

TITLE

CHRONIC DISEASE SELF-MANAGEMENT PROGRAMS AND SERVICES**SCOPE**

Provincial Chronic Disease Management Programs

DOCUMENT

HCS-22-01

APPROVAL LEVEL

Executive Director Primary Care, Community & Rural and Chronic Disease Management

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Senior Director, Chronic Disease Management

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NOTE: The first appearance of terms in bold in the body of this document (except titles) are defined terms – please refer to the Definitions section.

If you have any questions or comments regarding the information in this standard, please contact the Policy & Forms Department at policy@albertahealthservices.ca. The Policy & Forms website is the official source of current approved policies, procedures, directives, and practice support documents.

OBJECTIVES

- To provide standardized chronic disease self-management services/programs across the province.
- To identify the parameters of licensing agreements for the Alberta Health Services Better Choices, Better Health® program.

APPLICABILITY

Compliance with this practice support document is required by all Alberta Health Services employees, members of the medical and midwifery staffs, students, volunteers, and other persons acting on behalf of Alberta Health Services (including contracted service providers as necessary). This practice support document does not limit any legal rights to which you may otherwise be entitled.

STANDARD

1. **Alberta Health Services will use the following self-management programs:**
 - 1.1 Better Choices, Better Health® (English, French, Tagalog, Chinese, Punjabi, and Hindi);
 - 1.2 Better Choices, Better Health® - Online;

- 1.3 Better Choices, Better Health® - Chronic Pain; and
- 1.4 Better Choices, Better Health® - Diabetes (English and French).
- 1.5 Other programs may be considered if strong evidence supports the use over and above non-disease specific programming and if Zone funding is in place.
- 1.6 Additional programs or programs offered in additional languages may be considered and added to the license upon approval by the Licence Owner (Director, Self-Management, Chronic Disease Management).

2. Use Of Licensed, Trademark, or Copyright Materials or Logos

- 2.1 Stanford Self-Management Programs License
 - a) Use of the Stanford Self-Management Program materials is restricted to the terms outlined in the license agreement between Alberta Health Services and Stanford University for the Stanford Self-Management Programs-Multiple Program License.
 - b) Specific to the online program, use of the Stanford Self-Management Program materials is restricted to the terms outlined in the license agreement between Alberta Health Services and National Council on Aging
- 2.2 Better Choices, Better Health® Registered Trademark License
 - a) Use of the Better Choices, Better Health® name and logo is restricted to the terms outlined in the Better Choices, Better Health® Registered Trademark License agreement between Alberta Health Services and the National Council on Aging.

3. Training and Certification

- 3.1 Alberta Health Services staff or volunteers must be trained to deliver any of the above listed self-management programs. There are three (3) levels of leader training for the Stanford Self-Management Program:
- 3.2 Workshop Leader Certification
 - a) To become certified as a Workshop Leader, an individual must successfully complete a full four (4) day training session and lead a six (6) week workshop within twelve (12) months of training.
 - b) To remain certified as a Workshop Leader an individual must lead a minimum of one (1) workshop every year for each program for which the Workshop Leader is certified. An alternative option is to attend a refresher course. The option of a refresher course should not be used more than once every 2 years.

- c) Workshop Leaders can become certified in more than one self-management program.
- d) Each Workshop Leader is responsible for ensuring that they complete all necessary requirements to maintain their Workshop Leader certification as outlined above.

3.3 Master Trainers Certification

- a) A certified Master Trainer can conduct Workshop Leader Training sessions.
- b) To become a Master Trainer an individual must successfully:
 - (i) complete a full four and one-half (4.5) day training session;
 - (ii) facilitate a minimum of two (2) - six (6) week workshops within twelve (12) months of completing training; and
 - (iii) complete the Master Trainer Agreement and Certification form and submit the form to Stanford University for approval.
- c) Master Trainers cannot conduct Workshop Leader training sessions until certification notice is received from Stanford University.
- d) To remain a certified Master Trainer an individual must conduct the first Workshop Leader training session within eighteen (18) months of original training. Every fiscal year (April 1 to March 31) an individual must conduct either:
 - (i) One (1) full four (4)-day Leader Training session; or
 - (ii) One (1) - six (6)-week workshop.

Note: a full four (4)-day Workshop Leader training session must be conducted at least every other year in one (any) program for which the Master Trainer is certified.

- e) Master Trainers can become certified in more than one Self-Management Program. They must facilitate at least one (1) workshop in any other program before training Workshop Leaders in that program.
- f) Each Master Trainer is responsible for ensuring that they complete all necessary requirements to maintain their Master Trainer certification as outlined above.
- g) Master Trainers will have to be re-trained if they fail to facilitate community or leader training workshops for any program within 12 months.

3.4 T-Trainers Certification

- a) The Provincial Self-Management Team will determine when additional T-Trainers are required and will call for applications from qualified Master Trainers.
- b) To qualify for T-Trainer status, an individual must:
 - (i) hold a current Master Trainer Certification in the desired program;
 - (ii) have facilitated three (3) workshops and three (3) Leader Trainer sessions; and
 - (iii) be affiliated with an organization that holds a license for the program (i.e., Alberta Health Services).
- c) Participation as a T-trainer must be approved by the candidate's Zone leadership before the individual submits an application to Stanford University to obtain a Stanford apprenticeship placement.
- d) To remain certified as a T-Trainer:
 - (i) one (1) full four (4)-day Workshop Leader training session or a full four and one-half (4.5) day Master Trainer session must be conducted each fiscal year (April 1 to March 31); and
 - (ii) a full four and one-half (4.5) day Master Trainer session must be conducted at least every other year.
- e) T-Trainers can become certified in more than one self-management program. If T-Trainers are certified in more than one program, they must facilitate workshops or train Workshop Leaders or Master Trainers in every program a minimum of every two (2) years.
- f) Each T-Trainer is responsible for ensuring that they complete all necessary requirements to maintain their T-Trainer certification as outlined above.

3.5 Additional mentoring and support will be provided as identified and agreed upon to sustain trainers.

4. Volunteer Recruitment and Policy

4.1 Volunteer Policy

- a) Please refer to the Alberta Health Services Volunteers Policy for more information on volunteer involvement with Alberta Health Services programs or services.

4.2 Volunteer Recruitment

- a) The Alberta Health Services Volunteer Resources department and/or the Better Choices, Better Health® Zone coordinators are responsible for the recruitment of all volunteers. Please refer to the Volunteer Involvement: Volunteer Resources Guidebook for more information.

4.3 Volunteer Recognition

- a) Volunteer leaders and trainers will not receive honorariums for their service.
- b) Please refer to the document Employee Tool Kit to Support and Recognize Volunteers or contact volunteer resources for more information on volunteer recognition.

5. Reimbursement of Expenses

5.1 All expense reimbursements shall comply with the Alberta Health Services Travel, Hospitality, and Working Session Expenses - Approval, Reimbursement, and Disclosure Policy.

5.2 Zones will reimburse workshop leaders for the following expenses:

- a) Accommodation expenses incurred to attend multiple day training or meetings will be reimbursed after receipts are submitted to the Zone Coordinators. Reimbursement for accommodation must be approved prior to booking.
- b) Travel reimbursement when using their own vehicle is at the standard Alberta Health Services rate (union or exempt rate for staff, management exempt rate for volunteers). Alberta Health Services staff must complete an expense claim form and volunteers must submit a written request for reimbursement along with original receipts to the Better Choices, Better Health® Coordinator in their zone. Alberta Health Services fleet vehicles may be used by staff or volunteers (if they are available) to travel to workshops. Volunteers may also submit a request to cover travel costs when local transportation services are utilized.
- c) Parking at non-Alberta Health Services locations will be reimbursed in full with a receipt. Without a receipt, the rate is \$3.00 per hour. Alberta Health Services staff must complete an expense claim form and volunteers must submit a written request for reimbursement. Volunteer Resources can arrange for free parking for volunteers at Alberta Health Services sites.
- d) Supplies, if needed, purchased for the workshop. Alberta Health Services staff must complete an expense claim form and volunteers must submit a written request for reimbursement along with original receipts to the Better Choices, Better Health® Coordinator in their zone.

6. Referral to Self-Management Programs

- 6.1 Individuals can be referred by a health care professional or can self-refer to the Better Choices, Better Health® program. Individuals are defined as those with a chronic condition(s). An individual's caregivers or support persons can also be referred or can self-refer to attend the program.

Referral to the Better Choices, Better Health® program can be made through the HEALTH Link Alberta call centre or through Zone program offices or zone referral forms. Contact information for Zone programs and zone referral forms are listed on the Better Choices, Better Health® program webpage on the external Alberta Health Services website

<http://www.albertahealthservices.ca/bcbh.asp>

7. Better Choices, Better Health® Workshop Delivery

7.1 Self-Management Program Fidelity.

- a) Program fidelity refers to our commitment to the Stanford University Licensing agreement as outlined in the Stanford Self-Management Program Fidelity and Implementation Manuals. Any questions regarding fidelity should be directed to the Consultant for Chronic Disease Management (CDM) and Self-Management.
- b) The following are some examples of fidelity recommendations that Better Choices, Better Health® Program strives to achieve:
- (i) physical environment and material resources:
- ensure that a Workplace Health and Safety site orientation/safety check is completed prior to booking venue;
 - ensure that an Alberta Health Services Event Agreement is completed and submitted prior to commencing a Better Choices, Better Health® workshop in a community venue;
 - ensure that adequate and quality materials and supplies are available for each workshop;
 - ensure that the location, facility, and room used for Better Choices, Better Health® program is appropriate for the target population;
 - program offered is two and a half (2.5) hours a week for six (6) weeks; and
 - program venue should be safe, accessible to people with disabilities, and accessible via public transportation (if available); and

- (ii) leader performance:
- two (2) trained leaders will facilitate each workshop;
 - leaders must be present for each session (arrive on time and not leave early);
 - facilitation techniques should be used appropriately and effectively by leaders;
 - a weekly attendance record must be maintained for every Better Choices, Better Health® program; and
 - a list of names and phone numbers of participants must be kept by workshop leaders for emergency and follow-up purposes during the six (6)-week program. Participant lists must be sent to the Better Choices, Better Health® Zone Coordinator at the conclusion of the six (6)-week program. The Coordinators will keep record of the participant lists for reporting purposes and will shred and discard participant lists after the data is recorded.
- c) The following are examples of poor fidelity:
- (i) providing material that is not in the manual;
 - (ii) using the manuals but altering the lecture material;
 - (iii) not following the times and sequence of activities and sessions as indicated in the manual;
 - (iv) inviting outside speakers to talk to the participants;
 - (v) leaders openly disagreeing or arguing in front of the group; and
 - (vi) giving medical advice to participants.

7.2 Conflict of Interest

- a) The actions of staff and volunteers should be guided by the Alberta Health Services Code of Conduct.
- b) As per the Conflict of Interest Bylaw, Alberta Health Services Representatives are expected to fulfill their responsibilities in a manner that avoids involvement in any potential, perceived, or real conflict of interest situations, and to promptly disclose and address any conflicts should they arise.

7.3 Collection, Use, and Protection of Health Information

- a) Health information is collected by Alberta Health Services in accordance with the Health Information Act (HIA).
- b) Better Choices, Better Health® leaders must put up a copy of the poster developed by the Information & Privacy department, which outlines details about the collection, use, and protection of health information (see Appendix A - *Health Information Collection Poster*).

7.4 Number of Participants

- a) Based on Stanford guidelines, the Alberta Health Services Provincial standard is to aim for a minimum of 10 and a maximum of 16 participants for urban and populated areas.
- b) For rural locations, Zone leadership can use their judgement regarding appropriate class size for workshops in their area.
- c) Cancellation of a workshop due to low registration is at the discretion of the Better Choices, Better Health® coordinators in each zone.

7.5 Workshop Materials and Supplies

- a) All workshop supplies and materials are to be provided to the Workshop Leaders by the Zone programs.
- b) Workshop charts should be hand written on flipchart paper, as per the guidelines in Appendix 1 of the Leader Manual. Other audio visual media, such as slides or PowerPoint, should not be used to present material with the exception of the Program audio CD's.

7.6 Better Choices, Better Health® Workshop Adaptation (refer to Standard 1)

- a) Better Choices, Better Health® is a scripted workshop. Any adaptation (including translation of materials) being considered must be discussed with and approved by the Stanford Program License Owner (Director, Self-Management, Chronic Disease Management). The Director must obtain written permission from Stanford University before creating any derivatives of the program.
- b) Workshops are available in different languages (i.e., English, French, Chinese, Punjabi, Tagalog, and Hindi) and are delivered where available resources exist. Use of interpreters at the workshop is not permitted.

8. Repository of Resources

8.1 Education Materials for Participants

- a) Materials (books and CDs) are purchased by the Provincial Self-Management team and managed by the Consultant for CDM and Self-Management. Materials are distributed to the Zones. The Zones are responsible for distributing and loaning materials for the duration of a workshop.

8.2 Workshop Marketing Materials

- a) A marketing toolkit is available and is managed by the Consultant for CDM and Self-Management.
- b) Marketing materials are purchased by the province and distributed to the Zones for program promotion. Additional marketing materials can be developed and/or purchased at the discretion of the zone.

DEFINITIONS

Workshop Leaders, for the purposes of this Standard only, are those Alberta Health Services staff or volunteers who facilitate Better Choices, Better Health® workshops. These workshops are facilitated in pairs.

Master Trainers, for the purposes of this Standard only, are the people who train Workshop Leaders. These workshops are facilitated in pairs. Master Trainers also act as Workshop Leaders.

T-Trainers, for the purposes of this Standard only, are the people who train Master Trainers. These workshops are facilitated in pairs. T-Trainers are also Master Trainers and Workshop Leaders.

Self-Management, for the purposes of this Standard only, is what people with a chronic disease do (their action and behaviour) to cope with how their disease affects them.

REFERENCES

- Appendix A - Health Information Collection Poster
- Alberta Health Services Code of Conduct
- Alberta Health Services Conflict of Interest Bylaw
- Alberta Health Services Employee Tool Kit to Support and Recognize Volunteers
- Alberta Health Services Travel, Hospitality, and Working Session Expenses - Approval, Reimbursement, and Disclosure Policy #1122.
- Alberta Health Services Volunteer Involvement: Volunteer Resources Guidebook
- Alberta Health Services [Volunteers Policy #1128](#)
- *Health Information Act* (Alberta)
- [Better Choices, Better Health®](#) webpage

- [Implementation Manual](#) - Stanford Self-Management Programs 2008
- Leader manual - Stanford Self-Management Program 2008
- [Program Fidelity Manual](#) - Stanford Self-Management Programs 2012 Update

REVISIONS

February 18, 2015

APPENDIX A

Health Information Collection Poster



Your
health
information
is
collected
and
protected
under
Alberta's
Health
Information
Act



Alberta Health Services (AHS) respects your confidentiality and privacy. Your information is collected, used, disclosed and protected according to the provisions of provincial and federal legislation.

Your health information is collected by AHS in accordance with section 20 of the *Health Information Act* (HIA). The purpose of this collection is primarily for:

- providing health services
- determining eligibility for health services
- processing payments for health services
- conducting research
- providing for health services provider education, and
- internal management purposes.

Information will be collected directly from you, except in the limited circumstances where we are authorized by the HIA to indirectly collect such information.

Questions related to the collection and privacy of your information should be directed to:

Chief Privacy Officer
Information & Privacy
10301 Southport Lane SW
Calgary, AB T2W 1S7

Telephone: 1-877-476-9874
Email: privacy@albertahealthservices.ca



PROTECTING INFORMATION
is everyone's responsibility