

Healthy Living: Self-Management Workshops (Includes CDSMP, CPSMP, DSMP, and Cancer Thriving and Surviving)

Instructions for Coaching Workshop Facilitators/Leaders

Standard

Master Trainers or experienced Facilitators will observe the Workshop Leaders/Facilitators who are collaborative partners or 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 have presented no serious fidelity issues during a fidelity coaching visit.

Additionally, all Workshop Facilitators and Master Trainers should be observed on a **yearly basis** to insure workshop fidelity is maintained. Facilitators trained in multiple programs only require **one** coaching visit per year. Coaching may be scheduled during any of the workshops for which they are facilitating when the visit is due. The same Coaching Form may be used for all self-management programs. Facilitators do **not** require a fidelity coaching each time they train in a new self-management program.

The Purpose

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

Forms

- This instruction sheet details the process for the observer or fidelity “coach.” The Coaching Form is the tool used to conduct the observation.
- The Healthy Living Coaching Form is a two-page document that allows the coach to make notes while observing the session and to document any issues or concerns discussed with the Workshop Facilitator(s) after the session.
- The following documents should be sent to the workshop leader(s), in advance of the visit: The Coaching Form and the “Workshop Facilitators: Overview of a Fidelity Coaching Visit” document which explains the process for the Leader.
- If you are observing **both** Workshop Facilitators, bring **two** copies of the coaching form, one for each leader.

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The Process

1. Sessions 2, 3, or 4 are best for observation. The Self-Management Resource Center suggests not doing a coaching visit on sessions 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 coaching form. Do NOT show up unannounced.
3. Ask the Workshop Facilitators to inform the group in advance that someone will attend to observe the leaders. 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 Facilitators to introduce the fidelity coach, whose role is to observe the Leaders.
6. Use a separate Coaching Form for each Facilitator.
7. Make notes in the boxes provided on the form corresponding to different skills observed during the session. **Note:** The Coach will need to bring along a current copy of the appropriate leader’s manual for the workshop.
8. After the session, review the notes with the Facilitators.
9. Once the observation session has been discussed, both the Workshop Facilitator and the coach will sign the original copy of the Coaching Form.
10. A copy of the signed Coaching Form will be provided to the Facilitator either at the visit (if a copier is available) or within one week.
11. Completed forms will be sent to the Institute. The Fidelity Coach may choose to keep a copy for his/her records.

** If at any time concerns emerge regarding the ability of a Leader to facilitate a workshop or any other concern, these concerns should be discussion in private. Additionally, these concerns should be documented.

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