to set aside time at the end of each day to review the checklist sections for that day.
3. It is recommended that every Leader training be observed for one half day. If possible, the half-day segments that would be most useful for an external observer to monitor are:
  - Day 2 morning (action plan reporting)
  - Day 2 afternoon (1<sup>st</sup> practice teach)
  - Day 4 morning (2<sup>nd</sup> practice teach & fishbowl/handling difficult situations session)

#### **B. Fidelity observation logistics**

4. The observer should let the Master Trainers know at least one week before the training begins when he/she plans to attend & observe the training, and should share a copy of the checklist with the Master Trainers in advance. Master Trainers should ask their group if they would be willing to be observed, and explain to the group how observation helps ensure that programs are as

effective as possible. This also provides an opportunity for the Master Trainers to discuss (and model) the process for fidelity observation of community programs. The group should be informed that the observer is held to the same standard of confidentiality as the Master Trainers and the group members. If there is real concern about observation, Master Trainers should discuss this with the observer and consider not observing this particular group.

5. The observer should arrive before the program begins, or at the lunch break, and stay through the full half-day session. If this is not possible, the observer should plan to arrive or leave during the break, but not during other parts of the session. The observer should be introduced briefly to the group, and should sit in the back of the room, not joining in as a participant.
6. The observer should use one checklist for each Leader. The checklist helps to identify program logistic issues, and Leader strengths and possible areas for improvement. The observer is also encouraged to provide comments that will help the Leader – positive feedback on strong areas, and suggestions for possible improvements.

### **C. Fidelity observation follow-up**

7. If possible, the observer should follow up with Master Trainers immediately after observation to share the feedback – using the feedback process used in Leader training and asking the Master Trainers to speak first about how they felt the session went. If it is not possible for the observer to talk immediately with the Master Trainers, feedback should be provided by the observer or coordinator as soon as possible in person or by phone. The checklist should be returned to the coordinator or lead contact at the licensed organization, and a copy of the checklist should be provided to each Master Trainer.
8. Effective and appropriate Leader training is critical to the success of the Living Well program. If there are real concerns with the role of a Master Trainer, steps need to be taken immediately to ensure future trainings are improved. Potential steps that the observer, Master Trainer, and coordinators may consider include:
  - Discuss concerns directly with the Master Trainer, and determine if there are specific steps the Master Trainer can take to address the concerns.
  - Have the Master Trainer re-observed again soon (if possible, observing another segment of the same Leader training) to ensure that recommended changes have been made. If it's not possible to observe another portion of the same training, it may be helpful to observe the

Master Trainer leading a community workshop, since this involves similar skills and tasks as are involved in Leader training.

- Have the Master Trainer work with two other experienced Master Trainers (as a 3<sup>rd</sup> trainer) in facilitating a Leader training before being asked to co-train again.
- Consider not using this Master Trainer for future Leader trainings.