An Overview of Fidelity Monitoring Expectations

Maria Pena
Office of Adolescent Health

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Today's Presentation

- Definition of fidelity and why it's important
- Components of a fidelity monitoring system
- Fidelity monitoring expectations for grantees
- Q&A

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Fidelity Monitoring

- OAH's Definition of Fidelity:
  - The degree to which a program is implemented **with adherence** to it's **core components.**
  - **Core components:** the key ingredients related to achieving the outcomes associated with the program model.
    - **Program Content -** what is being communicated
    - **Program Delivery –** how it is communicated

OAH Resources for Fidelity Monitoring

- OAH has provided you with the following tools:
  - *Maintaining and Monitoring Fidelity in Teen Pregnancy Prevention Programs*
  - Fidelity Monitoring Plan Template
  - *Adaptations for Evidence-Based Teen Pregnancy Prevention Programs*
  - TPP Adaptation Guidance for New Grantees
  - Implementation Plan Template and Instructions
  - Resources on the TPP Performance Measures System: https://tpp.rti.org/Resources.aspx

Maintaining Fidelity

- Ensures implementation of the intended program
- Increases the likelihood that the participants served will experience similar outcomes of the original study
- Use as a training tool for staff and facilitators
- Identifies a poor fit between activities and target population which may call for adjustment
- Allows for continuous improvement of program implementation

Maintaining Fidelity Does NOT Mean

- Reading word for word from the script
- Not being responsive to the population served
- Never making adaptations

Fidelity Monitoring System Components

Establish a Fidelity Monitoring Plan

Collect Fidelity Monitoring Data

Review & Analyze Data

Provide Feedback on Regular Basis

Continuous Quality Improvement

Establishing Fidelity Monitoring Plan

- Establish process and procedures for monitoring fidelity
  - ***OAH Fidelity Monitoring Plan Template***
- Gather and finalize data collection tools
- Train all facilitators in the program
  - Including logic model, theory, and core components
- Identify and train observers

Collecting Fidelity Monitoring Data

- At a minimum:
  - Attendance Data
  - Sessions Implemented
  - Facilitator Self-assessment or Fidelity monitoring logs
  - Observation Data – 5% (1B) and at least 10% (1A)
    - Fidelity Monitoring log (Program content)
    - Observation Form (Quality)
  - Fidelity Process Report Form

Participant Attendance Data

Collected by:	Program facilitator
Purpose:	Record attendance of participants at all sessions
Grantee Role:	Collect and review attendance logs from facilitators and address any attendance issues
Tools:	Attendance log

Why Collect Attendance Data?

- Ensures participants receive the program as implemented
- Identifies attendance issues/challenges
- Provides program with information for decision-making and quality improvement

Sessions Implemented

Collected by:	Program facilitators
Purpose:	Ensures sessions are implemented as intended at all sites/settings
Tools:	Captured via attendance logs and/or fidelity monitoring logs

Facilitator Self-Assessment or Fidelity Monitoring Logs

Completed by:	Program facilitator
Purpose:	Record content covered & any adaptations
Grantee Role:	Collect and review completed logs Provide ongoing feedback to facilitators
Tools:	Fidelity monitoring logs

Why Collect Fidelity Monitoring Logs?

- Enables you to look across facilitators and across sessions to see what content is being delivered
- Allows you to identify any issues related to session content

EXAMPLES:

- Multiple facilitators unable to cover all content in one session
- Individual facilitators can’t cover all content in session
- Adaptations consistently being made to the same activity in the same session
- Others

Observation Data

Completed by:	Trained observers
Purpose:	Observe at least 5% (1B) or 10% (1A and 2B) of sessions annually to track content & quality
Grantee Role:	Collect & review data to provide feedback to facilitators
Tools:	Fidelity monitoring log OAH Program Observation Form

Why Collect Observation Data?

- Verifies self-report data from the program facilitator by an independent observer
- Enables you to look across facilitators and across sessions for content and quality
- Enables you to identify any issues related to content or quality

EXAMPLES:

- Self-report data from facilitator on content covered doesn’t match observation data
- Observer identifies implementation quality issues that can be addressed with additional training
- Others

Review & Analyze Data

- Develop a plan for reviewing data on an ongoing basis
  - Determine person(s) responsible for review and analysis
  - Frequency of data entry
  - Sharing results with team/org
- Review data on regular basis to identify issues/challenges

Provide Regular Feedback on a Regular Basis

- It's not enough to review/analyze your data, you must also provide feedback to those implementing the program
- Develop a plan for providing feedback to facilitators on a regular basis
  - Determine who will provide the feedback
  - How feedback will be delivered– written, one-on-one, other
  - When feedback will be provided
  - Frequency of providing feedback
- Feedback is necessary to make necessary adjustments

Continuous Quality Improvement

- Overall purpose of monitoring fidelity is to continuously improve the quality of your program
- Identifies both the strengths and areas of improvement in program implementation
- Collecting, reviewing, and discussing data collected allows you to:
  - Ensure content is provided as intended
  - Make adaptations as necessary
  - Improve program delivery and fit
  - Make adjustments as necessary to improve overall program

QUESTIONS?

Adaptations for Evidence-based Teen Pregnancy Prevention Programs

Tish Hall
Office of Adolescent Health

TPP Tier 1 Orientation
November 16, 2015

Agenda

- Identify terms
- Define adaptations
- Examples of minor and major adaptations
- Strategies to increase fidelity and manage adaptations

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Terminology

- **Fidelity**- the degree to which an EBP is implemented with adherence to the core components.
- **Core components-** the parts of program or implementation determined by the developer to be the "key ingredients" to achieving program outcomes.
- **Program content-** *what* is being communicated in the program sessions.
- **Program delivery** – *how* the content is delivered.

Defining Adaptations

Adaptations to evidence based programs (EBPs) are changes to the **program content**, **program delivery**, or **core components**.

Minor versus Major

- **Minor adaptations** – do not significantly affect the program core components **(green light)**
- **Major adaptations** – those that significantly change the core components **(yellow** or **red)**

Figure 1: Characteristics of Minor and Major Adaptations

Minor Adaptations	Major Adaptations
•Do not significantly change program content •Do not significantly change program delivery •Do not change core components of the program •Do not compromise program fidelity	•Significantly change program content •Significantly change program delivery •Change core components of the program •Can compromise program fidelity

Examples of minor and major adaptations

Figure 2: Examples of Minor and Major Adaptations

Minor Adaptations	Major Adaptations
• Adding icebreakers, team-builders, energizers, or reflection activities • Adding a session on reproductive anatomy • Providing updated or local statistics • Providing information about local services (e.g., teen-friendly health centers) • Adding implementation strategies to better engage participants • Revising materials to ensure inclusivity and cultural relevancy (e.g., changing names in role plays) • Changing minor wording (e.g., "group rules" to "group agreement") • Implementing a program designed for 15-16 year olds with 17 year olds because some students have repeated grades	• Omitting an entire lesson • Omitting a key activity, such as a condom demonstration or an activity designed to practice a skill • Decreasing the number or length of sessions • Increasing student to teacher ratio • Shortening or eliminating program videos • Implementing a program designed for 15-16 year olds with 10-12 year olds

Allowable Adaptations for TPP Grantees

Minor Adaptations

- Allowed
- Do not require prior approval
- Reported to project officer during regular calls
- List of minor adaptations included in semi-annual progress reports

Major Adaptations

- Strongly discouraged
- Seen as possible sign of poor program fit
- Must be approved by OAH prior to implementation

Requesting Approval for Major Adaptations

- Determine if adaptation is major
  - If unsure, submit as a major adaptation
- If major, complete **Major Adaptation Request Form**
- OAH adaptation review team, program model lead, and project officer will review, consult with developer, and determine if allowable
  - Estimate 6 weeks for review process
- If approved, all associated materials must be reviewed for medical accuracy
- If approved, report back to OAH on status and outcome of adaptation after 6 months

Planned versus Unplanned Adaptations

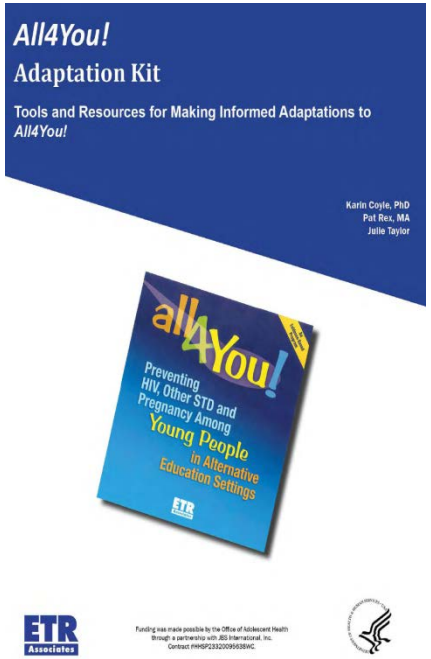
- Planned adaptations
  - Proactively identify any needed adaptations prior to beginning implementation
  - Recommend piloting program without adaptations first to see if adaptation are needed

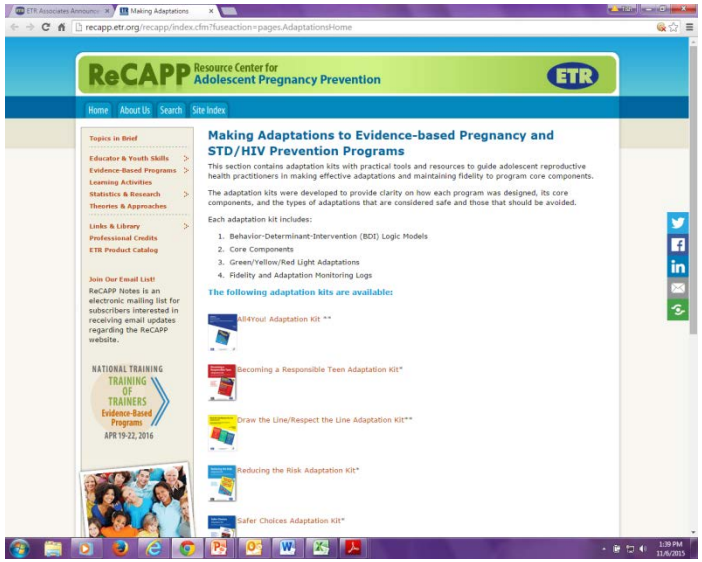
- Unplanned adaptations
  - Occur during program implementation and are not planned in advance
  - Have system in place to identify unplanned adaptations that occur

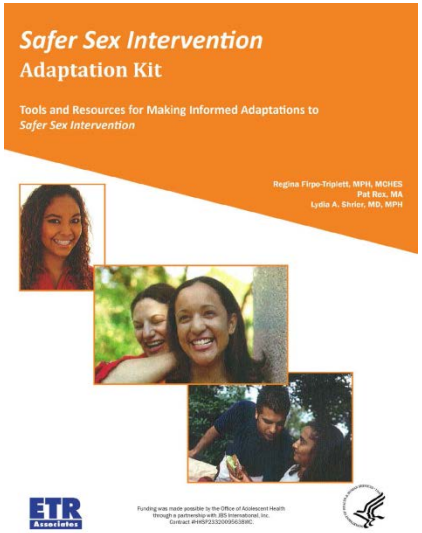
Strategies that **implementers** can employ:

- Ensure program fit by carefully selecting an EBP that meets youth and community needs, implementation setting, capacity of implementing organization, and intended outcomes.
- Ensure effective implementation of the program through fidelity monitoring and use of data for continuous quality improvement.
- Choose partners with sufficient capacity to implement the program.
- Develop an internal system for handling adaptation requests from front-line staff.
- When adaptations are necessary, plan them prior to implementation, using information available on allowable adaptations from the OAH website, an adaptation kit, or conversations with the program developer.
- When unplanned adaptations occur, keep a record of them.
- Create “report cards” for key partners and stakeholders.
- Remind partners that maintaining fidelity is important and ensure that facilitators understand why it’s important.

Adaptation Kits







Available Resources

- **TPP EBPs At-a-Glance** – we developed this tool to help organizations easily see some of the differences between the various TPP EBPs – it seems to be very useful to grantees as we've gotten lots of positive feedback since it was released.
- **Developer Interviews**
- **Advice from the Field** -- General and EBP-specific advice from previous OAH TPP grantees.
- **Adaptations** -- Examples of general and EBP-specific adaptations that have been previously implemented by OAH TPP grantees
- **Plan Before You Budget**: Implementation costs to keep in mind.

QUESTIONS?