

**Take Control of Your Health Program**  
**WORKSHOP CHECKLIST SUMMARY OF OBSERVATIONS**

Date	Session Attended
Peer Leader	Observer
County	Number of Participants in Class
Skills	Comments/Suggestions
<p><b><u>Class Prep</u></b></p> <p>Arrived on time with materials/charts.</p> <p>Room appropriate re: protecting confidentiality, seating arranged in a “U” or circle, lighting, temperature, ADA, noise and distractions, ability of all trainees to see and hear, charts are legible handwriting, dark colored marking pens, charts displayed on easels or easily readable.</p>	
<p><b><u>Delivery of program</u></b></p> <p>Follows the curriculum as scripted in the Peer Leader Manual.</p> <p>Clearly explained topics and activities.</p> <p>Presentation style appropriate; articulate, eye contact, inflection.</p> <p>Modeled activities correctly.</p> <p>Positively reinforced participants.</p>	
<p><b><u>Group Interaction</u></b></p> <p>Encouraged group participation.</p> <p>Limited personal stories.</p> <p>Handled problem people effectively.</p> <p>Adhered to timelines.</p> <p>Worked well as a partner with co-leader.</p>	
<p><b><u>Brainstorming</u></b></p> <p>Encouraged to produce as many ideas as possible, if there are 15, tell the group you will take 2 more and end brainstorm.</p> <p>Repeated ideas.</p> <p>Reminded group not to comment on ideas.</p> <p>Did not allow discussion/questions.</p> <p>Used silence.</p> <p>Person writing not leading activity.</p> <p>Offered own response only at end.</p> <p>Reviewed the list by reading ideas.</p> <p>Add other ideas from manual only when NOT previously mentioned.</p> <p>Provided opportunity for clarification.</p>	

## SUMMARY OF OBSERVATIONS

(Continued)

Skills	Comments/Suggestions
<p><b><u>Action Planning</u></b></p> <p>Leaders model action plans correctly using different plans.</p> <p>Used chart to point out steps as trainees shared their action plans.</p> <p>Pointed out “will” if participant used try, should, want or think.</p> <p>Helped identify barriers if confidence level is less than 7.</p> <p>Asked the group for suggestions before the leaders offered responses.</p>	
<p><b><u>Feedback/Problem Solving</u></b></p> <p>Asked person to state their action plan and success/problems.</p> <p>Complimented appropriate action plan adjustment/modification.</p> <p>If problems, what barriers existed and did they try a solution?</p> <p>Asked person if they would like help.</p> <p>Conducted brainstorm appropriately.</p> <p>Limited to 3 ‘yes but’.</p> <p>Offered the person to choose one idea.</p> <p>Recommended that person make a note of suggestions offered.</p>	
<p><b><u>Fidelity</u></b></p> <p>Delivered all content materials according to the current Stanford leaders’ manual.</p> <p>Accurately paraphrased sections of activities (provided info clearly, without adding or deleting material that changed the content).</p> <p>Distributed and collected appropriate data collection forms.</p>	
<p>Additional Comments:</p>    	
<p>Signature of Peer Leader</p>	<p>Signature of Observer</p>

## Session 1 Fidelity Checklist

Item	Comments
<input type="checkbox"/> Agenda and Charts 2, 3, 4 and 5 <input type="checkbox"/> Name tags available. <input type="checkbox"/> Sign in sheet distributed / Attendance log available. <input type="checkbox"/> Read Welcome and Confidentiality Statement. <input type="checkbox"/> Participant Information Survey distributed.	
<b>Activity #1 – Introduction to the Workshop</b>	
<input type="checkbox"/> Reviewed acute vs. chronic conditions accurately. <input type="checkbox"/> Reviewed Charts 1 (Self-Management Tasks) and 2 (Toolbox) accurately. <input type="checkbox"/> Distributed hand-out, explained workshop topics and homework. <input type="checkbox"/> Reviewed Chart 3 (Guidelines) accurately.	
<b>Activity #2 – Group Introductions</b>	
<input type="checkbox"/> Modeled introductions, 2-3 problems caused by chronic conditions. <input type="checkbox"/> Leader not leading the activity is writing responses <input type="checkbox"/> Pointed out concerns are the same. <input type="checkbox"/> Related concerns to the tools in the Tool Box.	
<b>Activity #3 – The Mind-Body Connection/Distractio</b>	
<input type="checkbox"/> Accurately delivered content. <input type="checkbox"/> Guided through lemon activity slowly. <input type="checkbox"/> Noted distraction not to be used with chest pain. <input type="checkbox"/> Clearly discussed Chart 4 (Brainstorm Guidelines). <input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet). <input type="checkbox"/> Noted difference between mind and activity distrations. <input type="checkbox"/> Timed distraction techniques correctly.	
<b>Activity #4 – Getting a Good Night’s Sleep</b>	
<input type="checkbox"/> Accurately presented content. <input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet).	
<b>Activity #5 - Introduction to Action Plans</b>	
<input type="checkbox"/> Presented info in Chart 5; posted on wall. <input type="checkbox"/> Modeled action plan, leaders have different plans. <input type="checkbox"/> Broke people into pairs; family members not paired with each other. Used a timekeeper. <input type="checkbox"/> Asked for volunteer to report on action plan. <input type="checkbox"/> Summarized each action plan by using the standard. <input type="checkbox"/> Something YOU WANT to do: <ul style="list-style-type: none"> <li>• Achievable.</li> <li>• Action specific.</li> <li>• Answers what, how much, when, how often, confidence level of 7 or more.</li> </ul> <input type="checkbox"/> For confidence levels less than 7, guided through identification of barriers. <input type="checkbox"/> Informed participants leaders will be calling them to support them in their plans.	
<b>Activity #6 – Closing</b>	
<input type="checkbox"/> Reviewed 7 items. <input type="checkbox"/> Followed activity timelines; class ended within 2-1/2 hours.	

## Session 2 Fidelity Checklist

Item	Comments
<input type="checkbox"/> Agenda and Charts 2, 3, 4, 5 and 6 posted. <input type="checkbox"/> Charts are legible handwriting, dark colored marking pens, easily readable, name tags available.	
<b>Activity #1 - Feedback/Problem Solving</b>	
<input type="checkbox"/> Modeled action plan; stated action plan and level of success; asked for volunteer. <input type="checkbox"/> Complimented appropriate action plan adjustment/modification. <input type="checkbox"/> If action plan is not achieved: <ul style="list-style-type: none"> <li>• asked participant about barriers and if they tried a solution</li> <li>• asked if help is wanted from the group, if yes:</li> </ul> <input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet). <input type="checkbox"/> Limited to 3 'yes but', offered the person to choose one idea. <input type="checkbox"/> Recommended person make a note of suggestions offered. <input type="checkbox"/> Modeled problem-solving steps appropriately; reviewed Chart 6.	
<b>Activity #2 - Dealing with Difficult Emotions</b>	
<input type="checkbox"/> Utilized Chart 7 (Symptom Cycle) to illustrate difficult emotions. <input type="checkbox"/> Accurately delivered instructions for group activity: <ul style="list-style-type: none"> <li>• Model the cause of your difficult emotion</li> <li>• Family members not paired, caregivers with caregivers</li> <li>• Reporting for your partner.</li> <li>• Info does not have to be shared.</li> <li>• Checked that the report was accurate.</li> </ul> <input type="checkbox"/> Co-leader writes cause of emotions, starting with self. <input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet). <input type="checkbox"/> Asked participants to volunteer any new things they are going to use to deal with these emotions in the future. <input type="checkbox"/> Specified writing or journaling for dealing with difficult emotions. <input type="checkbox"/> Leaders model and lead group in reporting one thing for which they are grateful or has made the happy today.	
<b>Activity #3 - Introduction to Physical Activity and Exercise</b>	
<input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet). <input type="checkbox"/> Utilized Chart 8, paraphrased section appropriately. <input type="checkbox"/> Refer participants to exercises in their book. <input type="checkbox"/> Asked participants to identify physical activity goal and barrier. <input type="checkbox"/> Problem solved 2-3 participants. <input type="checkbox"/> Encouraged choosing a goal around physical activity.	
<b>Activity #4 – Preventing Falls and Improving Balance</b>	
<input type="checkbox"/> Deliver content accurately. <input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet). <input type="checkbox"/> Utilized Chart 9, paraphrased section appropriately.	
<b>Activity #4 - Making an Action Plan</b>	
<input type="checkbox"/> Clearly utilized Chart 5-reminded participants that the plan should be something they want to do and be realistic. <input type="checkbox"/> Conducted action plan appropriately (see summary sheet).	
<b>Activity #5 – Closing</b>	
<input type="checkbox"/> Reviewed all items; asked members to choose a buddy to call. <input type="checkbox"/> Followed activity timelines, class ended within 2-1/2 hours.	

## Session 3 Fidelity Checklist

Item	Comments
<ul style="list-style-type: none"> <li>___ Agenda and charts 2, 3, 4, 5, 6 and 7 posted.</li> <li>___ Charts are legible handwriting, dark colored marking pens, easily readable, name tags available.</li> </ul>	
<b>Activity #1 - Feedback/Problem Solving</b>	
<ul style="list-style-type: none"> <li>___ Modeled action plan; stated action plan and level of success; asked for volunteer.</li> <li>___ Complimented appropriate action plan adjustment/modification.</li> <li>___ If action plan is not achieved:               <ul style="list-style-type: none"> <li>• asked participant about barriers and if they tried a solution</li> <li>• asked if help is wanted from the group, if yes:</li> </ul> </li> <li>___ Conducted brainstorm appropriately (see summary sheet).</li> <li>___ Limited to 3 'yes but', offered the person to choose one idea.</li> <li>___ Recommended person make a note of suggestions offered.</li> <li>___ Modeled problem-solving steps appropriately; reviewed Chart 6.</li> </ul>	
<b>Activity #2 – Making Decisions</b>	
<ul style="list-style-type: none"> <li>___ Accurately delivered content of Charts 10 and 11, paraphrased section appropriately.</li> <li>___ Break into pairs, remind group they do not have to share.</li> <li>___ Accurately deliver instructions, time no more than 10 minutes.</li> <li>___ Ask 2 or 3 people to share the decision they were trying to make, what they decided, and if that is what their gut told them, redirect to answer the 3 questions only.</li> </ul>	
<b>Activity #3 - Pain and Fatigue Management</b>	
<ul style="list-style-type: none"> <li>___ Clearly delivered activity content, appropriately brainstormed using different color markers to represent pain and fatigue.</li> <li>___ Deliver content accurately.</li> </ul>	
<b>Activity #4 - Endurance Exercise</b>	
<ul style="list-style-type: none"> <li>___ Clearly delivered content, using Charts 7, 12, 13, and 14.</li> <li>___ During endurance monitoring, one leader marched in place and the other led the orchestra.</li> <li>___ Clearly explained establishing baseline with time and/or distance examples.</li> <li>___ Suggested to participants to choose one of the methods for monitoring exertion and during the week check your exertion level during different activities and exercises.</li> </ul>	
<b>Activity #5 – Body Scan</b>	
<ul style="list-style-type: none"> <li>___ Informed participants their participation in optional, created environment conducive to relaxation exercise.</li> <li>___ Informed participants the script is in the book or they can order the CD.</li> </ul>	
<b>Activity #6 - Making an Action Plan</b>	
<ul style="list-style-type: none"> <li>___ Accurately utilized Chart 5-reminded participants that the plan should be something they want to do and be realistic.</li> <li>___ Conducted action plan appropriately (see summary sheet).</li> </ul>	
<b>Activity #7 – Closing</b>	
<ul style="list-style-type: none"> <li>___ Reviewed 7 items, note homework or physical activities and food diary.</li> <li>___ Followed activity timelines, class ended within 2-1/2 hours.</li> </ul>	

## Session 4 Fidelity Checklist

Item	Comments
<p>___ Agenda and charts 2, 3, 5, 6, and 7 posted.</p> <p>___ Charts are legible handwriting, dark colored marking pens, easily readable, name tags available.</p>	
<b>Activity #1 - Feedback/Problem Solving</b>	
<p>___ Modeled action plan; stated action plan and level of success; asked for volunteer.</p> <p>___ Complimented appropriate action plan adjustment/modification.</p> <p>___ If action plan is not achieved:</p> <ul style="list-style-type: none"> <li>• asked participant about barriers and if they tried a solution</li> <li>• asked if help is wanted from the group, if yes:</li> </ul> <p>___ Conducted brainstorm appropriately (see summary sheet).</p> <p>___ Limited to 3 'yes but', offered the person to choose one idea.</p> <p>___ Recommended person make a note of suggestions offered.</p> <p>___ Modeled problem-solving steps appropriately; reviewed Chart 6.</p>	
<b>Activity #2 – Better Breathing</b>	
<p>___ Accurately delivered material and review of Chart 15.</p> <p>___ Conducted brainstorm appropriately (see summary sheet).</p> <p>___ Correctly demonstrated pursed lip and diaphragmatic breathing technique.</p>	
<b>Activity #3 - Healthy Eating</b>	
<p>___ Clearly presented information and Charts 16 and 17.</p> <p>___ Described healthy eating not as dieting, but making small changes.</p> <p>___ Clearly explained place method.</p> <p>___ Presented info on portion size accurately, group involved by using book to identify portion sizes.</p>	
<b>Activity #4 - Communication Skills</b>	
<p>___ Delivered content according to manual, clearly explained "I" messages and Chart 18, paraphrase section appropriately.</p>	
<b>Activity #5 - Problem Solving</b>	
<p>___ Reviewed Chart 6.</p> <p>___ Instruction for group activity clear, pair up according to manual.</p> <p>___ Kept reports concise, statement of problem clear, one or two solutions, one solution chosen.</p> <p>___ Checked with partner for correctness.</p> <p>___ Ask if anyone heard new solutions they may add to their own list.</p> <p>___ Ask how it felt to help another.</p>	
<b>Activity #7 - Making an Action Plan</b>	
<p>___ Accurately utilized Chart 7-reminded participants that the plan should be something they want to do and be realistic.</p> <p>___ Conducted action plan appropriately (see summary sheet).</p>	
<b>Activity #8 - Closing</b>	
<p>___ Reviewed 6 items, remind to bring in books and food labels.</p> <p>___ Followed activity timelines, class ended within 2 ½ hours.</p>	

## Session 5 Fidelity Checklist

Item	Comments
<input type="checkbox"/> Agenda and Charts 2, 3, 5, 6, and 7 posted. <input type="checkbox"/> Charts are legible handwriting, dark colored marking pens, easily readable, name tags available.	
<b>Activity #1 - Feedback/Problem Solving</b>	
<input type="checkbox"/> Modeled action plan; stated action plan and level of success; asked for volunteer. <input type="checkbox"/> Complimented appropriate action plan adjustment/modification. <input type="checkbox"/> If action plan is not achieved: <ul style="list-style-type: none"> <li>• asked participant about barriers and if they tried a solution</li> <li>• asked if help is wanted from the group, if yes:</li> </ul> <input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet). <input type="checkbox"/> Limited to 3 'yes but', offered the person to choose one idea. <input type="checkbox"/> Recommended person make a note of suggestions offered. <input type="checkbox"/> Modeled problem-solving steps appropriately; reviewed Chart 6.	
<b>Activity #2 – Making Healthy Food Choices</b>	
<input type="checkbox"/> Accurately deliver content of Chart 19, ask group questions. <input type="checkbox"/> Referred participants to book to look at food labels. <input type="checkbox"/> Asked participants to read their food labels from home, provided labels for those who did not bring them.	
<b>Activity #3 –Medication Usage</b>	
<input type="checkbox"/> Clearly delivered content, used Charts 20, 21, and 22, paraphrase section appropriately. <input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet). <input type="checkbox"/> Chose one or two problems to brainstorm. <input type="checkbox"/> Brainstorm “forgetting to take medications”. <input type="checkbox"/> Suggest personal medication list.	
<b>Activity #4 - Making Informed Treatment Decisions</b>	
<input type="checkbox"/> Clearly delivered content, used Chart 23, paraphrased correctly.	
<b>Activity #5 - Depression Management</b>	
<input type="checkbox"/> Utilized Chart 7 appropriately. <input type="checkbox"/> Conducted brainstorms appropriately (see summary sheet). <input type="checkbox"/> Reminded participants that alcohol and some drugs can make depression worse. <input type="checkbox"/> Noted need for professional treatment for severe depression.	
<b>Activity #6 - Positive Thinking</b>	
<input type="checkbox"/> Accurately delivered content using Chart 24. <input type="checkbox"/> Allowed time for participants to suggest examples of changing negative thoughts to positive.	
<b>Activity #7 - Making an Action Plan</b>	
<input type="checkbox"/> Accurately utilized Chart 5-reminded participants that the plan should be something they want to do and be realistic. <input type="checkbox"/> Conducted action plan appropriately (see summary sheet).	
<b>Activity #8 – Closing</b>	
<input type="checkbox"/> Reviewed 7 items, including food diary, letters to doctors and practice positive thinking. <input type="checkbox"/> Followed activity timelines, class ended within 2-1/2 hours.	

## Session 6 Fidelity Checklist

Item	Comments
<input type="checkbox"/> Agenda and Charts 2, 3, 5, 6, and 7 posted <input type="checkbox"/> Charts are legible handwriting, dark colored marking pens, easily readable, name tags, available.	
<b>Activity #1 - Feedback/Problem Solving</b>	
<input type="checkbox"/> Modeled action plan; stated action plan and level of success; asked for volunteer. <input type="checkbox"/> Complimented appropriate action plan adjustment/modification. <input type="checkbox"/> If action plan is not achieved: <ul style="list-style-type: none"> <li>• asked participant about barriers and if they tried a solution</li> <li>• asked if help is wanted from the group, if yes:</li> </ul> <input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet). <input type="checkbox"/> Limited to 3 'yes but', offered the person to choose one idea. <input type="checkbox"/> Recommended person make a note of suggestions offered. <input type="checkbox"/> Modeled problem-solving steps appropriately; reviewed Chart 6.	
<b>Activity #2 - Working with Your Health Care Professional and Health Care System</b>	
<input type="checkbox"/> Clearly defined health care system compared to health care provider. <input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet). <input type="checkbox"/> Reviewed Chart 25 accurately, paraphrased appropriately.	
<b>Activity #3 – Weight Management</b>	
<input type="checkbox"/> Asked participants to share what they have learned from food diary. <input type="checkbox"/> Reviewed Chart 26 accurately, paraphrased appropriately.	
<b>Activity #3 - Looking Back and Planning for the Future</b>	
<input type="checkbox"/> Conducted brainstorm appropriately (see summary sheet). <input type="checkbox"/> Reviewed Chart 2. <input type="checkbox"/> Clearly modeled 3 to 6-month goals and steps to reach the goal. <input type="checkbox"/> Problem solved if appropriate. <input type="checkbox"/> Participants shared accomplishments, pointed out helped each other. <input type="checkbox"/> Led participants in visualization. <input type="checkbox"/> Certificates prepared and distributed. <input type="checkbox"/> Distributed and collected Workshop Evaluation Form.	
<b>Activity #4 – Closing</b>	
<input type="checkbox"/> Reviewed 5 items. <input type="checkbox"/> Peer Leaders complete Workshop Information Cover Sheet. <input type="checkbox"/> Peer Leaders complete PL Feedback Form. <input type="checkbox"/> Followed activity timelines, class ended within 2-1/2 hours.	