PATH Leader Toolkit



The purpose of this Personal Action Toward Health leader toolkit is to help you better understand each aspect of providing the PATH programs in our communities. We hope that this toolkit helps you be a better leader for these great programs!



Statewide PATH Program Website: www.mihealthyprograms.org

Self-Management Resource Center www.selfmanagementresource.com

Revised -December 2017

Developed by the Michigan PATH Fidelity Workgroup $\ensuremath{\mathbb{C}}$ 2017



Who is Your Licensed Organization?



The **Self-Management Resource Center**, formerly Stanford Patient Education Research Center, created this program and only allows those trained under a licensed organization to conduct the program.

An organization such as the Area Agency on Aging can **purchase a license** in order to train and provide workshops within their community.





Ļ

Once the organization has a license, Master Trainers can train leaders to facilitate workshops within the community. Having a license makes that organization responsible for their leaders and upholding the **fidelity of the program**.

The organization you were trained with may not be the organization you lead workshops under, so make sure you know who's your **PATH Program license holder**. You should have a **copy of the license** in your leader manual(s). If not, check with your organization.



Please write your licensed organization here:



Certification & Training

As a leader, you are responsible for tracking your certification and the workshops you have led. Below is a brief guide about staying certified. For additional resources on keeping track of your certification visit: www.mihealthyprogams.org.

Guidelines for obtaining leader certification

Leader Training: Successfully complete a 4-day leader training (24 hours total). 2 day cross-training may apply if you are a current PATH leader. **First Workshop:** Facilitate a 6 week workshop within 12 months from the last day of training

Guidelines for retaining leader certification

Remaining certified: Facilitate and complete one 6-week workshop every year by the anniversary date of the last training date listed below. This guideline applies to each program the leader is certified. Leaders may attend a refresher course, only once every two years, to keep up skills set.

When were you trained?

PATH	Diabetes PATH		
Dates:	Dates:		
Location:	Location:		
Chronic Pain PATH	Cancer PATH		
Dates:	Dates:		
Location:	Location:		
Tomando Control De Su Salud	Building Better Caregiver's		
Dates:	Dates:		
Location:	Location:		

Organization Contact Page

In addition to your licensed organization, you may have a different contact or organization that you conduct workshops under. Hopefully this will help you keep track of their contact information and any additional information you may need to write down about the organization you conduct PATH under.

Organization Name:		
Contact Name:	Contact Name:	
Office Number:	Office Number:	
Cell Number:	Cell Number:	
Email:	Email:	
Notes:		

Organization Name:		
Contact Name:	Contact Name:	
Office Number:	Office Number:	
Cell Number:	Cell Number:	
Email:	Email:	
Notes:		

Organization Name:		
Contact Name:	Contact Name:	
Office Number:	Office Number:	
Cell Number:	Cell Number:	
Email:	Email:	
Notes:		



What is Fidelity and why Bother?



Each one of the PATH Progams has been tested and shown to be very effective at helping people better manage their health. This is what makes it an **evidence-based program**.

Fidelity is an important aspect of providing evidence-based programs and means **staying true to the design** of the program. If the structure or content of the program is changed, there can be a real problem because not everyone will be offering the same program.





This is important because the program as designed has been proven to help people (that is, it is evidence based). It should be **delivered the same way in every region** in the state (actually every part of the country and around the world). Changes in program delivery (low fidelity) can produce unintended negative effects and/or reduce the beneficial aspects and positive outcomes of the program.

This goes for all of the programs that were studied through Stanford which are listed below:

Original Name

Chronic Disease Self-Management Program

Diabetes Self-Management Program

Chronic Pain Self-Management Program

Cancer Thriving & Surviving

Tomando Control De Su Salud

Building Better Caregivers

Michigan's Name

Personal Action Toward Health (PATH)

Diabetes PATH

Chronic Pain PATH

Cancer PATH

Tomando Control De Su Salud

Caregiver PATH



How will leaders be supported in maintaining fidelity?

To maintain the excellence of the PATH programs provided in Michigan and support leaders in improving their skills, the following practices have been put into place:

- Every effort is made to pair new leaders with experienced leaders. This will help leaders continue their learning process beyond the 4-day PATH leader training.
- A PATH coordinator may call leaders after the first session to discuss any problems with the site or the other leaders.
- Experienced leaders are encouraged to provide constructive feedback to a new co-leader at the end of each session after the participants have left. (*How do I give constructive feedback, p.12*)
- All leaders (new or experienced) should help one another during the workshop if one observes an omission or an error.
- Leaders should report any concerns they may have about a leader to the PATH coordinator, if a problem does not resolve after feedback has been given.
- A Master Trainer or experienced leader may come to observe the workshop leaders during one of the 6 sessions and provide feedback back using a fidelity checklist. The goal is to help you advance your ability as a program leader, not to "catch you" doing something wrong.

The following are included in a fidelity check

Are the leaders prepared to start on time by having all the materials needed for that session, set-up and ready to go?

- Action Plan: Feedback and Problem Solving
 - Did the leader report their action plan in a brief way?
 - Did the leaders praise participants for achieving their action plan or for modifying their action plan?
 - If they did not complete their action plan, did the leader problem solve with the participant?
- Does the leader accurately deliver the information in the paraphrase section of different activities in an easy and clear way?
- Does the leader accurately deliver instructions for group activities according to the leaders' manual guidelines?
- Are the leaders modeling each activity accurately?
- **Brainstorming**:
 - How well did the leaders follow the brainstorming guidelines? (i.e. written in participants words, leaders did not comment about participants ideas, leaders keep the group focused on the topic).



What's a good workshop location?



Priorities:

- A comfortable and adequately sized meeting space that is accessible to people with various levels of mobility.
- The space should have table and chairs that can be configured in a U-shape.
- The meeting space should not be in an open area where non-participants can hear discussion.
- The meeting space should have adequate air conditioning in the summer, heat in the winter.
- Have an accessible restroom.
- Air conditioning if in the summer.
- Site is able to assist with recruitment.

Extras:

- A point person who is willing to assist in recruitment and registrationDirections provided by the site.
- Open to non-residents if workshop is held at a residence.
- Registration will happen through the site.

Things to Ask:

- Will the site provide snacks or beverages?
- Will the site assist in recruiting participants?



- Will the site register participants for the class?
- What are the most convienent times for the site to host a workshop?
- Do they have a white board in the room that we will have the class?
- Can we have the workshop in the space for free?
- Do they have groups that are ongoing that they/we can recruit at?

How does a workshop get scheduled?



A site may reach out to a PATH provider to **host a workshop** or organizations may reach out to the site.



Visit the site in order to see if they have private space and the ability to recruit for a workshop at their site.



Schedule the workshop based on when they can get the highest level of participation. (ex. not conflicting with other scheduled activities)



The site representative signs a **letter of agreement** which outlines support by both the organization and the site and what each party can contribute.



Once a workshop is scheduled it is then **registered with the Michigan Department Health and Human Services (MDHHS) and a flyer** is made with the following information:

Name and Location Address Start Date & Time Contact Name & Phone Number [& registration info if different]



Find leaders or confirm with already selected leaders for the site.

If you know of a location that would be a good workshop site or if you know of a site that is interested in holding a workshop, contact your licensed organization to make sure the location meets funding and organizational priorities.

How do we recruit participants?

Basic Workshop Recruitment Guidelines

Ideal group size is 12-15 participants. Maximum group size should be no more than 15-18 participants. Family, friends, and caregivers are encouraged to attend the program as participants.

If, at any time, a workshop has less than 6 participants for two consecutive weeks, the licensing organization or the coordinator reserves the right to cancel the workshop.

Tools to Use for Recruitment

Your license organization may have tools they want you to use or you can find them on the PATH Partner Website: www.mihealthyprograms.org





Flyers & Brochures

Press Release



Video



including letters to physicians

Best Practices

- Provide a "Session Zero" to a group of potential participants.
- Give presentations in places where older adults are served and congregate (e.g. senior centers, meal sites, churches, service clubs, and professional retiree groups).
- Have the site lead and implement recruitment efforts through their own newsletter or other proven methods of communication.
- Contact current or past participants and ask them to invite others they know to sign up.
- Meet with support groups (e.g. cancer, arthritis, diabetes) in hospitals and throughout the community. Serve as a guest speaker at one of their meetings to explain the workshop.
- Contact physicians and request that they refer their patients.
- Speak with people in other health education classes, including classes sponsored by other organizations (e.g. Red Cross, YMCA, community recreation centers, health care providers).
- Submit a personal interest story to a local paper. Highlight an individual's experience with their chronic condition and the impact PATH had on their life.
- Obtain names and phone numbers on a registration list to allow for follow up.

Session Zero

Introduction:

This program was developed and tested at Stanford University's School of Medicine. It is implemented throughout the world and all over Michigan. [_ Insert Organization _] is one of the organizations that provides and believes in the effectiveness of the PATH program(s).

Description:

- This is a six-week workshop that has been proven to improve the health status and build the skills needed to manage ongoing health conditions on a daily basis.
- Workshops are free/low cost and open to the community.
- The program is led by trained leaders; one or both with a chronic condition.

Tools Learned in a Workshop:

During the workshop you will learn the tools you need to manage the common problems those with ongoing health conditions deal with. Just like sometimes you need to use a hammer instead of a wrench, you will learn a variety of tools, such as better breathing, relaxation exercises, and action planning, decision making/problem solving, and when to use them. By the end of the workshop you will have an entire **"toolbox" full of tools** you can use to manage your chronic condition.

What will you gain from PATH?

- The confidence to manage everyday activities by making an action plan
- New ways to manage your symptoms and decrease stress
- * Also offered in Spanish called Tomando Control De Su Salud

What will you gain from Diabetes PATH?

- New ways to balance your blood sugar and a better understanding of the importance of monitoring
- A better understanding of how you can avoid complications

What will you gain from Chronic Pain?

- Knowing the difference between myths and facts when dealing with your pain
- New techniques to help you deal with frustration, fatigue, isolation, and poor sleep
- The appropriate use of your medication

What will you gain from Cancer PATH?

- New skills to help you face uncertainty about the future
- A better understanding about how cancer effects your body and how you can work to regain fitness

Does It Work?

Yes! Each PATH program has been extensively studied in randomized, controlled trials with follow-up for several years. The results show **significant improvements** in: health status, physical activity, communication with physicians and self-management behavior. **Significant reductions** in doctor's visits, fatigue, shortness of breath, pain, depression, and health distress were also found. [Share a breif past participant testimonial or your own experience with the program]

Final Remarks:

We really believe in this program and have seen the good it can do for adults in Michigan who have to cope with ongoing health conditions on a daily basis. We are very excited to offer this to your community and hope you will sign up for the workshop and **see what it can do for you!**

Meet your co-leader

Everyone has a different style of leading so it's good to find out some information about your co-leader beforehand. This should help you get to know them before the start of the workshop.

What to Ask:

- Is this your first workshop?
- Å
- When was the last time you led?
- What sections do you want to lead? (some people split Odd & Evens. If it's a particularly long section you may want to split it differently.
 Regardless, each leader should know all the material)
- Do you prefer to sit or stand for most of the workshop?
- How comfortable do you feel scribing for brainstorms?
- If the site cannot hold the materials, how would you like to split that responsibility?
- Would you like to be our program coordinator's primary contact if anything arises or would you like me to be?

Key Points About Brainstorming

Brainstorm question is written using **KEY** words or if you're really rushing, it does not have to be written.

No more than 15 ideas. Do not number them. The scribe counts them in their head and tells the facilitator they only need two more.

If there are fewer than 15 ideas then ...W...A..I...T... for 15 seconds before ending the brainstorm. **Facilitator** repeats the ideas loudly, using the participant's own **KEY** words. **Not the scribe.**

The **scribe** listens only to the co-leader. They are in charge of telling the facilitator if they can't keep up.

Facilitator's job is to engage the group and to keep eye contact with the group.

The **Scribe's** job is to write down the ideas they hear from the facilitator and tell the facilitator to slow down or that they are almost done.

For the full list of Brainstorming Guidelines, look in your manual after the first brainstorm, which is during Session 1 of any PATH program.

How do I give constructive feedback?

What is it?

- Constructive feedback is letting people know in a **helpful way** how they are doing.
- It can let someone know what they are **doing well** and what they could or **need to improve.**
- It is delivered in a kind and friendly way so it's easy for the person to listen to.



Materials

When it comes to materials, each organization handles them differently, but below is the overall list with suggested snacks if snacks are provided.

All Sessions

- Charts (check availability at office, you may need to make a set)
- Blank name tag tent cards for everyone (collect every week)
- Easel stand (if needed)
- Blank flip chart (please return at end of workshop)
- 2 Sharpies/markers (please return at end of workshop)
- Dry Erase Markers
- Extra pens and paper
- Scotch/Masking Tape to hang charts
- Books—Living a Healthy Life with Chronic Conditions (15-20)
- Handouts Workshop Overview; Diabetes PATH only Menu Planning #1 & #2
- Optional:
- Mind Body Relaxation CD
- Resource table handouts
- Tissues

Snacks



Fresh Fruit

We are modeling healthy snacking and trying to make it easier for our participants to make good choices. Snacks should be 25g of Carbohydrates or less and 5g of fat or less per serving based on the label.





Trail Mix Hummus with Pita or veggies



Grains

Granola Bars (ex. Kashi, Kind, Nature Valley, & Fiber One) Baked tortilla chips & Salsa Pretzels or Popcorn Whole grain crackers & cheese Mini bagels with low fat cream cheese



Dairy

Low fat yogurt with granola Low-fat string cheese

Emergency Preparedness

Sometimes things can come up before or during a workshop so it's good to know what questions to ask in order to prepare yourself.

Inclement Weather

Rule of thumb:

If the public schools are closed in the city where the workshop is being held, then cancel the session.

Process for canceling:

- Call coordinator or organization your working with to lead this particular workshop
- Call your co-leader
- Call the site Double check if the site is closed
 - *Exception:* If the site is an apartment building and most of the participants live there, please be safe and use your own discretion for canceling.
- Call the participants Split the list with your co-leader

Emergency Safety

Fire and Natural Disasters



Ask the site where the exits are located and what their emergency plan is so you can direct the participants to the appropriate safety areas.

Medical Emergency



Ask the front desk or site coordinator what their protocol is for medical emergencies prior to the workshop.

Things to consider:

- Who should you connect to on site if a medical emergency happens?
- Where is their AED (Automated Electronic Defibrillator)?
- Where is their First Aid Kit?
- If you notice that a participant is behaving in a way that causes you concern, one of the leaders should check on that person.
- Do you have cellphone reception in the workshop room?

If the person cannot breathe or is unconscious CALL 911 IMMEDIATELY!

Emergency Preparedness Continued

How to deal with different types of people

There are a variety of different behaviors that you may have to deal with. Every PATH program you are trained in has a section in the back of your manual under the Appendices that gives suggestions on how to handle different types of people. Examples are below:



Crisis Situations

In the event that a participant talks about harming themselves or you believe they are in immediate danger it may be necessary to call 911. In addition contact your coordinator or the organization that you are working with for the specific workshop you are leading. The following are other resources to provide to the participant:

If a participant mentions If a participant mentions suicide or harming themselves: abuse or neglect: You may provide them with the You may provide them with **National Suicide Prevention Lifeline** Adult Protective Services information: information: SPEAKUP! R ANY TIME 1-800-273-TALK (8255) **REPORT ABUSE & NEGLECT** suicidepreventionlifeline.org 855-444-3911

Beginning the Workshop

REMEMBER:

Ideal group size is 12-15 participants. Maximum group size should be no more than 15-18 participants. Family, friends, and caregivers are encouraged to attend the program as participants.

If at any time, a workshop has less than 6 participants for 2 consecutive weeks, the workshop could be canceled.

Pre-Workshop

- Call each person on your registration list a day or two before your first session to remind them of this workshop and briefly introduce yourself. Ask them to invite others. This personal touch makes a difference.
- Make sure you have all your materials.
- Arrive 30 to 45 minutes prior to the start time for set up. The first day is especially busy with paperwork and getting to know your participants.

How to Introduce the Paperwork

PARAPHRASE: "The paperwork that you recieved to be filled out is optional, but the data you provide really helps the state and organizations provide these workshops for low cost/free in the communities. During the rest of the workshop, the only time we fill out paperwork is the final session. If you haven't finished the paperwork by the time we start, you may complete it during the break." (The Welcome Letter should be read/paraphrased also)

Session 1

- Workshop Overview (given to participants)
- Welcome Letter (Read during session 1 to explain the PIFs)
- Participant Information Forms (PIF)
- Attendance Log (Return within a week after Session 6)
- Diabetes PATH Only Give these to those participants with diabetes the Diabetes Pre-Survey at Session 1. Return within a week)
- Remember: It is essential to number the Participant Information Forms (PIF) and Evaluation Forms with the same number next to their name on the attendance roster. There are different ways to do this so make sure you and your co-leader have worked out how you're going to do this.

Why Paperwork is Important

The paperwork handed out to participants during session 1 and session 6 is really important but is optional for the participant to fill out. MDHHS and organizations that provide PATH programing use this data to continue to recieve funding and support to provide the PATH program for free or low cost.

Note: Your licensed organization may have provided the paperwork and materials for you. All paperwork can also be found on the PATH Partner Website: www.mihealthyprograms.org

Making sure the Participant ID is on the Paperwork

Below are a few suggestions about how you can make sure the participant ID is on the paperwork when you turn it in:

- For Diabetes PATH; staple the Session 1 paperwork together and Session 6 paperwork together so if you miss ID's you can go back and fill them in.
- Fill out attendance sheet based on who registered. When the person checks in, write their ID number on their PIF.
- Fill out the number on the paperwork and have them write their name on the attendance.
- Have one leader in charge of paperwork and the other in charge of greeting making sure things are setup to start.
- Before workshop write number on top front of paperwork



Ending the Workshop

Session 5

Provider Feedback letter: Passed out during Session 5 and collected during Session 6.
This helps get the word out to providers so try to encourage participants to do this.

Session 6

- Participants should complete the workshop evaluation form.
- Diabetes PATH participants who completed the Diabetes Pre-Survey should be given the Diabetes Post-Survey in session 6.
- Hand out certificates of completion.
- Provide Flyers for other PATH program workshops in their area to share with physicians, friends, and family.

Testimonials

Hearing what people learn from being part of the workshop is one of the most rewarding experiences as a leader. The testimonials also help organizations show funders or supporters of the PATH program how effective the program is in the community. Below are different ways to get testimonials:



After Workshop Details

There are just a few logistical items to take care of once the workshop is done:

- Give the Licensed Organization or Program Coordinator the following paperwork within a week:
 - Workshop attendance and evaluation forms
 - Diabetes PATH Only: Diabetes Post Survey
 - Testimonials
 - Provider Feedback Letter

Once all the paperwork is recieved, it is sent to MDHHS where they collect the data.

Bonus Session

At the conclusion of the six week workshop, participants may want to continue to meet. This can be a great opportunity to provide additional health information that is outside of the typical PATH program workshop. It can be helpful to ask participants what they would be interested in learning more about, some suggestions are below.



Please note: This is not a time for anyone to pitch their product. Please ensure this session is educational in nature and not a sales pitch.

Leader Contact Sheet

When you co-lead with someone, you may want to keep their contact information, especially if you enjoyed working with them and want to partner with them again. Here's where you can keep track of other leaders.

Name:	Phone Number:
PATH Program:	Email:
Name:	Phone Number:
PATH Program:	Email:
Name:	Phone Number:
PATH Program:	Email:
	Linun.
Name:	Phone Number:
PATH Program:	Email:
Name:	Phone Number:
Name: PATH Program:	Phone Number: Email:
PATH Program:	Email:
PATH Program: Name:	Email: Phone Number:
PATH Program: Name: PATH Program:	Email: Phone Number: Email:
PATH Program: Name: PATH Program: Name:	Email: Phone Number: Email: Phone Number:



Workshop Tracker

Once you are done with your workshop, it's a good idea to keep track of workshops. Use the next two pages to track the workshops you have led. **Remember**, you need to lead one workshop each year prior to the last date of your original training date (*See certification on page 4 for questions*).

What kind of PATH Program?	Location	Date Ended	License Organization



Workshop Tracker continued

What kind of PATH Program?	Location	Date Ended	License Organization

Leader Awesomeness

All the workshop data and materials are turned in since the workshop is finished, so now what? This may be a good time to reflect on how you did as a leader. You can ask your co-leader for constructive feedback and/or you can ask yourself how you did.

Ask Yourself: • ⊦

• How do I feel I did?

- How did the participants respond to my interactions?
- Is there any constructive feedback I should give to my leader or the program coordinator/license agency?
- What could I do better for next time?
- Have I led every activity or have I led the same activities every time?
- Was there any feedback from participants that I should take into consideration?
- Is there any area or skill I feel I need more support with?

Being a PATH leader can have challenges, so on behalf of the Michigan Partners on the PATH, we **thank you for your passion for the community**. Without you leading these PATH workshops, the partners within the state of Michigan could not have reached everyone that we have over the years. Below are a few testimonials from participants that shows just how important you are to the success of the workshop:

"This was an amazing workshop. The presenters were all wonderful and very knowledgeable. It was a pleasure to attend the session. I learned a lot. Thank you for offering it. It was very much appreciated. I definitely plan on using everything I learned now and in the future."

"This was a wonderful experience! Very well instructed. Will highly recommend it. Worth every minute."

What does the Data Look Like?

Over **27,000 people** have participated in over **2,500 PATH classes** between **2007 and 2017** throughout the state of Michigan. On average, **71%** of those who enroll complete PATH. This includes all the PATH programs that Michigan offers.

Participants Perception of the Leaders



The **PATH Promise** is an agreement between organizations that both lead and oversee organizations that provide the PATH program in the state of Michigan to ensure that all PATH programs uphold fidelity based on the PATH Program Fidelity Commitment. The logos below represent organizations that have made the PATH Promise.

CENTERS FOR MEDICARE & MEDICAID SERVICES





MICHIGAN | MINNESOTA | WISCONSIN

PROMOTING HEALTH • INDEPENDENCE • CHOICE