

## 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:** \_\_\_\_\_

<b>Checklist</b>			
	<b>Yes</b>	<b>No</b>	<b>N/A</b>
Arrived on-time for set up, start time & prepared to lead session with appropriate materials. Materials include: Name tags, hats or alternative, easels/markers, 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 #'s 3, 5, 6, 7, 8, session agenda			
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 timelines and detour away from the program as written			
Used brain storming techniques correctly –repeat comment, used silence, contributed only at end of brainstorm			
Encouraged group participation			
Modeled action planning correctly			
Positively reinforced trainees			
Handled problem people appropriately			
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			
Explains the meaning of graphics in the leader's manual and the use of special notes and italicized material			

<p>Master trainers have differing action plans prepared and modeled correctly:</p> <ul style="list-style-type: none"> <li>• related to behavior</li> <li>• achievable and not intimidating</li> <li>• action specific</li> <li>• not every day</li> <li>• correctly explains the meaning of confidence level and the purpose of having it 7 or greater</li> </ul>			
<p>Correctly models guiding trainees in developing action plans</p> <ul style="list-style-type: none"> <li>• uses chart to point out steps as trainees share their plans</li> <li>• points out use of the word “will” if trainee uses try, should, want, think</li> <li>• helps identify barriers if confidence level is less than 7</li> <li>• asks the group for suggestions before the leaders</li> </ul>			
<p>Has practice teaching assignment prepared</p>			
<p>Clearly explains the purpose of the practice teaching activity and the expectations</p> <ul style="list-style-type: none"> <li>• charts</li> <li>• divide the activity but be prepared for the entire activity</li> <li>• following the manual</li> <li>• time frame</li> <li>• role of other trainees during the activity</li> <li>• evaluation forms</li> </ul>			
<p>Prepares practice teaching feedback forms for each trainee-offers constructive feedback</p>			
<p>Explains observation of:</p> <ul style="list-style-type: none"> <li>• adherence to content and process</li> <li>• effective modeling</li> <li>• use of problem solving</li> <li>• handling problems</li> </ul>			
<p>Includes italicized information for medication and informed treatment decisions (Evaluating Treatments).</p>			
<p>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 during the break.</p>			

In review of problem solving activity, emphasizes that leaders offer suggestions only after the group participation			
Shows comfort with Sex, Intimacy and Disclosure section			
Points out “doctor bashing” not allowed and names not be used			
Explains observation of: <ul style="list-style-type: none"> <li>• adherence to content and process</li> <li>• effective modeling</li> <li>• use of problem solving</li> <li>• handling problems</li> </ul>			
Appoints a time keeper + explains the role of the trainees			
Offers constructive feedback and completes the form. Shares the form if requested			
Local coordinator explains: <ul style="list-style-type: none"> <li>• specifics about the program</li> <li>• responsibilities</li> <li>• site selection</li> <li>• publicity and recruitment</li> <li>• registration and fees, if any</li> <li>• how assignments are made, and authorization of new leaders after first program</li> <li>• materials</li> <li>• paperwork (participant information, program summary and importance of collecting these forms)</li> </ul>			
Distributes and collects evaluations			
Gives completion certificates, thanks + 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 \_\_\_\_\_