

# Session #5: CDSMP 2012 Fidelity Observation Checklist



Name of observer(s) \_\_\_\_\_

Date of visit \_\_\_\_\_ Class time \_\_\_\_\_ a.m. / p.m.

Leader \_\_\_\_\_ Host Site \_\_\_\_\_

Leader \_\_\_\_\_ County \_\_\_\_\_

Number of participants in class: Total \_\_\_\_\_

<b>1. Environmental Factors</b>	Yes	No	N/A	Comments
a. Parking is accessible				
b. Building entrance is accessible				
c. Fully accessible restroom				
d. Elevators available for classes not on the 1 <sup>st</sup> floor				
e. Doors are easily operated				
f. Chairs are comfortable and easy to use				
g. Workshop space is large enough				
h. Lighting is appropriate				
i. Room temperature is comfortable				
j. Noise level is acceptable and instruction is easy to hear				
k. Classroom layout is conducive to discussion (e.g., roundtable/ horseshoe format)				

<b>2. Equipment and Teaching Aids</b>	Yes	No	N/A	Comments
a. Were the following materials available?				
1) Leader's Manual				
2) Book: <i>Living a Healthy Life with Chronic Conditions, 3<sup>rd</sup> or 4<sup>th</sup> Ed.</i>				
3) Flip charts/white board				
4) Easel				
5) Flip chart/white board markers				
6) Name tags				
7) Pad of paper				
8) Pens/pencils				
9) Tissues				
10) Watch/clock				
b. Is Chart 2: <i>Self-Management Tool Box</i> posted to the wall?				
c. Is Chart 3: <i>Guidelines</i> posted to the wall?				
d. Is Chart 4: <i>Brainstorming</i> posted to the wall?				

## Session #5: CDSMP 2012 Fidelity Observation Checklist

<b>2. Equipment and Teaching Aids (cont'd)</b>	Yes	No	N/A	Comments
e. Is Chart 5: <i>Parts of the Action Plan</i> posted to the wall?				
f. Is Chart 6: <i>Steps to Problem-Solving</i> posted on the wall during the class?				
g. Is Chart 7: Symptom Cycle posted on the wall during the class?				
h. Is an agenda for the session posted?				
i. Do the charts follow the appropriate guidelines?				
1) Used dark colored marking pens				
2) Legible handwriting				
3) Easily readable from across the room				

Page | 2

### *Activity One: Feedback*

Leader Facilitating the Activity: \_\_\_\_\_

<b>3. Feedback</b>	Yes	No	N/A	Comments
a. Did the leaders report on the success of their action plans by stating their action plans and then reporting their success?				
b. Did the leaders ask for a volunteer participant to report on their action plan in the same way?				
c. Did the leaders praise participants for achieving their action plans or for modifying and being good self-managers?				
d. If the participant stated that they did not achieve their action plan, did the leaders problem solve with the participant(s)?				
e. If problem solving was used, please check "Yes" by all of the steps to problem solving that the leaders utilized with participants?				
1) Asked the participant what barriers prevented them from achieving their action plan/goal				
2) Asked the participant what they tried to do to overcome the barrier				
3) If the participant had ideas or already tried a solution the problem-solve was stopped				

## Session #5: CDSMP 2012 Fidelity Observation Checklist

3. <i>Feedback (cont'd)</i>	Yes	No	N/A	Comments
4) If not, the leader asked the group if anyone had ever experienced a similar problem				
5) Asked the participant if they would like help from the group				
6) And <b>IF</b> the participant did want help from the group: Identified the problem by stating it for the group as the topic of the problem solve/brainstorm				
7) Asked the group to generate 4-5 possible solutions to the identified problem				
8) Asked the participant to choose one of the possible solutions to try				
9) Asked the participant to report back to the group on their progress				
f. Did the leaders utilize Chart 6: <i>Steps to Problem Solving</i> according to the guidelines in the current Stanford Leader's Manual?				

Page | 3

### *Activity Two: Making Healthy Food Choices*

Leader Facilitating the Activity: \_\_\_\_\_

4. <i>Making Healthy Food Choices</i>	Yes	No	N/A	Comments
a. Did the leaders utilize Chart 19: <i>Healthy Eating Guidelines</i> according to the current Stanford Leader's Manual?				
b. Did the leaders accurately deliver the information when paraphrasing sections of this activity (i.e., providing the information to participants clearly, without adding or deleting material that changed the content?)				
c. Did the leader call out questions for the participants to answer?				
d. Did the leader refer the participants to the <i>Living a Healthy Life Book</i> ?				
e. Did the leader ask participants to use their food labels from home to answer a few questions?				

## Session #5: CDSMP 2012 Fidelity Observation Checklist

### Activity Three: Medication Usage

Leader Facilitating the Activity: \_\_\_\_\_

Leader Acting as the Recorder/Scribe in this Activity: \_\_\_\_\_

5. Medication Usage	Yes	No	N/A	Comments
a. Did the leaders utilize Chart 20: <i>Purposes of Medications</i> according to the current Stanford Leader's Manual?				
b. Did the leaders utilize Chart 21: <i>Medication Effects</i> according to the current Stanford Leader's Manual?				
c. Did the leaders utilize Chart 22: <i>Medication Responsibilities</i> according to the current Stanford Leader's Manual?				
d. Did the leaders accurately deliver the information when paraphrasing sections of this activity (i.e., providing the information to participants clearly, without adding or deleting material that changed the content)?				
e. How well did the leaders follow the brainstorm guidelines below? Check "Yes" next to each item you observed during the brainstorm.				
1) The group was encouraged to produce as many ideas as possible through a creative spontaneous flow of suggestions.				
2) The group was instructed not to comment on ideas either positively or negatively during the brainstorm.				
3) The group was reminded that the time for clarifying or answering questions about the ideas generated in the brainstorm would come when the brainstorm was completed.				
4) Ideas were written in the participant's own words or if rephrased, the leader asked the participant who generated the idea to approve the change.				
5) The leader facilitating the activity repeated back aloud (for the group and the recorder/scribe) the responses of each participant.				
6) The leaders did not comment on or make judgmental remarks about the participants' ideas during the brainstorm.				

## Session #5: CDSMP 2012 Fidelity Observation Checklist

<b>5. Medication Usage (cont'd)</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>	<b>Comments</b>
7) The leader facilitating the activity managed the group well by keeping it focused on the topic, repeating the question, keeping comments from members to a minimum and using silence, eye contact, and body language to manage the flow of ideas.				
8) The leader(s) only added his/her ideas after the brainstorm was completed (or in some cases as a means to get the brainstorm started if the group was having a difficult time).				
9) The leaders added items from the manual lists that were not generated through the brainstorm where applicable.				
10) Leaders reviewed the list with participants by reading the list generated and without judging the ideas of participants.				
11) Leader asked if anything on the list needed clarification				
12) If an idea was recorded that required clarification, the leader provided an opportunity for the participant to explain.				
13) If an idea was recorded that required a clarification from a leader (e.g., the use of alcohol to manage depression or fatigue), the leader did clarify according to the Manual.				

### **Activity Four: Making Informed Treatment Decisions**

Leader Facilitating the Activity \_\_\_\_\_

<b>6. Making Informed Treatment Decisions</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>	<b>Comments</b>
a. Did the leaders utilize Chart 23: <i>Evaluating Treatments</i> according to the current Stanford Leader's Manual?				
b. Did the leaders accurately deliver the information when paraphrasing sections of this activity (i.e., providing the information to participants clearly, without adding or deleting material that changed the content?)				
c. Did the leader write the URLs on the board or chart paper?				

## Session #5: CDSMP 2012 Fidelity Observation Checklist

### Activity Five: Dealing with Depression

Leader Facilitating the Activity: \_\_\_\_\_

Leader Acting as the Recorder/Scribe during the Activity: \_\_\_\_\_

7. Depression Management	Yes	No	N/A	Comments
a. Did the leaders utilize Chart 7: <i>Symptom Cycle</i> to illustrate <i>depression</i> as a symptom on the symptom cycle, according to the current Stanford Leader's Manual?				
b. Did the leaders accurately deliver the information when paraphrasing sections of this activity (i.e., providing the information to participants clearly, without adding or deleting material that changed the content)?				
c. How well did the leaders follow the brainstorm guidelines below? Check "Yes" next to each item you observed during the brainstorm.				
1) The group was encouraged to produce as many ideas as possible through a creative spontaneous flow of suggestion.				
2) The group was instructed not to comment on ideas either positively or negatively during the brainstorm.				
3) The group was reminded that the time for clarifying or answering questions about the ideas generated in the brainstorm would come when the brainstorm was completed.				
4) Ideas were written in the participant's own words or if rephrased, the leader asked the participant who generated the idea to approve the change.				
5) The leader facilitating the activity repeated back aloud (for the group and the recorder/scribe) the responses of each participant.				
6) The leaders did not comment on or make judgmental remarks about the participants' ideas during the brainstorm.				
7) The leader facilitating the activity managed the group well by keeping it focused on the topic, repeating the question, keeping comments from members to a minimum and using silence, eye contact, and body language to manage the flow of ideas.				

## Session #5: CDSMP 2012 Fidelity Observation Checklist

<b>7. Depression Management (cont'd)</b>	Yes	No	N/A	Comments
8) The leader(s) only added his/her ideas after the brainstorm was completed (or in some cases as a means to get the brainstorm started if the group was having a difficult time).				
9) The leaders added items from the manual lists that were not generated through the brainstorm where applicable.				
10) Leaders reviewed the list with participants by reading the list generated and without judging the ideas of participants.				
11) Leader asked if anything on the list needed clarification.				
12) If an idea was recorded that required clarification, the leader provided an opportunity for the participant to explain.				
13) If an idea was recorded that required a clarification from a leader (e.g., the use of alcohol to manage depression or fatigue), the leader did clarify according to the Manual				
14) The leaders added items from the manual lists that were not generated through the brainstorm where applicable.				

Page | 7

### **Activity Six: Positive Thinking**

Leader Facilitating the Activity: \_\_\_\_\_

<b>8. Positive Thinking</b>	Yes	No	N/A	Comments
a. Did the leaders accurately deliver the information when paraphrasing sections of this activity (i.e., providing the information to participants clearly, without adding or deleting material that changed the content)?				
b. Were participants able to provide examples of negative statements changing them into positive statements with the facilitation of the leaders?				
c. Did the leaders utilize Chart 24: <i>Steps toward Positive Thinking</i> according to the current Stanford Leader's Manual?				

## Session #5: CDSMP 2012 Fidelity Observation Checklist

### *Activity Seven: Making an Action Plan*

Leader Facilitating the Activity: \_\_\_\_\_

9. <i>Making an Action Plan</i>	Yes	No	N/A	Comments
a. Did the leaders utilize Chart 7: <i>Parts of an Action Plan</i> to facilitate this activity?				
b. Did the leaders remind participants that an Action Plan is something that <b>THEY WANT TO DO?</b>				
c. When creating Action Plans, did <b>LEADERS</b> model action planning correctly for participants by stating:				
1) <b>WHAT</b> they would do (e.g., a specific action like walking);				
2) <b>WHEN</b> they would do the activity (e.g., time of day);				
3) <b>HOW MUCH</b> of the activity they would do (e.g. 4 blocks, 20 minutes);				
4) <b>HOW OFTEN</b> they would do the activity (e.g. number of times out of 7 days, being sure not to select every day or 7 days)				
5) A <b>CONFIDENCE</b> level (the number from 1 to 10 expressing how confident they are that they will achieve the entire action plan they made for the week (e.g., 7 or higher) following the guidelines for making an action plan?				
d. Did one leader make an action plan that was <b>NOT</b> focused on an exercise goal?				
e. Did each <b>PARTICIPANT</b> make an action plan?				
f. When creating Action Plans, did <b>PARTICIPANTS</b> state:				
1) <b>WHAT</b> they would do (e.g., a specific action like walking)				
2) <b>WHEN</b> they would do the activity (e.g., time of day)				
3) <b>HOW MUCH</b> of the activity they would do (e.g. 4 blocks, 20 minutes)				
4) <b>HOW OFTEN</b> they would do the activity (e.g. number of times out of 7 days, being sure not to select every day or 7 days)				

## Session #5: CDSMP 2012 Fidelity Observation Checklist

<b>9. Making an Action Plan (cont'd)</b>	Yes	No	N/A	Comments
5) A CONFIDENCE level (the number from 1 to 10 expressing how confident they are that they will achieve the entire action plan they made for the week (e.g., 7 or higher) following the guidelines for making an action plan?				
g. If a participant's confidence level is below a 7, did the leader(s) assist the person in elevating, or increasing, it to a 7 or higher?				
h. If additional group problem solving was needed during this activity to assist participants in making an action plan, did the leaders follow the problem solving guidelines according to the current Stanford Leader's Manual?				

### Activity Eight: Closing

Leader Facilitating the Activity: \_\_\_\_\_

<b>10. Closing</b>	Yes	No	N/A	Comments
a. Completed all scheduled activities on the agenda?				
b. Class ended within 2.5 hours?				

<b>11. Other Observations</b>	Yes	No	N/A	Comments
a. Class started on time?				
b. Followed activity time limits?				
c. Were the leaders respectful when differing views were expressed by accepting differing points of view and by avoiding making judgments of participants' ideas, progress or action plans?				
d. Were the leaders able to keep participants on topic (for example, did the leaders redirect conversations that were not related to the discussion topic and limit side conversations)?				
e. If participants were reluctant to participate in activities, did the leaders gently <i>encourage</i> , but NOT force their participation (even if unsuccessful)?				

## Session #5: CDSMP 2012 Fidelity Observation Checklist

<b>11. Other Observations (cont'd)</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>	<b>Comments</b>
f. When using personal examples, did the leaders talk about themselves or provide an example for less than one minute?				
g. In your opinion, did these leaders maintain a non-judgmental attitude throughout the workshop toward all participants?				
h. Was there a break?				
i. Were the participants provided a healthy snack at the break?				
j. How long did the break last?	Minutes: _____			

	<b>Excellent</b>	<b>Very Good</b>	<b>Good</b>	<b>Average</b>	<b>Below Average</b>
k. How closely did the leaders follow the Leader's Manual? ( <i>Excellent</i> = Using the manual as a guide to structure the class and following the language closely. <i>Below Average</i> = paraphrasing the content extensively.)					
l. In your opinion, did these leaders work well together? ( <i>Excellent</i> =Very supportive of one another & no sign of disagreement over course content or process. <i>Below Average</i> =Not coordinated and/or supportive of one another; open disagreement over content or process.)					
m. In your opinion, how receptive were these leaders to participants? ( <i>Excellent</i> =Willing to meet with them during the break; demonstrated an ability to facilitate problem solving. <i>Below Average</i> = Unavailable to participants during break; showed a lack of concern for one or more participants.)					

***If you think facilitation skills of either or both leaders are "average" or "below average," please provide additional comments to support your evaluation:***

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## Session #5: CDSMP 2012 Fidelity Observation Checklist

**Session #5: CDSMP 2012 Fidelity Observation Checklist**

<b>11. Other Observations (cont'd)</b>	Yes	No	N/A	Comments
n. Did the leaders add content material, stories, anecdotes or information not provided in the current Stanford Leader's Manual (these might include stories of inspiration, information about community programs, etc.)?				<i>If yes, please describe:</i>
o. Did the leaders leave out or skip over content material provided in the Leader's Manual?				<i>If yes, please describe:</i>
p. What else did you observe at this workshop that might help us to understand the quality of the programming at this location?				<i>Please provide any additional comments:</i>