



Living Healthy (i.e. CDSMP): Adoption 101

This document has been designed to help those organizations in North Carolina that have decided to adopt the *Living Healthy* program (i.e. The Chronic Disease Self-Management Program; CDSMP). Should you have any questions about the information below, or about *Living Healthy* in general, please contact CDSMP Coordinator, Serena Weisner at (919) 733-0440 OR serena.weisner@dhhs.nc.gov.

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What is *Living Healthy*?

Living Healthy is North Carolina's name for the Chronic Disease Self-Management Program (CDSMP), which is a community-based workshop for people who have one or more chronic diseases (e.g. arthritis, heart disease, diabetes, etc.), or are caring for someone who has one or more chronic diseases. There are usually 10-15 people who take part in each workshop, but attendance may go as low as 7 participants. The ultimate goal of the *Living Healthy* workshop is to provide the participants with the tools they need to take control of their disease(s), and to better manage their actions and health.

Living Healthy workshops are 6 sessions long – 1 session per week for 6 consecutive weeks. Each session is 2 ½ hours long, and the topics covered include:

- Managing medications
- Communicating with family, friends, and health care providers
- Eating healthy
- Dealing with difficult emotions
- Exercise
- Relaxation and breathing techniques
- Planning for the future

The workshops are led by two trained leaders (i.e. “Lay Leaders” or “Master Trainers”; definitions to follow), at least one of whom is managing his/her own chronic health condition/s, or is caring for someone with chronic disease. The leaders facilitate the workshop, but much of the learning takes place as a result of the highly interactive and participatory nature of the sessions.

Approximately how much does it cost to offer 1 *Living Healthy* workshop?

Approximate cost of conducting a <i>Living Healthy</i> workshop (6 weeks) for <u>12</u> participants			
	Cost	#	Total
Stipend for leaders (optional)	\$ 150	2	\$ 300
Books (<i>Living a Healthy Life with Chronic Conditions</i>)	\$ 13	12	\$ 156
Relaxation CDs (<i>Time for Healing</i>)	\$ 8	12	\$ 96
Snacks for breaks (optional)	\$ 24	6	\$ 144
Flip Chart	\$ 30	1	\$ 30
Markers	\$ 5	1	\$ 5
Masking Tape	\$ 3	1	\$ 3
Name Tags	\$ 3	1	\$ 3
Total w/ stipend for leaders			\$ 737
<i>Cost/person</i>			\$ 61
Total w/o stipend for leaders			\$ 380
<i>Cost/person</i>			\$ 32

Although the stipend for the leaders is optional, it is suggested that the host organization do something for the leaders. If a leader is willing to lead a workshop as part of his/her job, than they should not be paid a stipend, but may still be offered mileage compensation.

Your leaders are your most valuable resources for this program! Making sure that they feel valued and not over-worked is essential. You may want to add some funds to your budget to support an annual party or reunion for all the leaders in your area.

What do I need to be able to begin offering *Living Healthy* in my community?

- (1) A staff person to provide oversight and organize *Living Healthy*. This is usually someone who has experience coordinating health promotion programs, but can also be a dedicated and consistent volunteer or intern.

Please note: All staff should have a general awareness and understanding of the program in order to respond to questions regarding the program.

- (2) A CDSMP License from Stanford University. Every organization offering a Stanford program, such as CDSMP, must have a license for that program. Each license is good for 3 years from the date of issue.

Licenses are offered at the following rates:

- \$500.00 for offering 10 or fewer workshops a year**
- \$1000 for offering 10 - 30 workshop a year
- If an organization is offering more than 30 workshops a year, it must negotiate a license with Stanford's Office of Technology Licensing

**This is the option that is most appropriate for most AAA Regions, especially as they are starting out.

Please note, only participant workshops are counted under your license, not LL trainings. For example, if you have a license to offer 10 workshops / year, and you want to offer 10 workshops plus several LL trainings, you can do that. The LL trainings aren't counted.

To obtain a license, please complete the application and follow the directions at: http://patienteducation.stanford.edu/licensing/license_app.pdf

- (3) At least two people who are trained as "Lay Leaders" or "Master Trainers" in *Living Healthy/CDSMP*. These are the people who will lead the workshop for you. Please note, you do not need to have a Master Trainer (or 2) in order to begin

offering workshops to older adults, you just need to have Lay Leaders. If you don't know if there are Lay Leaders in your area, contact Serena Weisner (serena.weisner@dhhs.nc.gov). There is a list of Master Trainers on the *Living Healthy* website: www.ncdhhs.gov/aging/livinghealthy/livinghealthy_tools.htm

Master Trainers (MTs) are people who have attended a 4 ½ day training that is led by 2 T-Trainers (T-Trainers are people who have several years of experience as MTs, and have been specially certified as T-Trainers by Stanford). Certified MTs are able to lead workshops for participants AND train people to become Lay Leaders.

Lay Leaders (LLs) are people who have attended a 4 day training that is led by 2 MTs. They are only allowed to lead workshops for participants, they cannot train other LLs.

It is always a good idea to have more than two LLs available to work with you in your community. There may be instances when a substitute Leader is needed to fill in for a session if one Leader needs to be absent. Additionally, taking care to avoid LL burn-out is crucial. Do not expect your LLs to lead more than 2 workshops per year. Some may be willing to lead more than two, but this is usually the exception.

- (4) Accessible and consistent meeting space and workshop materials. Workshops should be scheduled to take place in convenient, familiar, and accessible locations, with parking and/or public transportation easily available to participants.

The room in which the workshop takes place should be:

- big enough to allow 10-15 people, plus the two leaders, to sit in a circular or 'hollow square' formation;
- private – with doors that close to keep out any interruptions and to ensure that conversations that take place remain private;
- accessible to restrooms;
- consistent each week; and
- kept at a comfortable temperature, preferably controlled by the leaders.

Each participant should have access to a copy of the book *Living A Healthy Life with Chronic Conditions* and the audio CD/tape *Time for Healing*. Both of these can be ordered from Bull Publishing, www.bullpub.com.

If you do not have the resources available to give each participant a book, you can ask for donations for the book, charge a nominal fee for them, set up a

lending library, or work with a local funder who is willing to purchase the books in exchange for acknowledgement/publicity (e.g. a sticker on the cover stating “This book was donated by…”).

It is suggested that you do not hand the books out to participants until the end of the session #2, when people are more committed to finishing the workshop. Many books have been lost to those who attend the session #1 and do not return. However, if you do decide to give the books to participants during the session #1, you may want to ask people to return them if they decide not to continue the course. A lending library can also help decrease the number of lost books. In this situation, a participant can check out a book during the session #1 and then return the book or purchase it at the end of the session #6. If a participant does not continue with the course, they will receive a phone call from someone requesting that the book be returned.

Leaders will need the following materials before the start of session #1:

- One Attendance Sheet
(www.ncdhhs.gov/aging/livinghealthy/livinghealthy_tools.htm)
- Copies of the Participant Information Sheet (1 per participant)
(www.ncdhhs.gov/aging/livinghealthy/livinghealthy_tools.htm)
- 2 Large Flipcharts – preferably the Post-It variety
- Blue painters tape – to hang charts (if needed)
- Blank name tags and/or name tents
- Markers – for writing on the flipcharts & name tags
- Blank sheets of paper – for participants to use when taking notes
- Pens or pencils
- Kleenex
- A watch/clock that marks seconds
- *Living A Healthy Life with Chronic Conditions* books (www.bullpub.com)
- *Time for Healing* audio CDs/tapes (passed out to participants at the end of session #3) (www.bullpub.com)

If the leaders are not able to leave the materials in a secure location at the workshop site, they will need to be able to take them to and from the site each week. Providing them with a wheeled box (like this one: www.amazon.com/Olympia-85-010-Pack-N-Roll-Portable-Carrier/dp/B000UZ0P7I/ref=pd_cp_hi_3) can make this much easier.

- (5) *Partners*. You have probably already begun thinking about all the partners you work with (or could work with) to make *Living Healthy* a success. Now is a great

time to start getting them on board! Here are some of the things that partners can provide:

- The use of their LLs or MTs
- Space for the workshops to take place
- Snacks for participants
- Funding for the books and/or CDs
- Transportation for participants
- Publicity/advertising opportunities

Being creative about the roles that your partners can play and the resources they can provide will pay off BIG when it comes to sustaining *Living Healthy* for years to come.

What if I don't have any leaders in my area?

If you do not have Lay Leaders (LLs) or Master Trainers (MTs) in your community, you will need to either host a training for LLs, or send at least two people to a MT training.

****Please note: It is NOT NECESSARY to have Master Trainers in your community in order to begin offering *Living Healthy*.**** In fact, you may want to invest in training Lay Leaders first, and get the workshops underway before committing to paying for Master Trainers to be trained.

Regardless of which option you choose, you will still need to purchase a license from Stanford and purchase the materials needed for the workshops.

Your options for bringing leaders to your area are:

(1) Send 2 People to a CDSMP Master Trainer Training

(Just a reminder, a Master Trainer is someone who can lead workshops AND train new Lay Leaders.) This can be an expensive option, especially if you have to send people to Stanford University, but it will allow you to train numerous LLs in your community.

There are two ways to get Master Trainers in your Region, ① you can send people to a training at Stanford University, or ② you can find a training taking place in a location closer to North Carolina.

① The Master Trainer trainings primarily take place at Stanford University, but there are various other "host" settings across the country. You can find the dates of upcoming trainings at Stanford by going to the following link and looking in the column on the right side: <http://patienteducation.stanford.edu/training/>.

Costs for the 4½ day CDSMP Master Trainer training at Stanford:

- \$1600 per health professional (e.g. a staff member at your agency)
- \$900 for a lay person with chronic disease (e.g. a volunteer from the community)

Included in this training is all instruction, one set of all materials, and breakfast for 5 days, and lunch for 4 days.

② You may be able to attend Master Trainer trainings held in nearby states, or in North Carolina. The costs for these trainings vary, as do the schedules. Contact Serena Weisner (serena.weisner@dhhs.nc.gov), if you are interested in this option.

(2) Host a Lay Leader Training

You can have up to 26 people trained as Lay Leaders in your community by hosting a Lay Leader training. The Lay Leader trainings are 4 days in length – from 9:00 am to 4:00 pm each day. You will need at least 2 – 3 months to plan the Lay Leader training.

Steps to hosting a *Living Healthy* LL training:

- {a} Purchase a license from Stanford, or partner with an organization that already has a license to offer CDSMP.
- {b} Identify 2 Master Trainers who are willing to come to your community to conduct the training. In most cases, you will have to pay travel expenses for these people, and it is recommended that they are also given a \$150 stipend each. A list of the Master Trainers can be found on the following page: www.ncdhhs.gov/aging/livinghealthy/livinghealthy_tools.htm
- {c} Identify a location for the training to take place, and work with the location coordinators and the Master Trainers to secure the dates the training will take place.
- {d} Begin recruiting and registering people who are interested in becoming LLs. These should be people from your agency and partnering agencies, as well as volunteers from the community – do not depend solely on staff! It is highly encouraged that you recruit as many dedicated people as possible, particularly those who are truly interested in health, and in helping other

improve health. Additionally, remember to recruit leaders who are living with chronic illness themselves – either as a caregiver or personally.

On the following site, you will find a Lay Leader Position Description, a Lay Leader Information Sheet, and a Lay Leader Memo of Agreement:

www.ncdhhs.gov/aging/livinghealthy/livinghealthy_tools.htm

{e} Gather the materials you will need for the Lay Leader training (these are nearly identical to the materials for the workshops):

- Attendance Sheet
- Copies of the Lay Leader Information Sheet
(www.ncdhhs.gov/aging/livinghealthy/livinghealthy_tools.htm)
- 2 Flipcharts – preferably the Post-It variety
- Blue painters tape – to hang charts (if needed)
- Markers – for writing on the flipcharts & name tags
- Blank name tags and/or name tents
- Pens or pencils
- A watch/clock that marks seconds
- *Living A Healthy Life with Chronic Conditions* books (1/participant)
- *A Time to Health* audio CDs/tapes (1/participant)
- Copies of the Lay Leader Manual (1/participant) – contact the MTs or Serena to obtain
- Snacks & beverages (x 4 days)
- Order lunches (x 4 days)

{f} Begin to set up workshops in your community so that the new LLs can use the skills they learn during the training while they are still fresh. Ideally, you should aim to have the first workshops start 2 – 4 weeks following the LL training.

{g} Call all registrants one week prior to training to remind them and make sure that they have directions and will be attending.

{h} Send a list of the participants to the MTs prior to the training.

Sample budget for hosting a LL training for 15 people

Stanford License		Assumptions: ⇒ Donated meeting space ⇒ No mileage reimbursement for participants ⇒ Don't already have a license from Stanford to offer CDSMP
License for 10 workshops/yr for 3 yrs	\$ 500	
Master Trainers		
Stipend (\$150/MT)	\$ 300	
Hotel (\$63.75/night/MT; 4 nights)	\$ 510	
Breakfast & dinner (\$24.25/MT; 5)	\$ 243	

days)				
Mileage reimbursement (55¢/mile; estimate 280 miles total)	\$ 154			
Master Trainers Subtotal	\$ 1,207			
Materials				
Books (\$13 each)	\$ 195			
CDs (\$8 each)	\$ 120			
Printing (\$15/person)	\$ 225			
Flipcharts (2 @ \$30 each)	\$ 60			
Markers (1 @ \$5)	\$ 5			
Name tags	\$ 3			
Lunch (\$9.25/person/day)	\$ 629			
Snacks (\$3/person/day for 5 days)	\$ 255			
Materials Subtotal	\$ 1,492			
TOTAL	\$ 3,199	Less license fee	\$ 2,699	
Cost per person	\$ 213			

I have the license, leaders, space, and materials....now what?

- (1) Determine the availability of both the workshop leaders (i.e. LLs or MTs) in your community AND the availability of the workshop location(s). Since you'll have to work within these confines, this might limit the number of workshops you can hold, and where, so make sure you their availability first.
- (2) Schedule workshops and make sure that you have at least 4 - 6 weeks to advertise prior to the session #1.
- (3) Determine who will be responsible for registering participants. Sometimes the place where the workshop is being held prefers to have registration take place through them.
- (4) Begin advertising the workshop and signing up participants. Some ideas for recruiting participants include:
 - Conducting information sessions/presentations – These can be done at the workshop locations, as well as other places throughout the community. This has proven to be one of the best ways to recruit participants. Contact Serena Weisner (serena.weisner@dhhs.nc.gov) for a sample presentation.
 - Posting flyers and making brochures available at senior centers, nutrition sites, pharmacies, health care providers offices (including Physical Therapists and Occupational Therapists). Templates for these materials can be found at: www.ncdhhs.gov/aging/livinghealthy/livinghealthy_tools.htm

- Requesting articles in local daily and weekly newspapers. Often times, calling a local newspaper and asking to speak to the health editor or someone who writes about community health issues, is enough to give you the opportunity to pitch the program and get a free article in an upcoming edition. The same is true for local news stations. They are particularly fond of human interest stories that include testimonials from workshop participants.
 - Advertise in bulletins and newsletters that target seniors.
 - Inform and invite people who have signed up for other programs in the past.
 - Include an invitation with appointment slips that are sent out by physicians' offices.
 - Advertise to people in other health education classes, including classes sponsored by other organizations.
 - Work with voluntary health agencies in your area.
 - Talk to support groups in hospitals and throughout the community.
 - Publicize in local churches, maybe in bulletins or announcements after services. (Churches are also great places to offer workshops!)
 - Put flyers on exam room doors and brochures in waiting areas at various health care offices (including OT and PT offices).
 - Contact and invite patients on the hospital discharge list, hospital auxiliaries or consortiums.
 - Work with home health agencies.
 - Advertise in quarterly hospital newspapers, in the community education calendar, as well as in local papers that have community education calendars.
- (5) Over recruit. Aim for registering 15-17 participants for each workshop. Most of the time, 2-4 people will not show up to the session #1, or will decide the workshop is not for them. Ideally, you will have 10 to 15 people in each workshop. This may be difficult in some rural areas, but do not plan on holding workshops if fewer than 7 people are registered unless those registrants can commit to bringing a friend or family member with them.
- (6) Confirm everything with the leaders and make sure that they have all the materials for the workshop at least 1 – 2 days in advance. Remind them to collect all the Participant Information Sheets during the session #1.
- (7) If possible, call all workshop registrants the day before the session #1 to remind them about the workshop. Some people may forget if they sign up 6 weeks in advance. If you still have several spaces available in the workshop,

encourage registrants to bring a friend or family member who has a chronic health condition. New participants are welcome to join during the session #2 as well, but not after that point.

- (8) Call the leaders after the sessions #1 & #3 to see how things went, and to see if they need anything. All leaders are free to contact Serena Weisner (serena.weisner@dhhs.nc.gov) directly with any questions or concerns.
- (9) Meet with leaders following the session #6 to gather unused materials, the Attendance Sheet, and the Participant Information Forms, and to discuss how the workshop went.

Tell me more about how often, when, and where to hold workshops

The number of times you conduct *Living Healthy* will depend on the number of leaders you have, the size of your community, your resources, and the demand for the program. A rural community with only two leaders may only hold two workshops per year, whereas, an urban community with 26 leaders and several sites where workshops can take place, may conduct 10-15 workshops per year.

Keeping in mind that the books and audio CDs/tapes are the most expensive part of offering the workshops, you may want to figure out how to make these resources stretch further. For example, you may want to lend the books to participants after session #2, and then give participants the option of purchasing them for a nominal fee. You could also ask for donations from participants, if they would like to keep the books. Also, make sure that participants have CD/tape players at home before giving them a copy of the CD/tape.

Schedule *Living Healthy* workshops during a time of the day that is convenient for your target audience. For example, most seniors prefer activities that take place from 9:00 am to 12:00 pm and from 1:00 pm to 3:00 pm. These time slots work particularly well when workshops are held at senior centers or congregate meal sites. However, workshops can often be held earlier than 9:00 or after 3:00 if they are being conducted in a residential setting, where people do not have to be concerned about transportation to or from the workshop location. Workshops held in churches can often times be scheduled for Sundays, following services, and workshops that target “young old” populations who may still be working, should be scheduled in the evenings.

Living Healthy workshops can be held a wide variety of locations. Often times, conducting the workshops in nontraditional settings can help you reach more participants, as well as different types of participants. Some ideas include:

- Community health centers
- Churches / faith-based communities
- Libraries
- Physicians' offices
- Senior centers
- Area Agencies on Aging
- Law offices (if they offer elder law services)
- Senior housing
- Public housing
- Retirement communities (NOT nursing homes)
- Congregate meal sites
- Public health departments
- Community centers
- Fitness centers
- Parks and recreation facilities
- YMCA/YWCA
- Fraternal clubs – Kiwanis Club, Masons, etc.
- Respite care centers

What should I do after the workshop? Is that it?

You may hear from the leaders of the workshop that some of the participants want to keep meeting, or want to continue to learn things related to health promotion and healthy aging. Since the *Living Healthy* workshop is all about self-management and learning to take control of one's health, the participants of the workshop should be encouraged to continue meeting on their own if they are interested in doing so. They will need to find a place and a time to meet, and will need to meet without the support of the leaders (who have fulfilled their commitment), unless the leaders want to continue as a member of the group, NOT the leader of the group.

If you would like to hold a reunion for the participants of one workshop, or hold one large reunion for the participants of all the *Living Healthy* workshops, that is also a good option. It can give you an opportunity to follow-up with everyone and see how they are doing, if they are continuing with their action plans, etc.

There is currently no formal follow-up with participants following the workshop.

Can I change *Living Healthy* by only using pieces of the program, offering it twice a week for 3 weeks, rearranging it, or changing the format?

NO! Fidelity (i.e. staying true to the program design) is the core of all evidence-based programs. *Living Healthy* has been proven to have positive impacts on participants' health. However, if you begin changing the program – adding things and/or

subtracting, or changing the format – you are no longer offering the *Living Healthy* program, and your participants may not experience the same positive outcomes.

Even if you do not intentionally change the workshop, the risk of “drifting” from the original model can, and often does, happen at any time. If the implementation begins to “drift,” the participants do NOT have the same chance of having the improved health status, enhanced self-efficacy, or reduced health care utilization.

In the first year of implementing the program, fidelity is relatively easy. The difficulty is in maintaining the focus on fidelity over time. For that reason, “maintaining fidelity to the model” should be a topic that is included in your early planning efforts.

Serena Weisner will be following up with more on this topic as *Living Healthy* continues to grow and spread across North Carolina. It is likely that a fidelity monitoring process will be put in place to help everyone track how the program is being implemented. Being aware of the importance of fidelity right now, and emphasizing it to your staff, your leaders, and your partners, at every opportunity will help keep this task manageable.

Where can I get more information?

The North Carolina Division of Aging and Adult Services and the Division of Public Health are committed to improving the health outcomes for persons with chronic conditions. In addition, state and national information is in place to help you explore evidence-based programs, adopt them, and successfully implement them in your community.

- Serena Weisner, CDSMP Project Coordinator
(919) 733-0440; ext. 246
serena.weisner@dhhs.nc.gov
- North Carolina’s *Living Healthy* web page
www.ncdhhs.gov/aging/livinghealthy/livinghealthy.htm
 - Contact information for all Regional Coordinators & Statewide Coordinator
 - Listings of upcoming workshops and trainings
 - Templates and resources for marketing materials, workshops, Lay Leader trainings, etc.
 - Links to other resources
- NC Roadmap for Healthy Aging
A tool to help communities adopt evidence-based programs that are appropriate for their older adult population (i.e. that address their needs).
www.ncroadmap.org
- Stanford Patient Education Research Center (the developers of *Living Healthy*)
<http://patienteducation.stanford.edu/>
 - Licensing

- Training
- Examples of tools, presentations, and marketing materials
- Sample evaluations
- Certification information for Master Trainers
- Information about many programs in addition to CDSMP/*Living Healthy*

- Center for Healthy Aging (located at the National Council on Aging)
The technical assistance and resource center for AoA's *Evidence-Based Disease Prevention Program*.
www.healthyagingprograms.org
 - Toolkits
 - Manuals
 - Samples of successful tools, presentations, marketing materials
 - Research
 - Online learning modules
 - Information about other evidence-based programs
 - Fall prevention information

- U.S. Administration on Aging – Web page addressing the *Evidence-Based Disease Prevention Program*:
www.aoa.gov/AoARoot/AoA_Programs/HCLTC/Evidence_Based/index.aspx
 - Purpose of the Program
 - Highlights
 - State Awards

- RE-AIM
A framework for organizing program implementation and analysis
www.re-aim.org

- Agency for Healthcare Research and Quality (AHRQ)
AHRQ's mission includes both translating research findings into better patient care, and providing policymakers and other health care leaders with information needed to make critical health care decisions.
www.ahrq.gov

- Centers for Disease Control & Prevention (CDC)
Web pages dedicated to the older adult population
www.cdc.gov/aging/

- Oregon's Living Well Program
This is a web page a resources dedicated to Oregon's Living Well Program, which is their implementation of the CDSMP (it's the same as *Living Healthy*).
www.oregon.gov/DHS/ph/livingwell/index.shtml
 - Cost calculator
 - Videos
 - Marketing materials