

Section III

LEADER AND MASTER TRAINING



Identifying and Training Leaders

Potential leaders should be able to commit to successful completion of a four-day training, in addition to offering two six-week workshops per year, including prep time for each session. These individuals should be comfortable facilitating a workshop in front of a group and should be organized and prompt in order to offer the session each week.

It is strongly recommended that at least one of the co-facilitators of each workshop is a community member with a chronic condition. When recruiting individuals to become trained leaders, a balanced combination of peer community members and professional staff for whom Living Well will be part of their job duties is essential in order to offer the program as it was designed by Stanford. Many times, a great workshop participant will make a great trained leader – particularly if they are very committed and enthusiastic about the program. Sometimes, trained health professionals may find it challenging to step out of their professional role and facilitate the workshop as a peer.

Leaders are authorized to lead the chronic disease self-management workshop in which they were trained. To become a leader, one must complete leader training and have led at least two workshops in the first year after training.

Master Trainers are authorized to train *only* leaders to lead the self-management workshop. To become a certified Master Trainer, one must: 1) complete Master training, 2) co-facilitate at least two community workshops in the first year; and 3) co-facilitate one leader training.

T-Trainers are authorized to train Master Trainers and/or leaders. This authorization will only be granted after an apprenticeship training with a Stanford staff trainer. To qualify for an apprenticeship, one must have facilitated at least two workshops and three leader trainings. One must write to Stanford University and request an application if interested in becoming a T-Trainer.*

The full details and extent of the commitment of becoming a trained leader should be explained to every person interested in becoming a leader. This will help avoid training leaders that do not go on to facilitate any workshops. Some Living Well programs have even used a job description with their trained leaders to help assure that the commitment to being a Living Well leader is taken seriously.

* Stanford University Licensing Web site: <http://patienteducation.stanford.edu/licensing/>

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The Stanford Living Well workshop and training curricula are highly structured. Individuals must attend a four-day training to be able to offer workshops in their community. **It is absolutely necessary that leaders attend the entire four-day training in order to be able to offer Living Well workshops.** If interested individuals cannot attend one day of the scheduled training, they will have to attend a different leader training, or only in the case of an emergency, can a leader in training make up a training day at another scheduled training. Stanford recommends for leaders to be trained by the same Master Trainers over the entire four days.

Oregon DHS maintains a list of all of the Living Well leader trainings being offered throughout the state. This list is available online at http://oregon.gov/DHS/ph/livingwell/lwleadersmt_top.shtml. At this time, most leader trainings are free of charge to attend. However, each participant must be affiliated with a licensed organization in order to attend the leader training.

Individuals may participate in either an English Living Well leader training or a Spanish Tomando Control leader training, but if they wish to be able to offer both workshops, they must attend each four-day leader training (a total of eight days of training). Individuals who would like to offer the PSMP must attend the four-day English Living Well leader training and an additional one-day training specific to the PSMP (a total of five days of training).

After an individual attends and completes a leader training, they must facilitate two workshops within their first year of being trained in order to be considered certified. After that, the leader must facilitate at least one workshop per year in order to maintain their certification.

Program	Training Commitment
Living Well	Four full days, two workshops led within one year
Tomando Control	Four full days, two workshops led within one year
Positive Self-Management	One day + completed Living Well four-day training, two workshops led within one year

Master Training

Leaders are trained by Master Trainers, who attend a four and-a-half-day training at Stanford University in order to be able to train other leaders. Master Trainers are trained by T-Trainers that participate in an apprenticeship program at Stanford University and have received their T-Trainer Agreement and Authorization form signed by Kate Lorig, RN, MPH. Oregon has over 60 Master Trainers throughout the state that offer regular leader training.

Trained leaders that have become certified may become Master Trainers by attending a four and-a-half-day Master Training at Stanford University. More information about Master Training can be found on the Stanford Web site at <http://patienteducation.stanford.edu/training/>. Master Training can also be arranged through Stanford to take place anywhere in the nation if an organization has funding to pay training fees and T-Trainer costs directly to Stanford.

Fidelity Issues in Leader Training

Leader training for Living Well provides participants with training and skills, and models the correct process for leading a community workshop. As with community workshops, there are key fidelity issues in offering leader training. Organizations that wish to modify the training in any way must consult with Stanford University before making any changes. Some key fidelity issues include:

- Training is offered as designed—a four-day training for Living Well or Tomando Control, and a five-day training (or additional one-day training beyond the basic Living Well) for PSMP. Stanford stresses that the training should be completed within two weeks – so the training can be offered all at once (four consecutive days) or two days each on two consecutive weeks. Stanford does not support training being compressed into anything less than four days, particularly because many training participants are living with chronic conditions, for whom sitting for more than eight hours per day may not be an option.
- There are at least eight, and not more than 20 confirmed participants in the training. Stanford strongly recommends that training not be offered with less than 10 registered, which allows for the possibility that one or two participants may not be able to make the training. Leader training models community workshops, and requires the same minimum numbers to be successful.
- Training follows the scripted Master Trainer Manual.
- Training is facilitated by two licensed Master Trainers who have each led at least two community workshops. Master Trainers must offer at least one community workshop or one leader training per year to maintain their current license status as Master Trainers.
- Trainees complete the full four-day training, and successfully complete practice teaching sessions (days two and four).
- Training is monitored to ensure that it is implemented with fidelity. See below for recommended approaches to program monitoring.

Fidelity Monitoring of Leader Training

Organizations offering leader training are encouraged to use a standardized observation checklist to monitor a half-day segment of the multi-day leader training. This is ideally done by a T-Trainer, but can also be done by an experienced Master Trainer or even a highly experienced leader using a checklist. The Master Trainer is observed during one or more sections of the leader training, ideally to include one or more of the practice teaching sessions and the fishbowl exercise. The observer follows up with the Master Trainers to share constructive feedback, particularly if any concerns are identified. Each leader should be observed for one session of their first program, and then for one session of a workshop on a regular basis, ideally on an annual basis. See the recommended leader training checklist in the appendix or online at <http://oregon.gov/DHS/ph/livingwell/resources.shtml>.

What Living Well leaders and Master Trainers say about the program

"Within each first session, I become a welcomed partner in the group and am always inspired by how determined participants were to succeed and change their lives, no matter what the barriers or difficulties that life has served them. These interactions actively changed my life and helped direct me to a live a healthier life."

"Every time I facilitate a Living Well workshop or leader training, I learn something new. I'm reminded about how to manage my own chronic conditions better. I could say it keeps me personally honest and on track. Helping others get there is the icing on the cake. I really feel that being a leader and Master Trainer is a privilege."

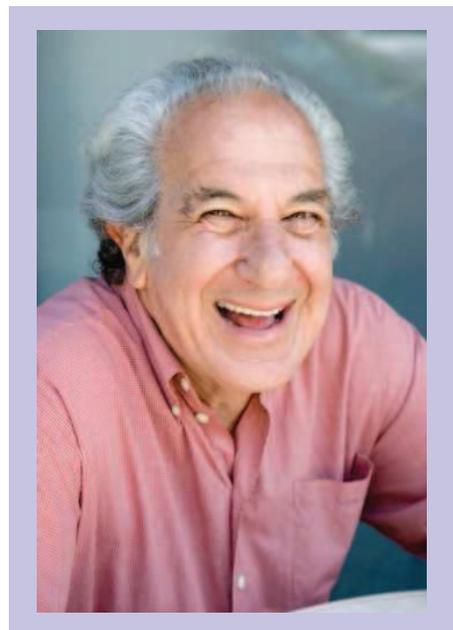
Leader Training Logistics

What Living Well participants say about the program

“As I was encouraged to set manageable goals each week, I found benefit in the positive sense of accomplishment and empowerment that resulted from accomplishing the plan. I also appreciated the resulting notion that positive, forward progress in easing my condition was possible.”

As with community workshops, coordination of a leader training requires attention to detail to assure that the training runs smoothly and is provided with fidelity to Stanford guidelines. See the Training Logistics Checklist in the appendix to learn more about the resources needed to offer a leader training. This checklist helps organizations and Master Trainers involved in planning a leader training to assure all steps are taken.

A generic version of the Oregon leader training application is located in the appendix. Organizations are welcome to contact DHS for an editable version of this application form to use for any trainings they offer. Email DHS at living.well@state.or.us.



Communication with DHS

- Scheduled leader training** - Please let DHS know two to three months ahead if you plan to offer a leader training. If you are willing to accept leaders from outside of your organization in your training, DHS will post the training on the statewide Web site. In either case, DHS may be able to support your training with leader manuals and books, as long as the training meets Stanford's requirements for leader training.

- Names and contact information for newly trained leaders** - Please send DHS (living.well@state.or.us) a list of those you have trained as leaders, along with their email, address and phone number. DHS maintains a statewide registry of trained leaders and Master Trainers, which is used to help organizations identify trained individuals in their region, and uses the contact information to invite new leaders to join the Oregon Living Well listserv, and invite them to statewide events like the annual Living Well Forum.

What Living Well participants say about the program

"This program has helped to realize we are not alone in our illnesses, though each are different. We can help each other by encouraging each other to take just one day at a time and do our best for the one day, so the future doesn't look so bleak."