

## **Healthy Living: Self-Management of Chronic Conditions Workshop**

### **Master Trainers and Experienced Workshop Leaders: Instructions for Coaching Workshop Facilitators**

#### **Standard**

Master Trainers or experienced facilitators will observe the Workshop Leaders/Facilitators who are under their oversight and coordination, at least once, during the first workshop they co-facilitate. Experienced workshop facilitators are Leaders who have facilitated at least two workshops and presented no serious fidelity issues during a fidelity coaching visit.

Additionally, all workshop Leaders and Master Trainers should be observed on a yearly basis to ensure workshop fidelity is maintained.

#### **The Purpose**

The purpose of fidelity coaching is to support Facilitators and share ideas to ensure fidelity. It is an opportunity to strengthen the facilitator/lay leader model and to maintain the quality of the Healthy Living program.

#### **Forms**

- This instruction sheet details the process for the observer or fidelity “coach.” The checklist is the tool used to conduct the observation.
- The Healthy Living Workshop Checklist Summary, a step by step guide for delivering the program, includes a summary page **and** a sheet for each of the 6 sessions.
- The following documents should be sent to the Workshop Facilitator(s), in advance of the visit:
  - the “Workshop Checklist Summary” sheet including the “Fidelity Checklists” for all six sessions
  - the “Workshop Facilitator: Overview of a Fidelity Coaching Visit” document which explains the process for the Facilitator.
- If you are observing both Workshop Facilitators:
  - Bring four copies of the summary page (two for you to keep and one for each Facilitator)
  - Bring two copies of the checklist for the specific session observed (you will keep both copies, but you need one for each Facilitator)

## **The Process**

1. Sessions 2, 3, 4, or 5 are best for observation. Stanford suggests not observing on session 1 or 6.
  2. Arrange in advance to attend a specific session. Plan for additional time after the session or at another date to review the summary sheet. Do NOT show up unannounced.
  3. Ask the Workshop Facilitator to inform the group in advance that someone will attend to observe the Facilitator. Emphasize that this person is strictly there to observe, not to participate or be called upon as an “expert”.
  4. The role of the coach is observation only; do not participate in the session.
  5. Ask the Workshop Facilitator to introduce the Fidelity Coach, whose role is to observe the Facilitator.
  6. Use a separate summary sheet for each Workshop Facilitator.
  7. Complete the summary sheet during the session
  8. Provide a summary sheet for the Workshop Facilitator to take notes on during the session review.
  9. Review the summary sheet with the Workshop Facilitator after the session or at another pre-arranged time.
  10. Once the observation session has been discussed, both the Workshop Facilitator and the Coach will sign the original copy of the summary sheet.
  11. The Coach will maintain the signed summary sheet for each Workshop Facilitator and forward by fax or scanned email to the Institute for record keeping.
- \*\* If at any time concerns emerge regarding the ability of a Facilitator to lead a workshop or any other concern, these concerns should be discussion in private. Additionally, these concerns should be documented.