

Healthy Living: Self-Management of Chronic Conditions Workshop Checklist Summary (2012 Curriculum)

Date: _____
 Workshop Leader: _____
 Site Name: _____

Session Attended: session # _____
 Observer: _____
 Number of participants in class: _____

Skills	Comments/Suggestions
<p><u>Class Prep</u></p> <p>___ Arrived on time with materials/charts. ___ Room appropriate: protecting confidentiality, seating arranged in a “U” or circle, lighting, temperature, ADA, noise and distractions, ability of all trainees to see and hear, charts are legible handwriting, dark colored marking pens, easily readable</p>	
<p><u>Delivery of Workshop</u></p> <p>___ Follows the curriculum as scripted in the Lay Leader Manual ___ Clearly explained topics and activities ___ Presentation style appropriate; articulate, eye contact, inflection ___ Modeled activities correctly ___ Positively reinforced participants</p>	
<p><u>Group Interaction</u></p> <p>___ Encouraged group participation ___ Limited personal stories ___ Handled problem people effectively ___ Adhered to timelines ___ Worked well as a partner with co-leader</p>	
<p><u>Brainstorming</u></p> <p>___ Encouraged to produce as many ideas as possible ___ Repeated ideas ___ Reminded group not to comment on ideas ___ Did not allow discussion/questions ___ Used silence ___ Person writing not leading activity ___ Offered own response only at end ___ Reviewed the list by reading ideas ___ Provided opportunity for clarification</p>	

<p><u>Action Planning</u></p> <p><input type="checkbox"/> Used chart to point out steps as trainees shared their action plans</p> <p><input type="checkbox"/> Pointed out “will” if participant used try, should, want or think</p> <p><input type="checkbox"/> Helped identify barriers if confidence level is less than 7</p> <p><input type="checkbox"/> Asked the group for suggestions before the leaders offered responses</p>	
<p><u>Feedback/Problem Solving</u></p> <p><input type="checkbox"/> Asked person to state their action plan and success/problems</p> <p><input type="checkbox"/> Complimented appropriate action plan adjustment/modification</p> <p><input type="checkbox"/> If problems, what barriers existed and did they try a solution?</p> <p><input type="checkbox"/> Asked person if they would like help</p> <p><input type="checkbox"/> Asked for a show of hands if they have the same/similar problem</p> <p><input type="checkbox"/> Conducted brainstorm appropriately</p> <p><input type="checkbox"/> Limited to 3 ‘yes buts’</p> <p><input type="checkbox"/> Recommended person make a note of suggestions offered</p>	
<p><u>Fidelity</u></p> <p><input type="checkbox"/> Delivered all content materials according to the current Stanford leaders’ manual</p> <p><input type="checkbox"/> Accurately paraphrased sections of activities</p> <p><input type="checkbox"/> Distributed and collected appropriate Institute data collection forms</p>	
<p>Additional Comments:</p>	

Signature of Workshop Facilitator: _____

Signature of Fidelity Coach: _____

Session 1 Fidelity Checklist

	Comments
<input type="checkbox"/> Agenda posted, name tags available <input type="checkbox"/> Workshop Attendance Log available <input type="checkbox"/> Surveys and consent letters distributed and collected	
Activity #1 Introduction of Workshop	
<input type="checkbox"/> Appropriately introduced self and co-facilitator <input type="checkbox"/> Paraphrased scripted portions without adding or removing content <input type="checkbox"/> Accurately presented material on Charts 1, 2, and 3 <input type="checkbox"/> Distributed and discussed overview/ homework handout	
Activity #2 Group Introductions	
<input type="checkbox"/> Modeled introductions, 1-2 problems caused by chronic condition <input type="checkbox"/> Accurately delivered instructions for introductions <input type="checkbox"/> Co-facilitator wrote concerns on white board/chart pad <input type="checkbox"/> Pointed out that concerns are the same	
Activity #3 The Mind-Body Connection/Distractio	
<input type="checkbox"/> Used Charts 2 and 4 as directed in the script <input type="checkbox"/> Guided through lemon activity slowly <input type="checkbox"/> Clearly discussed brainstorm guidelines <input type="checkbox"/> Conducted brainstorm appropriately <input type="checkbox"/> Timed distraction techniques correctly	
Activity #4 Getting a Good Night's Sleep	
<input type="checkbox"/> Paraphrased scripted portions without adding or removing content <input type="checkbox"/> Conducted brainstorm appropriately	
Activity #5 Introduction to Action Plans	
<input type="checkbox"/> Presented info in Chart 5, posted on wall <input type="checkbox"/> Modeled action plan appropriately <input type="checkbox"/> Broke people into pairs, family members not paired with each other. Used a timekeeper <input type="checkbox"/> Asked for volunteer to report on action plan <input type="checkbox"/> Summarized each action plan by using the standard: <input type="checkbox"/> Something YOU WANT to do Achievable Action specific Answers what, how much, when, how often Confidence level of 7 or more <input type="checkbox"/> For confidence levels < 7, guided through identification of barriers. <input type="checkbox"/> Informed participants that leaders will be calling them to support them in their plans.	
Activity #6 Closing	
<input type="checkbox"/> Reviewed 7 items <input type="checkbox"/> Followed activity timelines, class ended within 2 ½ hours	

Session 2 Fidelity Checklist

	Comments
<input type="checkbox"/> Agenda and Charts 2, 3, 4, 5, and 6 posted <input type="checkbox"/> Charts have legible handwriting, dark colored marking pens, easily readable, name tags available	
Activity #1 Feedback/Problem Solving	
<input type="checkbox"/> Modeled feedback, stated action plan and level of success, asked for volunteer <input type="checkbox"/> Complimented appropriate action plan adjustment/modification <input type="checkbox"/> If action plan is not achieved: Followed steps illustrated on flow chart <input type="checkbox"/> Conducted brainstorm appropriately <input type="checkbox"/> Limited to 3 'yes buts', offered the person to choose one idea <input type="checkbox"/> Recommended person make a note of suggestions offered <input type="checkbox"/> Modeled problem-solving steps appropriately, reviewed chart 6	
Activity #2 Dealing with Difficult Emotions	
<input type="checkbox"/> Utilized Chart 7 to illustrate difficult emotions <input type="checkbox"/> Facilitators modeled own causes of difficult emotions correctly <input type="checkbox"/> Accurately delivered instructions for group activity: Reporting for your partner Info does not have to be shared <input type="checkbox"/> Checked with partners for accuracy <input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet) <input type="checkbox"/> Asked participants to volunteer any new things they are going to use to deal with these emotions in the future <input type="checkbox"/> Specified writing or journaling for dealing with difficult emotions <input type="checkbox"/> Asked participants to share something they are grateful for	
Activity #3 Introduction to Physical Activity and Exercise	
<input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet) <input type="checkbox"/> Utilized Chart 8, paraphrased section appropriately <input type="checkbox"/> Asked participants to identify physical activity goal and barrier <input type="checkbox"/> Problem solved with 1-2 participants <input type="checkbox"/> Encouraged choosing a goal around physical activity	
Activity #4 Preventing Falls and Improving Balance	
<input type="checkbox"/> Reviewed Chart 9, paraphrased appropriately <input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet)	
Activity #5 Making an Action Plan	
<input type="checkbox"/> Clearly utilized Chart 5-reminded participants that the plan should be something they want to do and be achievable <input type="checkbox"/> Conducted action plan appropriately (see summary sheet)	
Activity #6 Closing	
<input type="checkbox"/> Reviewed 9 items <input type="checkbox"/> Followed activity timelines, class ended within 2 ½ hours	

Session 3 Fidelity Checklist

	Comments
<input type="checkbox"/> Agenda and Charts 2, 3, 4, 5, 6, and 7 posted <input type="checkbox"/> Charts have legible handwriting, dark-colored marking pens, easily readable, name tags available	
Activity #1 Feedback/Problem Solving	
<input type="checkbox"/> Modeled feedback, stated action plan and level of success, asked for volunteer <input type="checkbox"/> Complimented appropriate action plan adjustment/modification <input type="checkbox"/> If action plan was not achieved: <input type="checkbox"/> Followed steps as illustrated on flow chart <input type="checkbox"/> Conducted brainstorm appropriately <input type="checkbox"/> Limited to 3 'yes buts', offered the person to choose one idea <input type="checkbox"/> Recommended person make a note of suggestions offered <input type="checkbox"/> Modeled problem solving steps appropriately, reviewed Chart 6	
Activity #2 Making Decisions	
<input type="checkbox"/> Accurately delivered material and review of Charts 10 and 11 <input type="checkbox"/> Delivered decision making activity instructions correctly, broke into pairs, did not exceed 10 minutes <input type="checkbox"/> Asked 1 or 2 pairs to share using points 1-3	
Activity #3 Pain and Fatigue Management	
<input type="checkbox"/> Clearly delivered activity content, appropriately brainstormed using different color markers to represent pain and fatigue	
Activity #4 Endurance Activities: How Much is Enough?	
<input type="checkbox"/> Clearly delivered content, using Charts 7, 12, 13, and 14 <input type="checkbox"/> During endurance monitoring, one leader marched in place and the other led the orchestra <input type="checkbox"/> Suggested to participants to keep a log of physical activity done each day and a food log 2 days (one week day and one weekend day)	
Activity #5 Body Scan	
<input type="checkbox"/> Let participants know that participation in this activity is optional <input type="checkbox"/> Conducted "Body Scan Relaxation" appropriately by reading or using CD <input type="checkbox"/> Encouraged participants to give this activity a two week try <input type="checkbox"/> Mentioned that the script is printed in the book	
Activity #6 Making an Action Plan	
<input type="checkbox"/> Accurately utilized Chart 5-reminded participants that the plan should be something they want to do and be realistic <input type="checkbox"/> Conducted making an action plan appropriately (see summary Sheet)	
Activity #7 Closing	
<input type="checkbox"/> Reviewed 8 items <input type="checkbox"/> Followed activity timelines, class ended within 2 ½ hours	

Session 4 Fidelity Checklist

	Comments
<input type="checkbox"/> Agenda and Charts 2, 3, 4, 5, 6, and 7 posted <input type="checkbox"/> Charts are legible handwriting, dark colored marking pens, easily readable, name tags available	
Activity #1 Feedback/Problem Solving	
<input type="checkbox"/> Modeled feedback, stated action plan and level of success, asked for a volunteer <input type="checkbox"/> Complimented appropriate action plan adjustment/modification <input type="checkbox"/> If action plan is not achieved: Followed steps as illustrated on flow chart <input type="checkbox"/> Conducted brainstorm appropriately <input type="checkbox"/> Limited to 3 'yes buts', offered the person to choose one idea <input type="checkbox"/> Recommended person make a note of suggestions offered <input type="checkbox"/> Modeled problem solving steps appropriately, reviewed Chart 6	
Activity #2 Better Breathing	
<input type="checkbox"/> Accurately delivered material and review of Chart 15 <input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet) <input type="checkbox"/> Correctly demonstrated pursed lip & diaphragmatic breathing technique	
Activity #3 Healthy Eating	
<input type="checkbox"/> Facilitator modeled what was learned from food diary Asked four or five participants to share <input type="checkbox"/> Clearly presented information and Charts 16 and 17. <input type="checkbox"/> Described healthy eating not as dieting, but making small changes <input type="checkbox"/> Directed participants to appropriate pages in book <input type="checkbox"/> Conducted call outs/questions appropriately, confirmed correct answers <input type="checkbox"/> Asked participants to bring labels to share for Session 5	
Activity #4 Communication Skills	
<input type="checkbox"/> Delivered content according to manual, clearly explained "I" messages <input type="checkbox"/> Delivered role-plays accurately	
Activity #5 Problem Solving	
<input type="checkbox"/> Reviewed Chart 8 <input type="checkbox"/> Delivered instruction for group activity clearly <input type="checkbox"/> Kept reports concise <input type="checkbox"/> Statement of problem clear, asked for up to 3 ideas <input type="checkbox"/> Checked with partner for correctness	
Activity #6 Making an Action Plan	
<input type="checkbox"/> Accurately utilized Chart 5 -reminded participants that the plan should be something they want to do and be realistic <input type="checkbox"/> Conducted action plan appropriately (see summary sheet)	
Activity #7 Closing	
<input type="checkbox"/> Reviewed 7 items, encourage choosing new buddies to call <input type="checkbox"/> Followed activity timelines, class ended within 2 ½ hours	

Session 5 Fidelity Checklist

	Comments
<input type="checkbox"/> Agenda and Charts 2, 3, 4, 5, 6, 7 and 8 posted <input type="checkbox"/> Charts are legible handwriting, dark colored marking pens, easily readable, name tags available	
Activity #1 Feedback/Problem Solving	
<input type="checkbox"/> Modeled feedback, stated action plan and level of success, asked for a volunteer <input type="checkbox"/> Complimented appropriate action plan adjustment/modification <input type="checkbox"/> If action plan is not achieved: Followed steps as illustrated on flow chart <input type="checkbox"/> Conducted brainstorm appropriately <input type="checkbox"/> Limited to 3 'yes buts', offered the person to choose one idea <input type="checkbox"/> Recommended person make a note of suggestions offered <input type="checkbox"/> Modeled problem solving steps appropriately, reviewed Chart 6	
Activity #2 Making Healthy Food Choices	
<input type="checkbox"/> Clearly presented Chart 19, paraphrased appropriately <input type="checkbox"/> Conducted "call outs" correctly. Identified correct answers <input type="checkbox"/> Had supply of labels available for participants who needed them <input type="checkbox"/> Referred to corresponding pages in book	
Activity #3 Medication Usage	
<input type="checkbox"/> Clearly presented content, used Charts 20, 21, and 22 <input type="checkbox"/> Conducted combination brainstorm/problem-solving appropriately	
Activity #4 Making Informed Treatment Decisions	
<input type="checkbox"/> Clearly presented content, used Chart 23	
Activity #5 Depression Management	
<input type="checkbox"/> Utilized Chart 7 appropriately <input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet) <input type="checkbox"/> Reminded participants alcohol and some drugs can make depression worse <input type="checkbox"/> Noted need for professional treatment for severe depression	
Activity #6 Positive Thinking	
<input type="checkbox"/> Accurately delivered information <input type="checkbox"/> Clearly presented Chart 24 <input type="checkbox"/> Allowed time for participants to suggest changes for negative emotions	
Activity #7 Making an Action Plan	
<input type="checkbox"/> Accurately utilized Chart 5-reminded participants that the plan should be something they want to do and be realistic <input type="checkbox"/> Conducted action plan appropriately (see summary sheet)	
Activity #8 Closing	
<input type="checkbox"/> Reviewed 7 items, including letters to doctors <input type="checkbox"/> Followed activity timelines, class ended within 2 ½ hours	

Session 6 Fidelity Checklist

	Comments
<input type="checkbox"/> Agenda and Charts 2, 3, 4, 5, 6, and 7 posted <input type="checkbox"/> Charts are legible handwriting, dark colored marking pens, easily readable, name tags, available	
Activity #1 Feedback/Problem Solving	
<input type="checkbox"/> Modeled feedback, stated action plan and level of success, asked for volunteer, <input type="checkbox"/> Complimented appropriate action plan adjustment/modification <input type="checkbox"/> If action plan is not achieved: Followed steps as illustrated on flow chart <input type="checkbox"/> Conducted brainstorm appropriately <input type="checkbox"/> Limited to 3 'yes buts', offered the person to choose one idea <input type="checkbox"/> Recommended person make a note of suggestions offered <input type="checkbox"/> Modeled problem solving steps appropriately, reviewed Chart 6	
Activity #2 Working with Your Health Care Professional and Health Care System	
<input type="checkbox"/> Clearly defined health care system compared to health care provider <input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet) <input type="checkbox"/> Clearly presented Chart 25	
Activity #3 Weight Management	
<input type="checkbox"/> Accurately delivered content, paraphrased without adding or removing content <input type="checkbox"/> Asked for volunteers to share food dairy, managed sharing appropriately <input type="checkbox"/> Clearly presented Chart 26	
Activity #4 Looking Back and Planning for the Future	
<input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet) <input type="checkbox"/> Reviewed Chart 7 <input type="checkbox"/> Clearly modeled 3 to 6 month goals and steps to reach the goal <input type="checkbox"/> Problem-solved if appropriate <input type="checkbox"/> Participants shared accomplishments, pointed out helped each other <input type="checkbox"/> Appropriately delivered guided imagery activity <input type="checkbox"/> Certificates prepared and distributed <input type="checkbox"/> Participants completed Post Surveys	
Activity #5 Closing	
<input type="checkbox"/> Reviewed 5 items <input type="checkbox"/> Followed activity timelines, class ended within 2 ½ hours	