

**Peer Navigator Fidelity Assessment**

The Research Assistant (RA) will directly observe the PN for three (3) hours and fill out this assessment form. Each PN will be assessed once per month. The RA will contact the PN 24 hours in advance of the scheduled observation session to make arrangements to meet PN in the community. The PN should explain the presence of the RA to participants on their calendar during the observation period. Participants should be informed that if they prefer to speak to the PN in private (without the presence of the RA), this is permissible. During scheduled PN breaks, RA should document this in the log, but do not need to be in PN presence. The form will be turned in to PN Supervisor and will be shared with the PN.

Assessor’s Name: \_\_\_\_\_ Assessment date: \_\_\_\_/ \_\_\_\_/\_\_\_\_\_

Peer Navigator (PN) Name \_\_\_\_\_

Location \_\_\_\_\_

Hours Observed (e.g. 9:00 am – 12:00 pm) \_\_\_\_\_

Scheduling Notes \_\_\_\_\_

**Fidelity Observation Record**

**Instructions:** Record specific timeframes and activities performed by PN (e.g. exercised with participant, paperwork, phone outreach)

**Sample**

Time: 9:00 am- 10:00 am      Activity: *Traveled with participant to park district to enroll for gym membership*

Time: \_\_\_\_\_      Activity: \_\_\_\_\_

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**Fidelity Observation Index**

\_\_\_\_Number of participants scheduled for meetings/sessions during time frame

\_\_\_\_Number of participants meetings that took place during time frame

\_\_\_\_Number of participants met in the community

\_\_\_\_Amount of time in the community (in minutes)

\_\_\_\_Number of participants met at HAH or ACCESS clinic

\_\_\_\_Amount of time at HAH/ACCESS clinic (in minutes)

\_\_\_\_Amount of time liaising with other providers outside HAH/ACCESS (in minutes)

\_\_\_\_Amount of time liaising with other PN team members (in minutes)

\_\_\_\_Amount of time supervised by PN team manager (in minutes)

\_\_\_\_Number of participants contacted via phone

\_\_\_\_Amount of time spent on the phone with participants

\_\_\_\_Amount of time spent on other activities (in minutes). Please specify each “other” activity and time spent on each activity here:

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Notes:

**Fidelity Work Performance**

Instructions: Choose the appropriate number below and makes notes or comments in the spaces. If you do not have an opportunity to observe the PN in situations where they should be using the skill, select “N/A.”

Criteria	1	2	3	4	5	6
	Unsatisfactory level of skill	Marginal level of skill	Satisfactory level of skill	High level of skill	Superior level of skill	N/A
<p><b><u>Attending Skills:</u></b>  <u>Posture of involvement</u> from the PN to know that their message is being heard.  <u>Appropriate body language</u> with simple motions of nodding or leaning forward to know they are paying attention  <u>Eye contact</u> from the PN while the participant talks unless eye contact makes them uncomfortable  <u>Non-distracting environment</u> that create less barriers between the PN and the participant.</p>						
Notes:						
<p><b><u>Following Skills:</u></b>  <u>Door openers</u> from the PN that provide an invitation to talk for participants that excludes roadblocks  <u>Minimal encouragers</u> that PN use like simple statements such as ‘go on’ or a nod that let the participants know they are listening  <u>Infrequent questions</u> that PN use to direct the participant with open-ended questions that encourage them to continue talking  <u>Attentive silence</u> where PN lets the participant do most of the talking</p>						
Notes:						

Criteria	1	2	3	4	5	6
	Unsatisfactory level of skill	Marginal level of skill	Satisfactory level of skill	High level of skill	Superior level of skill	N/A
<p><b>Reflecting Skills:</b>  <u>Paraphrasing:</u> restates the participant’s message in the PN’s words  <u>Reflecting feelings:</u> focus on hidden messages of what the participant is saying by listening for feeling words and observing body language  <u>Reflecting meaning:</u> ties the obvious and hidden messages together  <u>Summary reflections:</u> summarizes the conversation so participant can reflect themes.</p>						
Notes:						
<p><b>Assessing health concerns:</b> PN identifies with participant health goals based off health concerns the participant has.</p>						
Notes:						
<p><b>Setting health goals:</b> PN identify and develop health goals for the participant that focus on strengths and resources needed, in which the PN may use the Goal-Setting IN-THE-FIELD PRACTICE SHEET with participants as a tool.</p>						
Notes:						
<p><b>Motivational Interviewing:</b></p> <ul style="list-style-type: none"> <li>• Expressing empathy by reflective listening.</li> <li>• Develop discrepancy between client’s goals and current behaviors</li> <li>• Avoid argument and confrontation.</li> <li>• Roll with resistance. PN responds to resistance with warmth and understanding.</li> <li>• Support participant optimism and self-efficacy</li> </ul>						
Notes:						

Criteria	1	2	3	4	5	6
	Unsatisfactory level of skill	Marginal level of skill	Satisfactory level of skill	High level of skill	Superior level of skill	N/A
<p><b>Strengths Model:</b> PN applies the seven principles:</p> <ul style="list-style-type: none"> <li>• People can recover and transform their lives</li> <li>• Focus on strengths, not deficits</li> <li>• Community is a resource</li> <li>• Family and close friends are a resource and support</li> <li>• Participant is the director of the helping process</li> <li>• PN/Participant relationship is primary and essential</li> </ul>						
Notes:						
<p><b>Advocacy:</b> PNs are advocates that work in favor of their participants providing assistance and promoting their interests with trusting relationships. PN take on different roles of advocacy such as: Supporter, Educator, Spokesperson, Mediator</p>						
Notes:						
<p><b>Interpersonal problem-solving</b></p> <ul style="list-style-type: none"> <li>• Acknowledge and establish hope</li> <li>• Define the problem</li> <li>• Brainstorm solutions</li> <li>• Select one solution and consider the costs and benefits</li> <li>• Plan out solution's implementation</li> <li>• Establish a time to implement and test the solution</li> <li>• Evaluate the solution's success/failure</li> </ul>						
Notes:						

Criteria	1	2	3	4	5	6
	Unsatisfactory level of skill	Marginal level of skill	Satisfactory level of skill	High level of skill	Superior level of skill	N/A
<p><b><u>Manage Aggression</u></b></p> <ul style="list-style-type: none"> <li>• Decrease frustration by acknowledging needs</li> <li>• Decrease demands by increasing realistic goals</li> <li>• Decrease confusion about rules or roles</li> <li>• Decrease stimulation (e.g. go to quiet space)</li> <li>• Promote positive social behaviors</li> <li>• Decrease rewards for aggressive behavior and identify incentives</li> <li>• Manage substance use</li> </ul>						
Notes:						
<p><b><u>Relapse Management (related to health goals of diet/exercise)</u></b></p> <ul style="list-style-type: none"> <li>• Identify signs and triggers</li> <li>• Implement relapse prevention plan</li> </ul>						
Notes:						
<p><b><u>Harm Reduction</u></b></p> <ul style="list-style-type: none"> <li>• Maximize health while reducing harm</li> <li>• Be nonjudgmental</li> <li>• Be informative</li> <li>• Be understanding</li> <li>• Keep participant engaged in services even during relapse</li> </ul>						
Notes:						

Criteria	1	2	3	4	5	6
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<p><b><u>Cultural Competency:</u></b> PN shows ability to understand the beliefs and values of others using the following principles:</p> <ul style="list-style-type: none"> <li>• Self- Awareness</li> <li>• Respect for Difference</li> <li>• Affirmation</li> <li>• Avoid Assumptions</li> <li>• Supportive Body Language</li> </ul>						
Notes:						
<p><b><u>Mental Health Crisis Management</u></b></p> <ul style="list-style-type: none"> <li>• Assess and respond to participants’ suicidal thoughts</li> <li>• Recognize and respond to acute psychosis, traumatic events, alcohol or drug overdose, and/or aggressive behaviors</li> </ul>						
Notes:						
<p><b><u>Physical Health Crisis Management</u></b></p> <ul style="list-style-type: none"> <li>• Recognizes and respond to signs of physical health crisis (heart attack, stroke, seizure, heat stroke, etc.)</li> </ul>						
Notes:						
<p><b><u>Trauma-informed Care</u></b></p> <ul style="list-style-type: none"> <li>• Recognizes signs of trauma</li> <li>• Normalizes trauma</li> <li>• Establishes safety and trust</li> <li>• Develops a partnership</li> <li>• Promotes empowerment</li> </ul>						
Notes:						



Criteria	1	2	3	4	5	6
	Unsatisfactory level of skill	Marginal level of skill	Satisfactory level of skill	High level of skill	Superior level of skill	N/A
<p><b><u>Finding Resources</u></b></p> <ul style="list-style-type: none"> <li>• Be familiar with participant’s past resources</li> <li>• Be familiar with your community area</li> <li>• Consolidate resources within your team</li> <li>• Connect and share with others</li> <li>• Connect with insurance resources</li> </ul>						
Notes:						
<p><b><u>Relationship Boundaries:</u></b> PN and participants strive to have a team member/team member relationship.</p> <ul style="list-style-type: none"> <li>• Ignore overtures</li> <li>• Educate clients on limits</li> <li>• Make assertive comments</li> </ul>						
Notes:						
<p><b><u>Self-disclosure:</u></b> (either about mental health or eating/activity behaviors)</p> <ul style="list-style-type: none"> <li>• Make it personal</li> <li>• Use concrete experience</li> <li>• Be truthful, don’t exaggerate</li> <li>• Empower yourself: Empower others</li> </ul>						
Notes:						
<p><b><u>Managing burnout</u></b></p> <ul style="list-style-type: none"> <li>• Recognizes signs of burnout (exhaustion, addiction, frustration, trouble focusing, etc.)</li> <li>• Uses strategies for dealing with burnout or emotional fatigue</li> </ul>						
Notes:						

Criteria	1	2	3	4	5	6
	Unsatisfactory level of skill	Marginal level of skill	Satisfactory level of skill	High level of skill	Superior level of skill	N/A
<p><b><u>Street Smarts</u></b></p> <ul style="list-style-type: none"> <li>• Awareness in community</li> <li>• Protection of valuables</li> <li>• Appropriate interaction with strangers</li> <li>• Use of public transportation</li> <li>• Appropriate response when victimized</li> </ul>						
Notes:						
<p><b><u>Office Etiquette</u></b></p> <ul style="list-style-type: none"> <li>• Proper dress/hygiene</li> <li>• Attendance and punctuality (follow protocols for calling in sick and taking time off)</li> <li>• Personal business to a minimum</li> <li>• Manage conflict appropriately</li> <li>• Responsive communication via email/phone/in-person</li> <li>• Maintenance of workspace</li> </ul>						
Notes:						
<p><b><u>Confidentially (HIPPA):</u></b></p> <ul style="list-style-type: none"> <li>• Keep participants information private and secure</li> <li>• Cannot use or share participants private health information without participant’s signed permission</li> <li>• Adhere to other agencies HIPPA policies</li> </ul>						
Notes:						

Criteria	1	2	3	4	5	6
	Unsatisfactory level of skill	Marginal level of skill	Satisfactory level of skill	High level of skill	Superior level of skill	N/A
<p><b><u>Mandated Reporter</u></b></p> <ul style="list-style-type: none"> <li>Appropriately reports possible abuse or neglect of child, elder, or person with disability</li> </ul>						
Notes:						
<p><b><u>Strategies working with health professionals</u></b></p> <ul style="list-style-type: none"> <li>Communicates with supervisor when need arises</li> <li>Respectful and professional communication with coworkers and public</li> </ul>						
Notes:						
<p><b><u>Time Management</u></b></p> <ul style="list-style-type: none"> <li>Uses a calendar or planner to structure day</li> <li>Arrives on time to participant appointments</li> <li>Is flexible in meeting the needs of participants</li> </ul>						
Notes:						

### Feedback Summary

**Areas of Strength**

Describe areas in which the peer navigator demonstrated skills.

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**Areas for Improvement**

Describe areas in which the peer navigator could further develop skills.

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