



Oregon Living Well Fidelity Checklist

Workshop Leader(s) Name _____

Site/Workshop location _____

Date observed _____ Session Observed _____

Name of person doing observation _____

Please evaluate the Living Well with Chronic Conditions session on the following criteria by marking the appropriate items, or NA if “not applicable.” Make comments to add specific detail. For guidance in using this form, please refer to Recommended Use of Fidelity Checklist guidelines at www.healthoregon.org/livingwell.

Overall Issues (use in observing any/all sessions)

Fidelity Criteria	Comments
<p>General</p> <p><input type="checkbox"/> Arrived on-time with all materials for set up, start time & prepared to lead session</p> <p><input type="checkbox"/> Followed the Leaders Manual content and process</p> <p><input type="checkbox"/> Modeled session activities appropriately</p> <p><input type="checkbox"/> Worked as a partner with co-leader. Kept to timelines</p> <p><input type="checkbox"/> Posted correct agenda for the session</p> <p><input type="checkbox"/> Posted at all sessions: Self-Management Tool Box (chart 2); Guidelines (chart 3); and Brainstorming (chart 4); Parts of an Action Plan (chart 5); Problem-solving Steps (chart 6); Symptom Cycle (chart 7)</p> <p><input type="checkbox"/> Dark and color markers available</p> <p><input type="checkbox"/> Encouraged group participation</p> <p><input type="checkbox"/> Charts are readable</p> <p><input type="checkbox"/> Positively reinforced group members</p> <p><input type="checkbox"/> Handled problem people appropriately</p> <p><input type="checkbox"/> Room appropriate re: seating, lighting, temperature, ADA, noise and distractions, ability of all participants to see and hear</p> <p><input type="checkbox"/> Explained activities clearly</p> <p><input type="checkbox"/> Presentation style appropriate, pleasant. Maintained eye contact (unless culturally inappropriate), articulated clearly</p> <p><input type="checkbox"/> Accurately used own words to communicate meaning and important points</p> <p><input type="checkbox"/> Pointed to charts to reinforce content</p> <p><input type="checkbox"/> Referred to toolbox chart</p>	

Action Planning	Comments
<ul style="list-style-type: none"> <input type="checkbox"/> Modeled correctly. Explained process clearly <input type="checkbox"/> Explained confidence level correctly <input type="checkbox"/> Pointed to chart as participants stated action plans <input type="checkbox"/> Followed action plan flow chart to identify barriers if confidence level less than 7, and for getting ideas from the group <input type="checkbox"/> Demonstrated use of “will” instead of “try” 	
<p data-bbox="147 527 521 562">Feedback/Problem-Solving</p> <ul style="list-style-type: none"> <input type="checkbox"/> Asked participant to re-state action plan and pointed to chart to demonstrate <input type="checkbox"/> Complimented success and appropriate modification <input type="checkbox"/> Followed feedback flow chart <p data-bbox="147 772 521 808">If action plan not completed:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Asked about barriers and any solution used <input type="checkbox"/> Asked if help wanted from the group <input type="checkbox"/> Asked group if anyone had a similar problem <input type="checkbox"/> Used problem solving language <input type="checkbox"/> Brainstorm for 4 or 5 ideas <input type="checkbox"/> Limited “Yes, but...” to 3 <input type="checkbox"/> Suggested writing down ideas from brainstorm 	
<p data-bbox="147 1150 354 1186">Brainstorming</p> <ul style="list-style-type: none"> <input type="checkbox"/> Followed Fundamentals as in the manual <input type="checkbox"/> Clearly explained process, guidelines, and used chart to emphasize <input type="checkbox"/> Repeated participant ideas exactly as stated <input type="checkbox"/> Controlled timing to allow scribe to keep up <input type="checkbox"/> Scribe used no abbreviations and wrote exactly what leader repeated <input type="checkbox"/> Asked for permission from participant if needing to change the wording <input type="checkbox"/> Did not allow discussion until complete <input type="checkbox"/> Limited ideas to 15, then asked for 2 more before closing brainstorm, or stopped when easel pad filled <input type="checkbox"/> Reviewed list aloud (leader or scribe) <input type="checkbox"/> Allowed for clarification <input type="checkbox"/> Added ideas from Stanford manual at the end, and only those not identified in the brainstorm 	

Session 1 – Living Well Fidelity Checklist

Fidelity Criteria	Comments
<ul style="list-style-type: none"> ___ Agenda and appropriate session-specific charts as listed in Leaders manual are posted, name tags available ___ Participant Information forms distributed and collected 	
Activity 1 – Introduction of the Workshop	
<ul style="list-style-type: none"> ___ Appropriately introduced self and co-leader ___ Paraphrased scripted portions without adding or removing content ___ Accurately presented material on Charts, 1, 2 and 3 ___ Distributed and discussed overview and homework handout 	
Activity 2 – Group Introductions	
<ul style="list-style-type: none"> ___ Modeled introductions, 1-2 problems (not symptoms) caused by chronic condition ___ Redirected participants to name problems, not symptoms or health history ___ Accurately delivered instructions for introductions ___ Co-leader wrote problems on white board/chart pad. ___ Pointed out that problems are the same 	
Activity 3 – Mind Body Connection/Distractio	
<ul style="list-style-type: none"> ___ Used Charts 2 and 4 as directed in the script ___ Guided through lemon activity slowly ___ Clearly discussed brainstorm guidelines ___ Conducted brainstorm appropriately. No cross talk ___ Timed distraction techniques correctly 	
Activity 4 – Getting a Good Night’s Sleep	
<ul style="list-style-type: none"> ___ Paraphrased scripted portions without adding or removing content ___ Conducted brainstorm appropriately 	
Activity 5 – Introduction to Action Plans	
<ul style="list-style-type: none"> ___ Presented information on Chart 5; had it posted on wall. ___ Modeled action plan appropriately ___ Broke people into pairs, family members not paired with each other ___ Used a timekeeper ___ Summarized each action plan by using the standard: <ul style="list-style-type: none"> Something you want to do; Achievable; Action specific; Answers what, how much when, how often; Confidence level of 7 or more ___ For confidence levels less than 7, guided through identification of barriers ___ Informed participants that leaders will be calling them to support them in their plans the first week 	
Activity 6 – Closing	
<ul style="list-style-type: none"> ___ Reviewed 7 items ___ Followed activity timelines with 20 min break, and workshop ended on time within 2 ½ hours 	

Session 2 – Living Well Fidelity Checklist

Fidelity Criteria	Comments
<ul style="list-style-type: none"> ___ Agenda and appropriate session-specific charts as listed in Leaders manual are posted 	
<p>Activity 1 – Feedback</p>	
<ul style="list-style-type: none"> ___ Modeled feedback, stated action plan and level of success, asked for volunteer ___ Complimented appropriate action plan adjustment/modification ___ If action plan is not achieved, followed steps on flow chart ___ Conducted problem-solving brainstorm appropriately ___ Limited to 3 ‘yes buts,’ offered person to choose one idea ___ Recommended person make a note of suggestions offered ___ Modeled problem-solving steps appropriately; reviewed chart 6 	
<p>Activity 2 – Dealing with Difficult Emotions</p>	
<ul style="list-style-type: none"> ___ Utilized chart 7 to illustrate difficult emotions ___ Facilitators modeled own causes of difficult emotions correctly ___ Accurately delivered instructions for group activity: Reported for your partner; Info does not have to be shared ___ Checked with partners for accuracy ___ Conducted brainstorm appropriately (see Overall Issues) ___ Asked participants to volunteer any new things they are going to use to deal with these emotions in the future ___ Specified writing or journaling for dealing with difficult emotions ___ Asked participants to share something they are grateful for 	
<p>Activity 3 – Introduction to Physical Activity & Exercise</p>	
<ul style="list-style-type: none"> ___ Conducted brainstorm appropriately (see Overall Issues) ___ Utilized chart 8, paraphrased section appropriately ___ Instructed participants to open book to chapter 7; explained abbreviations of BB, VIP and hand weight icon ___ Asked participants to identify physical activity goal and barrier ___ Problem solved with 1-2 participants ___ Encouraged choosing a goal around physical activity 	
<p>Activity 4 – Preventing Falls and Improving Balance</p>	
<ul style="list-style-type: none"> ___ Conducted brainstorm appropriately (see Overall Issues) ___ Reviewed chart 9, paraphrased appropriately 	
<p>Activity 5 – Making An Action Plan</p>	
<ul style="list-style-type: none"> ___ Clearly utilized chart 5 – reminded participants that the plan should be something they want to do and be achievable ___ Conducted action plan appropriately (see Overall Issues) 	
<p>Activity 7 – Closing</p>	
<ul style="list-style-type: none"> ___ Reviewed 9 items listed in Leader’s manual ___ Followed activity timelines, workshop ended within 2 ½ hours. 	

Session 3 – Living Well Fidelity Checklist

Fidelity Criteria	Comments
<ul style="list-style-type: none"> ___ Agenda and appropriate session-specific charts as listed in Leaders manual are posted 	
Activity 1 – Feedback	
<ul style="list-style-type: none"> ___ Modeled feedback, stated action plan and level of success ___ Asked for a volunteer to start reporting back from the group; then went around the circle from that person (see “Overall” section) 	
Activity 2 – Making Decisions	
<ul style="list-style-type: none"> ___ Accurately delivered activity, using charts 10 and 11 ___ Delivered decision-making activity correctly, broke group into pairs, did not exceed 10 minutes ___ Asked 1 or 2 pairs to share using points 1-3 	
Activity 3 – Pain and Fatigue Management	
<ul style="list-style-type: none"> ___ Clearly delivered activity ___ Appropriately brainstormed using different color markers to represent pain and fatigue 	
Activity 4 – Endurance Exercise	
<ul style="list-style-type: none"> ___ Clearly delivered activity, using charts 7, 12, 13, 14 ___ During endurance monitoring, one leader marched in place and the other led the orchestra ___ Suggested that participants keep a log of physical activity done each day 	
Activity 5 – Relaxation: Body Scan	
<ul style="list-style-type: none"> ___ Let participants know participation is optional ___ Conducted activity appropriately by reading or using CD ___ Encouraged participants to give activity a 2-week try ___ Mentioned that the script is printed in the book 	
Activity 6 – Making an Action Plan	
<ul style="list-style-type: none"> ___ Used chart 5 to remind participants that a plan should be something they want to do and realistic ___ Conducted action plan appropriately (see “Overall” section) 	
Activity 7 – Closing	
<ul style="list-style-type: none"> ___ Reviewed all 8 items listed in Leader’s manual ___ Followed activity timelines with 20 minute break, and workshop ended within 2 ½ hours. 	

Session 4 – Living Well Fidelity Checklist

Fidelity Criteria	Comments
<ul style="list-style-type: none"> <input type="checkbox"/> Agenda and appropriate session-specific charts as listed in Leaders manual are posted 	
Activity 1 – Feedback	
<ul style="list-style-type: none"> <input type="checkbox"/> Modeled feedback, stated action plan and level of success <input type="checkbox"/> Asked for a volunteer to start reporting back from the group; then went around the circle from that person (see “Overall” section) 	
Activity 2 – Better Breathing	
<ul style="list-style-type: none"> <input type="checkbox"/> Accurately delivered activity, using chart 15 <input type="checkbox"/> Conducted brainstorm appropriately <input type="checkbox"/> Correctly demonstrated pursed lip breathing & diaphragmatic breathing technique 	
Activity 3 – Healthy Eating	
<ul style="list-style-type: none"> <input type="checkbox"/> Facilitator modeled what was learned from food diary & asked 4-5 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	
<ul style="list-style-type: none"> <input type="checkbox"/> Clearly delivered activity, clearly explained “I” messages <input type="checkbox"/> Delivered role-plays accurately 	
Activity 5 – Problem Solving	
<ul style="list-style-type: none"> <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	
<ul style="list-style-type: none"> <input type="checkbox"/> Used chart 5 to remind participants that a plan should be something they want to do and realistic <input type="checkbox"/> Conducted action plan appropriately (see “Overall” section) 	
Activity 7 – Closing	
<ul style="list-style-type: none"> <input type="checkbox"/> Reviewed all 7 items listed in Leader’s manual, encouraging choosing new buddies to call <input type="checkbox"/> Followed activity timelines with 20 minute break, and workshop ended within 2 ½ hours. 	

Session 5 – Living Well Fidelity Checklist

Fidelity Criteria	Comments
<ul style="list-style-type: none"> ___ Agenda and appropriate session-specific charts as listed in Leaders manual are posted 	
Activity 1 – Feedback	
<ul style="list-style-type: none"> ___ Modeled feedback, stated action plan and level of success ___ Asked for a volunteer to start reporting back from the group; then went around the circle from that person (see “Overall” section) 	
Activity 2 – Making Healthy Food Choices	
<ul style="list-style-type: none"> ___ Clearly presented activity, using of chart 19 ___ Ensured that correct answers were clearly provided to all the questions ___ Had supply of labels available for participants who needed them ___ Was familiar and comfortable with the label and information in the Living a Healthy Life book. 	
Activity 3 – Medication Usage	
<ul style="list-style-type: none"> ___ Clearly presented activity, using charts 20, 21, and 22. ___ Conducted brainstorm and problem-solving appropriately 	
Activity 4 – Making Informed Treatment Decision	
<ul style="list-style-type: none"> ___ Clearly presented activity, using chart 23 	
Activity 5 – Depression Management	
<ul style="list-style-type: none"> ___ Clearly presented activity, using chart 7 ___ Reminded participants that alcohol and some drugs can make depression worse. ___ Noted need for professional treatment for severe depression. 	
Activity 6 – Positive Thinking	
<ul style="list-style-type: none"> ___ Clearly presented activity, using chart 24 ___ On initial examples, one leader read the negative, and the other read the positive ___ Allowed time for participants to suggest changes for negative statements 	
Activity 7 – Making an Action Plan	
<ul style="list-style-type: none"> ___ Used chart 5 to remind participants that a plan should be something they want to do and realistic ___ Conducted action plan appropriately (see “Overall” section) 	
Activity 8 – Closing	
<ul style="list-style-type: none"> ___ Reviewed all 7 items listed in Leader’s manual ___ Followed activity timelines with 20 minute break, and workshop ended within 2 ½ hours 	

Session 6 – Living Well Fidelity Checklist

Fidelity Criteria	Comments
<ul style="list-style-type: none"> ___ Agenda and appropriate session-specific charts as listed in Leaders manual are posted 	
<p>Activity 1 – Feedback</p>	
<ul style="list-style-type: none"> ___ Modeled feedback, stated action plan and level of success ___ Asked for a volunteer to start reporting back from the group; then went around the circle from that person (see “Overall” section) 	
<p>Activity 2 – Working with Your Health Care Professional and Health Care System</p>	
<ul style="list-style-type: none"> ___ Accurately presented activity, using chart 25 ___ Clearly defined health care system vs. health care provider ___ Conducted brainstorm and problem-solving appropriately 	
<p>Activity 3 – Weight Management</p>	
<ul style="list-style-type: none"> ___ Clearly presented activity, using chart 26 ___ Asked for volunteers to share food diary, and managed group sharing of ideas appropriately 	
<p>Activity 4 – Looking Back and Planning for the Future</p>	
<ul style="list-style-type: none"> ___ Clearly delivered activity, reviewing chart 7 ___ Clearly modeled 3-6 month goals, and steps to reaching goal ___ Clearly model sharing of accomplishments, allowing participants to share their accomplishments and pointing out how they helped each other ___ Appropriately delivered guided imagery activity 	
<p>Activity 5 – Closing</p>	
<ul style="list-style-type: none"> ___ Reviewed all 5 items listed in Leader’s manual ___ Followed activity timelines with 20 minute break, and workshop ended within 2 ½ hours 	