

Oregon Living Well

Recommended Use of Fidelity Checklist

Stanford's self-management programs – including Living Well with Chronic Conditions/CDSMP, Tomando Control de su Salud, and Positive Self-Management for People with HIV/AIDS (PSMP) – result in well-documented beneficial health outcomes for participants when the programs are implemented with fidelity. The recommendations below propose how the Living Well Fidelity Checklist can be used by Oregon Living Well programs to help ensure the fidelity and effectiveness of programs.

A. Fidelity observation process

1. Leaders should be told about program fidelity and observation during their initial training (or as soon as fidelity observation is started by an organization), and provided a copy of the Living Well Fidelity Checklist. It should be emphasized that program observation is done to ensure that programs are offered as designed, and that observation helps programs be more effective in achieving proven outcomes – helping Leaders see observation as an opportunity to improve programs and provide helpful feedback rather than something threatening.
2. Observation and completion of checklist should be done by a Master Trainer, or an experienced Leader if a Master Trainer is not available. Observer should be experienced with the program and able to provide constructive feedback in a positive way. Programs that do not have access to an observer can email the Oregon Living Well team at living.well@state.or.us to see if there are individuals in their area who might be able to observe programs. If there is no observer available, co-leaders may use the checklist together as a guide to maintaining fidelity of their programs.
3. Each new Leader should be observed for one session during their first program, and then for one session of a workshop on a regular basis (i.e. at least annually). It is recommended that observation take place during sessions 2-5 (2-6 for PSMP) in order to ensure observation of action-planning, feedback/problem-solving, and brainstorming.

B. Fidelity observation logistics

4. Leaders should be notified by the Master Trainer or program coordinator at least one week in advance that they will be observed. Leaders should ask their

group if they would be willing to be observed, and explain to the group how observation by an experienced Leader or Master Trainer helps ensure that programs are as effective as possible. The group should be informed that the observer is held to the same standard of confidentiality as the Leaders and the group members. If there is real concern about observation, Leaders should discuss this with the observer and consider not observing this particular group.

5. The observer should arrive before the program begins, and stay through the full 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 Leaders immediately after observation to share the feedback – using the feedback process used in Leader training and asking Leaders to speak first about how they felt the session went. If it is not possible for the observer to talk immediately with the Leaders, 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 may also be mailed to the Leader.
8. If there are real concerns, a Leader should be re-observed soon after to ensure that recommended changes have been made. If concerns continue, the Master Trainer should work with the Leader one-on-one to correct the problem and/or consider not using that Leader for future programs.
9. Organizations should develop a system (i.e. Excel spreadsheet or simple checklist) to track that Leaders are each observed initially and at least annually thereafter. It is also recommended that the observer submit completed checklists to program coordinators, who should keep the fidelity checklists on file for at least 2 years.