

APPENDIX F: COACHING FIDELITY & SUPERVISION CHECKLIST (SIMPLE 7)

Date of session: ____/____/____	Participant ID: _____	Rater's Initials: _____
Site: _____	Session Number: _____	Coach Initials: _____

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

2. Overall, do you feel that the objectives of the session were: (*check*)

10 = *Fully Met* **8-9** = *Mostly Met* **6-7** = *Partly Met* **5** = *Somewhat Met* **<5** = *Not Met*

3. Session Core Elements

KEY:

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

1: Partially covered = this happened to some extent, but not or all group members, all of the time (e.g., Decision Coach facilitated discussion, but only among certain members of the group or began to demonstrate with individual participant but did not follow-through to adequate resolution)

2: Fully covered = the goal was met fully for all participants

– **should be no NAs for this section**

___a – Decision Coach makes it clear that the coach does not have medical expertise and can not answer any medical questions.

___b – Decision Coach describes goal and purpose of coaching

___c – Decision Coach assesses patient's values and goals related to selected Simple 7 topic

___d – Decision Coach assesses patient's knowledge of selected Simple 7 topic and associated risks

___e – Decision Coach elicits discussion about patient's plans to address selected Simple 7 topic

___f – Decision Coach elicits discussion about patient's concerns regarding patient-physician communication

___g – Decision Coach offers patient opportunity for role play of appointment

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KEY:

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

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

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

4. Action Planning and Session Wrap-up

- ☐ a – Decision Coach reviews and affirms content in coaching output
- ☐ b – Decision Coach offers to accompany patient in clinic visit and take notes
- ☐ c – Decision Coach offers to provide a copy of Life's Simple 7 educational tool
- ☐ d – Decision Coach gives patient the coaching output

5. Interventionist Personal Characteristics

- ☐ Decision Coach delivered didactic material in a matter of fact and friendly way
- ☐ Decision Coach avoided judgmental feedback on participant(s) contributions
- ☐ Decision Coach responded empathically and accurately to individual or group member behavior (verbal, nonverbal)
- ☐ Decision Coach avoided leading questions
- ☐ Decision Coach avoided providing any medical advice (e.g., health/diet recommendations)

6. Session Structure

- ☐ Decision Coach came prepared and organized
- ☐ Time was allocated appropriately in order to cover the appropriate content focus points for that session

7. Session Flow

- ☐ Decision Coach customized session content to the patient
- ☐ Decision Coach addressed process (tangential) issues but did not allow them to disrupt content agenda
- ☐ Decision Coach modulated distractions (e.g., side bar conversations, interruptions by family members)

8. Engagement with Patients

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

9. Additional Comments