

HEALTH COACHING FIDELITY & SUPERVISION CHECKLIST

Date of Session:

Participant ID:

Rater's Initials:

Site:

Session Number:

Coach Initials:

DurationMin **1. How long was this session?** (write in the number) ____ minutes

Mode **2. Session Mode?**

__ a) Baseline __ b) Telephone

Met **3. Overall, do you feel that the objectives of the session were:** (circle)

*Automatic calculation from Summary Scores 1-3 in Section 5: (Range 0-30)

30 = Fully Met 25-29 = Mostly Met 20-24 = Partly Met 15-19 = Somewhat Met <15 = Not Met

4. General Session characteristics

- Fixed __ Participant was fixed on one topic (would not move on)
OnTopic __ Participant/group stayed on topic (minimal tangential conversation)
Short __ Participant had to cut the session short/group ended early
Disruptive __ Patient was disruptive
Abusive __ Patient was abusive
PtInter __ Interruptions (from patient's environment)
StInter __ Interruptions (from staff member's environment)
Other __ Other: _____

5. Session Core Elements

KEY for Summary Scores 1-3 (should be no NAs for this section):

0: Did not cover = this topic or focus point did not happen at all

1: Partially covered = this happened to some extent, but not completely

2: Fully covered = the goal was met fully

Summary Score 1 (Baseline ONLY): Review – Baseline health coaching session

- Binder __ a – Health Coach outlines content of the binder
WeightLossGoal __ b – Health Coach discusses weight loss goal
NutritionGoal __ c – Health Coach discusses nutrition goals (i.e. turns into SMART goal)
PAGoal __ d – Health Coach discusses physical activity goal (i.e. turns into SMART goal)
Barriers __ e – Health Coach discusses barriers to weight management
Handouts __ f – Health Coach refers to handouts to discuss weight management strategies and barriers
Resources __ g – Health Coach discusses intensive interventions (i.e. turns into SMART goal)
SelfMonitor __ h – Health Coach discusses self-monitoring tools (i.e. journaling, pedometer, smartphone apps)
SummaryB __ i – Health Coach summarizes session (i.e. reviews SMART goals, refer to PACT teams)
FollowupB __ j – Health Coach summarizes contact information and sets up follow-up appointments

Summary Score 1 (Telephone ONLY): Review – Goal attainment and self-monitor check-in

- GoalAtt __ a – Health Coach prompts review of goal attainment (i.e., review of goals *versus* actual)
ResourcesUse __ b – Health Coach determines use of resources (and/or discusses barriers) and collects usage data
SelfMonitorUse __ c – Health Coach determines use of self-monitoring tools (and/or discusses barriers) and collects usage data
Succ/Fail __ d – Health Coach discusses successes/failures (facilitators/barriers) since last session
GoalUpdate __ e – Health Coach initiates problem-solving approach when necessary to address barriers and update goals
MTGnutrition __ f – Health Coach updates response to MTG nutrition questions
MTGphysical __ g – Health Coach updates response to MTG physical activity questions
Safety __ h – Health Coach elicits any study or non-study related medical or adverse events from the participant
SummaryT __ i – Health Coach summarizes session (i.e. reviews new SMART goals)
FollowupT __ j – Health Coach sets up follow-up appointments

Summary Score 2: Core Psycho-educational Content

- MotivInterv ___ a – Health Coach uses MI techniques to develop a self-management skills or change cognition
Tailored ___ b – Health Coach tailors session by assessing knowledge of topic, degree of relevance to their weight management practices, and increasing knowledge/skills

Summary Score 3: Action Planning and Session Wrap-up

- Goal ___ a – Health Coach prompts participant to identify SMART goals to work on before the next session
Confidence ___ b – Health Coach assesses participant's motivation and self-confidence/readiness to follow-through on plan
Agreement ___ d – Health Coach and participant come to agreement on small change goals

KEY for Summary Scores 7-10:

0: Did not demonstrate = this process objective or component was not demonstrated at all

1: Inconsistently Demonstrated = this happened to some extent, but not all of the time

2: Demonstrated consistently through entire session = objective was demonstrated consistently and appropriately throughout the entire session

9: NA

7. Summary Score 4: Interventionist Personal Characteristics

- Didactic ___ Health Coach delivered didactic material in a matter of fact and friendly way
Nonjudge ___ Health Coach avoided judgmental feedback on participant(s) contributions
Empathy ___ Health Coach responded empathically and accurately to individual or group member behavior (verbal, nonverbal)

8. Summary Score 5: Session Structure

- Organized ___ Health Coach came prepared and organized
Timing ___ Time was allocated appropriately in order to cover the appropriate content focus points for that session

9. Summary Score 6: Session Flow

- Process ___ Health Coach addressed process (tangential) issues but did not allow them to disrupt content agenda
Modulation ___ Health Coach modulated distractions (e.g., side bar conversations, interruptions by family members)
Delving ___ Health Coach avoided delving too deeply into psychological issues

10. Summary Score 7: Engagement with Patients

- Questions ___ Health Coach facilitated discussion and interaction using open-ended questions, affirmations, reflections, summaries
Clarified ___ Health Coach elicits clarification of participant(s)' engagement by seeking feedback about didactic content

11. What activities or additional topics were added to any aspect of the session? (Describe)

12. Additional Comments