



Statewide CDSMP Collaborative

Fidelity Visit Policy Manual

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Developed by Statewide CDSMP Fidelity Workgroup:

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Our mission: The Statewide CDSMP Collaborative provides guidance to promote, implement, and coordinate the sustainability and expansion of the Chronic Disease Self-Management Program Series statewide.

The purpose of the Fidelity Visit Policy is to establish a standard of best practices and to build capacity for a trained Fidelity Corps for fidelity observations as outlined by the Statewide Chronic Disease Self-Management Program (CDSMP) Collaborative.

All Statewide CDSMP Collaborative members have agreed to support these fidelity policies and procedures in order to maintain the highest quality classes.

What is Program Fidelity?

Fidelity refers to how closely Leaders and Master Trainers follow and deliver the curriculum as intended by the program developers at Stanford University. This includes consistency of delivery and program timing.

All Stanford programs are evidence-based which means that their effectiveness has been measured and the results can be duplicated if the program is delivered in a consistent manner. Program fidelity applies to all Stanford self-management programs offered in Colorado, no matter who holds the License, or what the class series is called (Be Well, Living Well, Healthier Living Colorado, etc.). The curriculums available in Colorado are:

- Chronic Disease Self-Management
- Tomando Control de su Salud
- Diabetes Self-Management Program
- Tomando Control de su Diabetes
- Chronic Pain Self-Management Program
- Positive Self-Management for People with HIV/AIDS

The Statewide CDSMP Collaborative will follow the Stanford recommended standards for fidelity. Additional resources have been considered in the development of the fidelity process including the Oregon Living Well Network and National Council on Aging (NCOA).

<http://patienteducation.stanford.edu/licensing/FidelityManualOct2011.pdf>

<http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Pages/fidelity.aspx>

<http://www.ncoa.org/improve-health/center-for-healthy-aging/content-library/NYS-CDSMP-Fidelity-Guidance-Manual.pdf>

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Why is Fidelity Important?

Program delivery that is not true to the original design and intention decreases the likelihood that the desired outcomes will be obtained. Poor fidelity can result in a range of unintended effects, not only for participants but for leaders, trainers, and organizations alike. Fidelity is necessary for a quality program, for maintaining a cost-effective program, and for scaling the program's reach to meet the needs of those with chronic conditions across Colorado.

Key Fidelity Elements for the Statewide CDSMP Collaborative

All Statewide CDSMP Collaborative members holding Licenses will provide Leader fidelity checks and include adherence to these key elements:

- Programs are offered as designed, including:
 - Two and one-half hour sessions offered over six weeks
 - Following the script consistently
 - Avoid adding additional topics or outside materials
 - Avoid offering medical or alternative health advice
 - Effectively using key program elements including problem solving, brainstorming, and action planning
 - Led by two trained Leaders, preferable with at least one of whom has a chronic condition
- Class series are designed to be offered to 10-15 participants. It is suggested that Class series should not be started with fewer than 8 enrollees in order to be effective. Smaller rural areas may choose to hold a class series with fewer people.
- Both Leaders must have completed a four day leader training offered by two certified Master Trainers.
- Both Leaders must have completed the 2012 CDSMP Curriculum Update in order to co-lead class series in the revised curriculum.
- Leaders must facilitate at least one community class series each 12 months as determined by their certification date.
- Master Trainers must co-facilitate at least one Leader Training or one community class series each 12 months as determined by their certification date.
- Leaders who do not facilitate a class during the twelve month period following their last completed class must attend a “refresher training” before returning to the classroom.
- Class series are monitored statewide to assure that they are being implemented with fidelity.

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Statewide CDSMP Collaborative Fidelity Corps

Fidelity Core Training is a three hour curriculum and an accompanying manual adopted by the Statewide CDSMP Collaborative. The training will be held a minimum of once annually in various locations statewide. This training is available to experienced Master Trainers and program Leaders by invitation and includes:

- Relationship building: the essential ingredients in any fidelity visit.
- The importance of fidelity visits in evidence-based programs.
- Fine-tuning the key skills of Action Planning, Problem Solving, and Brainstorming.
- Lessons learned together in classes across the state.
- Listening to the Leader's concerns.
- How the Statewide CDSMP Collaborative works and what is new and coming soon for members: research projects, new curriculums, data collection, and paperwork.
- Making the most of the fidelity visit.
- Frequently asked questions.
- Fidelity visit paperwork sent to the Leader, Agency, and Collaborative.
- Protocols, reporting mechanisms and evaluation tools.

Fidelity Corps Chair

- The Statewide CDSMP Collaborative will designate a Fidelity Corps Chair who will be assisted by a Fidelity Workgroup. The first chair will serve through December 31, 2013. Subsequent Fidelity Corps Chairs will serve a twelve month term beginning January 1st.
- The Fidelity Corps Chair will be responsible for coordinating observations, coordinating payment for observations with the current funder for the given project (if applicable depending on the project), scheduling and conducting Fidelity Corps trainings, sharing this information with the current funder, and updating the fidelity information on the Statewide CDSMP Collaborative database and website.

Fidelity Observation Process

1. Leaders will be evaluated every 12 months using the approved fidelity checklist. The approved checklist is available on the SelfManagementColorado.org website.
2. Observation and completion of the fidelity checklist should be done by a member of the Statewide CDSMP Collaborative Fidelity Corps and be able to provide constructive feedback in a positive way.
3. Programs that do not have a trained observer available can access the Fidelity Corps at SelfManagementColorado.org for a listing of those in their area who might be able to observe programs.

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4. It is recommended that the fidelity visit take place during sessions 2-5 in order to ensure observation of action planning, feedback/problem solving, and brainstorming.
5. If the fidelity visit is planned for a class series that is not being taught in English, the Agency or Collaborative may request the assistance of Master Trainers and/or Certified Leaders as needed.
6. Approval for payment to Fidelity Corps observers (if applicable depending on the project) must be received from the funder for the given project. The funder will issue the payment and track W-9s and 1099s as required.
7. A typewritten copy of the completed Fidelity Checklist will be given to the Leaders, the Fidelity Corps Chair, and the License holder. Information will be made available to the funding agency for the project.
8. Each Leader will be given a copy of the Fidelity Review Appeal Process upon completion of the review. Contact information for the Fidelity Corps Chair and the Collaborative Chair will be included.

Fidelity Observation Logistics

1. The Fidelity Corps Chair will coordinate with the funding agency and arrange for the visit with a Fidelity Corps member.
2. Once the Fidelity Corps observer has been confirmed they will contact the class Leaders.
3. Leaders should be notified by the Fidelity Corps observer or program coordinator at least one week in advance that they will be observed. Leaders should ask their group if they would be willing to be observed.
4. The Fidelity Corps observer should arrive before the program begins, stay through the full session, and plan for a minimum of thirty minutes with the Leaders to discuss their evaluation following the class.
5. The observer should be introduced briefly to the group and sit in the back of the room, not joining in as a participant.
6. The Fidelity Corps observer should use one checklist for each leader. The checklist helps to identify program logistic issues, leader strengths and possible areas for improvement. Comments are encouraged to provide feedback that will be helpful to the Leader.
7. Both the Leader being observed and the co-leader will receive feedback since both Leaders are assumed to be actively involved in every class.
8. The Fidelity Corps observer will follow up with leaders immediately after observation to share the feedback. Leaders should plan on remaining an additional one-half hour after the class is completed to meet with the observer for discussion.
9. A typed checklist should be returned to the Fidelity Corps Chair, to each Leader, and the Licensed organization.

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10. If a leader scores below an average of "2" on Part II of the checklist, another observation may be scheduled with a trained Fidelity Corps observer and the License holding agency shall be notified. It is each observer's responsibility to comment /explain any score below a "two".
11. If there are serious concerns, a Leader should be re-observed before their next class series begins to ensure that recommended changes have been made. If concerns continue, a Master Trainer who has completed the Fidelity Corps training will be requested to work with the Leader one-on-one to correct the problem. The Fidelity Corps observer needs to document their concerns and share the concerns with the Leader and the License holder. The License holder and/or Collaborative may then consider not using that Leader for future co-leading assignments.
12. License holders will be responsible for monitoring their Leaders to ensure they have been observed co-leading their first class series and at least every twelve months thereafter. License holders are also responsible for submitting Leader fidelity information to the Statewide CDSMP Collaborative.

Fidelity Review Appeal Process

The following Appeal process is available to the Leader in the event there is a question about the results of the fidelity visit (for example, if a Leader is not recommended or is disputing the finding of their fidelity visit).

1. The Leader notifies the Fidelity Corps Chair of the appeal within 15 days of the fidelity visit.
2. The Fidelity Corps Chair meets with the Leader, Fidelity Corps Observer, and the License holder and discusses the evaluation. A joint plan of action will be developed and mutually agreed upon by the Leader, License holder, and Fidelity Corp Chair.
3. Should the issues not be resolved through an agreed upon joint plan of action, the Fidelity Corps Chair will schedule an additional observation by a different trained Fidelity Corps observer at the next class or prior to the beginning of the next class series.
4. If the additional observation of the leader by a different Fidelity Corps Observer yields the same findings, the decision (for example, a Leader is not recommended) shall be final.

Fidelity Visits Payment Process

Fidelity visits may be reimbursable within the scope of specific project funding. The Collaborative will determine the rate of reimbursement (if applicable). Payment must be pre-approved by the Fidelity Corps Chair in collaboration with the funder for the project.

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Additional Recommendations

It is strongly recommended that the License holder conduct a fidelity visit at classes being offered at a new site. This visit offers insights into the scheduling conflicts, the personality of the participants, and the management style of the site coordinator. This information can be used to avoid scheduling conflicts, increase retention, and build toward an on-going relationship. The visit confirms the importance of the class, the Leaders, and the choice of the site.

It is strongly recommended that the License holder conduct a fidelity visit when Leaders are teaching in a new pairing. This visit offers the opportunity to ensure that the leaders are comfortable working together.

To determine if a fidelity visit is needed, if reimbursement is available, or to schedule a class observation contact the Statewide CDSMP Collaborative.

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Statewide CDSMP Collaborative Fidelity Checklist

Leader Name _____ Date _____

Workshop Location _____

Fidelity Corps Member Conducting Visit _____

Date Follow-Up Sent to Agencies & Collaborative _____

Leader Checklist Part One	Yes/No	Comments
Prepared for class		
• Arrives on time		
• Necessary supplies on hand		
• Prepared to teach		
• Correct charts in place		
Leader Checklist Part Two	1-3 Scale*	Comments
Follows the CDSMP curriculum content and process		
Facilitates group activities appropriately including		
• Brainstorming		
• Action Planning		
• Feedback		
• Problem Solving		
Positively reinforces group members/encourages group participation		
Handles difficult situations or disruptions effectively		
Speaks effectively in front of a group		

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Approved by the Statewide CDSMP Collaborative
 Effective Date 3/15/13

<ul style="list-style-type: none"> • Body language • Eye contact • Voice projection/volume • Pace 		
Engaged throughout entire class		
Non-judgmental of people and/or choices		
Models activities appropriately		
Manages time appropriately		
Works cooperatively with co-leader		
TOTAL of Part Two		
AVERAGE Score (TOTAL divided by the number of scores)		

*** 1-3 Scale Legend:**

1- Additional practice recommended.

2- Meets expectations and demonstrates understanding of the process.

3- Demonstrates mastery.

N/A- did not see this during class observation

Leader needs to have an average score of "2" on the Leader Checklist Part Two

Other Comments:

Please Note: Final Fidelity Checklists should be typewritten before submitting to the Fidelity Corp Chair, Leaders and Program Coordinator.

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Sample Fidelity Checklist

Leader Name Kate Lorig Date 4/22/2013
 Workshop Location Stanford Education Center, Room 121
 Fidelity Corps Member Conducting Visit Jane Doe
 Date Follow-Up Sent to Agencies & Collaborative 4/26/2013

Leader Checklist Part One	Yes/No	Comments
Prepared for class	Yes	Room set-up and ready for participants.
<ul style="list-style-type: none"> • Arrives on time 	Yes	Separate brainstorming charts used, water available.
<ul style="list-style-type: none"> • Necessary supplies on hand 	Yes	Leaders divided activities ahead of time and were prepared to teach.
<ul style="list-style-type: none"> • Prepared to teach 	Yes	Charts visible, neat and organized.
<ul style="list-style-type: none"> • Correct charts in place 	Yes	
Leader Checklist Part Two	1-3 Scale*	Comments
Follows the CDSMP curriculum content and process	2	Kept on schedule without making participants feel rushed. Understands and demonstrates CDSMP process.
Facilitates group activities appropriately including	2	Good job reviewing the guidelines. Remember to re-read the brainstorm ideas and ask for clarification at the end. Do not comment on participants' ideas.
<ul style="list-style-type: none"> • Brainstorming 	2	Very concise in reporting previous week action plan and modeling making an action plan.
<ul style="list-style-type: none"> • Action Planning 	2	Excellent job in following feedback flowchart by congratulating completed or modified action plans. Problem-solved as appropriate with participants
<ul style="list-style-type: none"> • Feedback 	3	

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		that did not complete action plan.
<ul style="list-style-type: none"> • Problem-Solving 	2	Good time management skills during problem-solving and brainstorming activities. Kept group on track and focused on the topic.
Positively reinforces group members/encourages group participation	3	Enthusiastic and confident leader style that encouraged participation. Fostered a trusting and safe atmosphere.
Handles difficult situations or disruptions effectively	2	State time limits so participants won't monopolize the activity, this will also minimize disruptions and help to stay on track.
Speaks effectively in front of a group <ul style="list-style-type: none"> • Body language • Eye contact • Voice projection/volume • Pace 	3	Very controlled, pleasant voice. Presents information in a calm manner allowing participants to feel safe. Voice pitch is at good volume for all to hear without straining and does not rush through content.
Engaged throughout entire class	1	Be sure to follow along when co leader is presenting to be able to help if they get in a bind. When participants see leaders using their phone, they will assume it is ok for them to as well.
Non-judgmental of people and/or choices	2	You are warm and welcoming which sets the tone for a relaxed and trusting group atmosphere.
Models activities appropriately	2	Consistent modeling during activities – great job demonstrating pursed-lip breathing and belly breathing.
Manages time appropriately	2	Activity 3 ran long, but good job getting back on track and ending on time without omitting any information.
Works cooperatively with co-leader	2	Nice job supporting each other, you complement each other well.

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TOTAL of Part Two	28	
AVERAGE Score (TOTAL divided by the number of scores: 13)	2.2	

*** 1-3 Scale Legend:**

- 1- Additional practice recommended.**
- 2- Meets expectations and demonstrates understanding of the process.**
- 3- Demonstrates mastery.**

N/A- did not see this during class observation

Leader needs to have an average score of "2" on the Leader Checklist Part Two

Other Comments:

"Leader" did a nice job paraphrasing and working with co-leader. You have developed a trusting, open class atmosphere and participants respond well to you. Brainstorming is a valuable tool to generate ideas and solutions. Follow the guidelines closely. Do not comment or allow anyone else to comment on ideas during the brainstorm process.

Please Note: Final Fidelity Checklists should be typewritten before submitting to the Fidelity Corp Chair, Leaders and Program Coordinator.

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Statewide CDSMP Collaborative Fidelity Corps Training Agreement

Name:	
Address:	
Phone Number:	
Email Address:	
Organization Holding the License for the above mentioned person:	
Date of Fidelity Training:	

The Fidelity Coach/Observer must be a Master Trainer or experienced Leader in the curriculum they are evaluating. Check as many classes as the Fidelity Coach/Observer is qualified to evaluate:

- | | | |
|---|---|---|
| <input type="checkbox"/> Chronic Disease Self-Management Program: | <input type="checkbox"/> Master Trainer | <input type="checkbox"/> Experienced Leader |
| <input type="checkbox"/> Diabetes Self-Management Program: | <input type="checkbox"/> Master Trainer | <input type="checkbox"/> Experienced Leader |
| <input type="checkbox"/> Chronic Pain Self -Management Program: | <input type="checkbox"/> Master Trainer | <input type="checkbox"/> Experienced Leader |
| <input type="checkbox"/> Tomando Control de su Salud: | <input type="checkbox"/> Master Trainer | <input type="checkbox"/> Experienced Leader |
| <input type="checkbox"/> Tomando Control de su Diabetes: | <input type="checkbox"/> Master Trainer | <input type="checkbox"/> Experienced Leader |
| <input type="checkbox"/> Other: _____ | <input type="checkbox"/> Master Trainer | <input type="checkbox"/> Experienced Leader |

License Holders will follow the Stanford recommended standards for fidelity, adopted by the Statewide CDSMP collaborative. I acknowledge and agree to the following:

1. I have successfully watched the webinar and understand all aspects of being a Statewide CDSMP Collaborative Fidelity member of the Fidelity Corps.
2. I have downloaded the Fidelity Manual from the Statewide CDSMP Collaborative.
3. I will abide by the Statewide CDSMP Collaborative Fidelity Policy.

Signature

Date

Please return completed form to:

Lynnzy McIntosh, Collaborative Chair:

- Fax - 303-984-5962
- Mail - 2575 S. Wadsworth Blvd., Lakewood, CO 80227
- Email - Lynnzy@COAW.org

Action Plan and Feedback Flow Charts

The following flow charts are designed to help the Leader make decisions on how to help a participant make an Action Plan or problem-solve barriers either during the Action Plan or Feedback activities.

It can help in two ways:

1. The Leader can use the charts to prepare for the Action Plan and Feedback activities
2. The Co-Leader can follow the chart while the Leader facilitating is working with a participant, reminding him/her if something is missed

Brainstorming Fundamentals for Leaders

- Repeat the ideas while looking at group, not to the scribe.
- The scribe should listen only to the co-Leader.
- The facilitator controls the “traffic”, glancing at the board occasionally to make sure the scribe is caught up.
- Do not allow questions until after the brainstorm is over.
- Do not comment or allow anyone else to comment on the ideas (positively or negatively, verbally or by facial expression).
- Clarification should not be obtained until **after** the brainstorm.
- If there are less than 15 ideas, use silence ...**W...A...I...T...!** (it’s not over until you have counted to 15 to yourself with no new ideas).
- If there are 15 ideas, tell the group you will take 2 more and end the brainstorm.
- Do not call on people.
- Write down the ideas in the contributor’s words. If you want to shorten or rephrase them, ask permission first.
- Do not use abbreviations or symbols.
- Read the list to the group after the brainstorm, and then ask if anyone needs clarification.

Making an Action Plan Flow Chart

One Leader stands at Chart 5, pointing to “What”

What is your Action Plan for this week?

Doesn't want to do one

OK, but if you change your mind, we'll check back with you when everyone has shared theirs, or you can catch me or *[name of other Leader]* after class.

Move on

Shares plan

Leader points to “How much” and waits for participant to answer question - then does the same for “When”
“How often”
“Confidence level”

Plan is clear and confidence level is 7+

Thank you! We look forward to hearing about how it went next week.

Move on

Doesn't know what he/she would like to do
OR
Parts are missing or unclear
OR
Low confidence level

Go to next page to continue flow chart

Making an Action Plan Flow Chart (continued from previous page)

Plan is clear, but confidence level less than 7

One Leader points to "Confidence" on Chart 5

Your confidence level is under 7, which tells us that you are unsure that you can complete your plan. What is it that makes you unsure?

What do you think you could do to your plan that would make you more sure?

[prompt if nothing is offered:]

Could less time or fewer days help you feel more sure?

Participant has adjusted plan

Great! Could you please restate you plan, starting with "I will"?

Move on

Participant doesn't have ideas

Would you like some ideas from the group?

NO

We need to go to the next person. *[Name of other Leader]* and I will be available at break or after class, if you'd like more help.

Move on

YES

Brainstorm ideas from the group, asking person to keep track of ideas

Ask if any of the ideas were helpful, ask to restate plan, starting with "I will".

Move on

Doesn't know what to do, parts missing or unclear

Go to next page to continue flow chart

Making an Action Plan Flow Chart (continued from previous page)

Plan is unclear, missing parts, or participant doesn't know what he she wants to do

The more specific the plan, the greater chance of success!

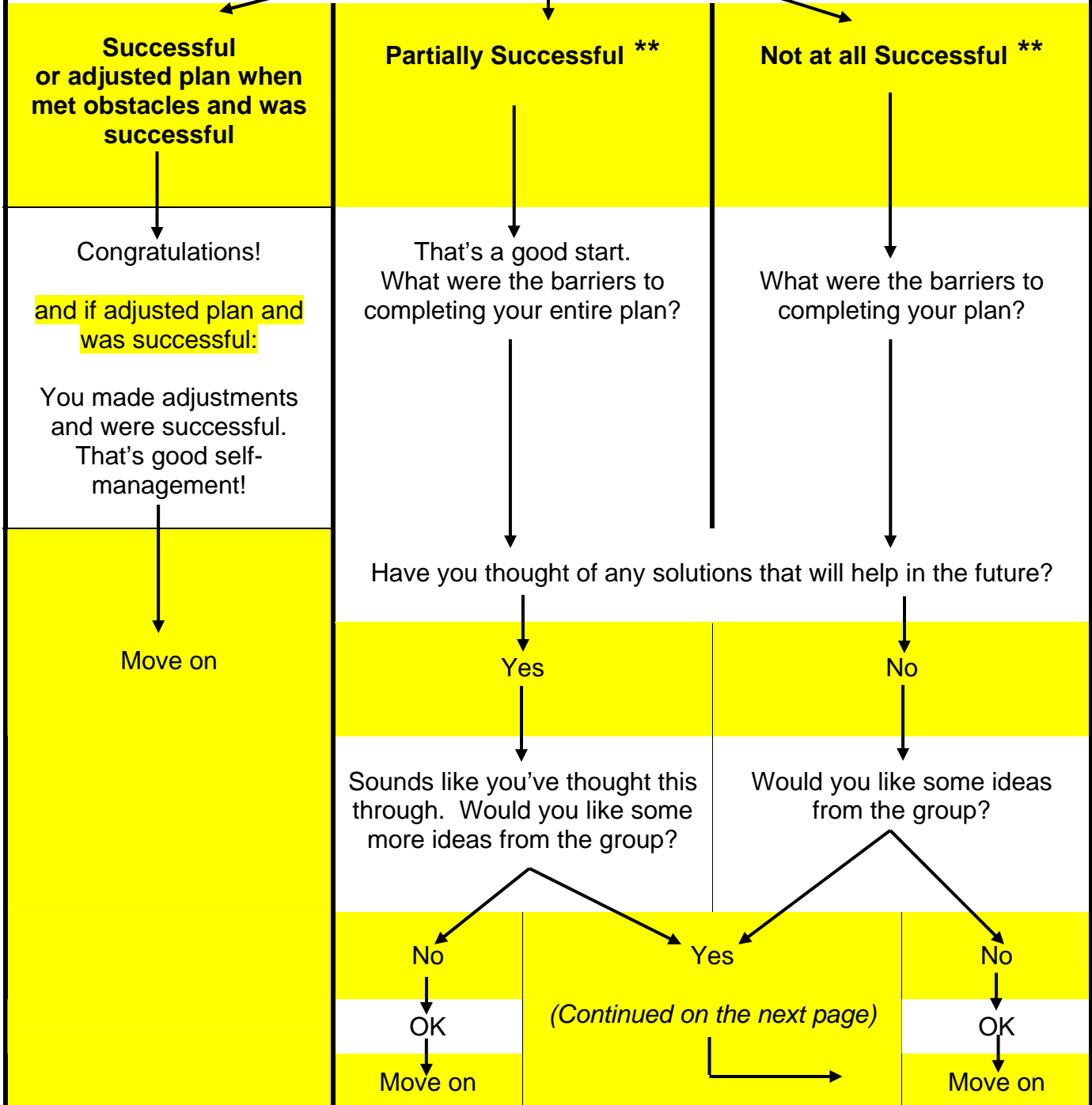
Leader points to each section of the plan on Chart 5 while discussing these

Doesn't know what to do	<u>"What"</u> is not clear	<u>"How much"</u> is not clear or missing	<u>"When"</u> is not clear or missing	<u>"How often"</u> is not clear or missing
<p>Would you like to listen to other plans and have us come back to you?</p> <p style="text-align: center;">[OR]</p> <p>Would you like to think about it some more? If you need help, you can catch us after class.</p>	<ul style="list-style-type: none"> • Is it an action, or the result of an action? For example, losing weight is not an action. • Is it something that can be measured? 	<ul style="list-style-type: none"> • This is amount of time, distance, volume, number of repetitions, etc. 	<ul style="list-style-type: none"> • This is which days of the week, times of the day • Commonly mixed up with "how often" 	<ul style="list-style-type: none"> • How many days this week? • This is a number, not days of the week
<p>↓</p> <p>Move on</p>	<p>Once clarified, ask them to repeat the plan, starting with "I will".</p>			

Remember – 3 "yes buts" and they're out!

Feedback Flow Chart

What was your Action Plan and how did it go?



Feedback Flow Chart (continued from previous page)

Conduct a brainstorm. Write suggestions on board or chartpad or just ask the participant to keep track, depending on time.

After the brainstorm,
ask original participant if any of the ideas will help

No

You'll have a chance to make an action plan every week. Think about what you would like to do next time.

If anyone thinks of any more ideas, catch _____ at break or after class.

Move on

Yes

Which did you find helpful?

We look forward to hearing about your action plan next time.

Move on

**** If someone is partially successful or not successful because of being sick or other reasons out of their control**

Sometimes life gets in the way. You need to take care of yourself.

Don't forget, though, that you can adjust or completely change your action plan at any time.

Remember – 3 “yes buts” and they’re out!

BRAINSTORM PROCEDURE

Preparation:

Write all brainstorm questions for the session on different flip chart pages before session begins. (Use exact wording of the brainstorm question from the manual.)

Process:

1. Facilitating leader reviews *Brainstorm Guidelines*
2. Brainstorm question is written on flip chart, exactly as it is in the manual. Ideally, this should be done ahead of time.
3. As ideas are given, facilitating leader repeats ideas to leader who is scribing in the participant's exact words.
4. If an idea is long or unclear, facilitating leader may ask participant to paraphrase it. If the participant is unable to do this, one of the leaders may paraphrase it and then ask the participant for permission to use the paraphrased version; if given approval, write it down.
5. If responses are slow in coming in, *WAIT*, then read over question once more. Leaders give ideas only when all ideas are exhausted from group.
6. Leaders should make no comments when ideas are flowing. If members start to make comments or ask questions about any of the ideas, facilitating leader explains that we are generating ideas right now and after brainstorm is complete we will discuss or clarify any of the ideas.
7. Facilitating leader then adds the ideas listed from script that were *not* suggested by group. These can be written down or not.
8. Facilitating leader reads the list of ideas and then asks the group if there are any questions or need for clarification.
9. If an idea is questioned or a clarification is requested, ask the participant who contributed the idea to give an explanation.

Problem Solving

Trouble Making an Action Plan, or Reporting Back on Action Plans

If Action Plan was:

Successful/Modified



If not successful, what were the barriers?

Does Participant have any ideas for how to solve those barriers?

If yes:

If no:



Has any one else ever had a similar problem? (By show of hands)

Would Participant like help from the group?

If No:

If Yes:



Problem Solve with the Group



Does Participant think any of the ideas would help solve the problem?