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¹Knowler WC, Barrett-Connor E, Fowler SE, Hamman RF, Lachin JM, et al. 2002. *N Engl J Med* 346: 393-403.

HOW TO USE THE *LIFESTYLE COACH*

FACILITATION GUIDE

Although the content differs from session to session, many common threads run through each session of the core curriculum. This section shows Lifestyle Coaches how to prepare for sessions and how to use the Facilitation Guide.

Preparation Checklist

The “Preparation Checklist” contains several lists: materials needed for each session, tasks to do before each session, tasks to do after participants arrive, and tasks to do after the session ends.

Materials needed for each session:

- Participant handouts for the relevant session.
- Food and Activity Trackers (one per participant).
 - Blank trackers for the week following the session.
 - Reviewed trackers from the previous session to return to participants.
- Balance-beam (preferred) or digital scale.
- Lifestyle Coach’s Log
- Blackboard, whiteboard, or flip chart and the appropriate writing utensils.

For some sessions, the following are also needed:

- Food models to demonstrate portion size and fat content.
- Empty food packages showing nutrition information.
- Measuring cups and spoons.
- Restaurant menus.

Tasks to be done before each session:

- Choose a private place to weigh participants.
- Have your Lifestyle Coach’s Log ready for weigh-ins.
- Set up the room as described on page 8.
- Have name tents or tags prepared before Session 1.

Tasks to be done as participants arrive:

- Weigh each participant privately.
- Give each participant a set of handouts to insert into the Participant Notebook.
- Have participants record their weight and physical activity on the “How Am I Doing?” charts in their Participant Notebooks.
- Distribute “Food and Activity Trackers” for the coming week.
- Except when noted, collect the previous week’s “Food and Activity Tracker” from each participant (some sessions call for the participants to refer to their tracker during the session).
- Return to participants the “Food and Activity Trackers” (with notes from the Lifestyle Coach) that were collected at the last session.

Tasks to be done after each session:

- Write notes about the session on the “Notes and Homework” page at the end of the guide for each session.
- Review each participant’s “Food and Activity Tracker.” Comment on successes and, when necessary, recommend changes.

Lifestyle Coach Brief

The Lifestyle Coach Facilitation Guide also provides a “**Lifestyle Coach Brief**,” which includes learning objectives for the session, an overview of the session, and a brief description of each part of the session.

Learning Objectives

These objectives tell the Lifestyle Coach what the participants should be able to do or discuss by the end of the session.

Session Overview

The session overview is a brief summary of the topics to be covered during the session and the amount of time allotted for each topic.

Session Parts

All sessions are in several parts. For most sessions (except Session 1, which has mostly introductory material), the sessions are structured as follows:

Part 1: Weekly Progress and Review (10 minutes):

This section is the same for each session. Participants are weighed privately and then asked to take their seats in the room. The Lifestyle Coach leads a brief review of the information covered during the previous session and then discusses participants' successes, challenges, and questions since the group last met.

The Lifestyle Coach also follows up on the previous week's "To Do Next Week" list by asking questions such as "were you able to follow your action plan for last week?" "What did you learn by following the plan?"

Parts 2 and 3 (40–50 minutes)

The Lifestyle Coach explains the session content, leads discussions on the topic, asks questions to probe the participants' thoughts, beliefs, and feelings about the topic and how they will put what they learn into practice. The time allotted for each topic depends on its complexity and the number of activities to be done during the session.

Part 4: Wrap Up and To-Do List (10 minutes)

This final part is the same for most sessions. The Lifestyle Coach summarizes what was covered during the session and explains the tasks assigned for participants to accomplish before the next session.

The tasks assigned to participants are written on a "To Do Next Week" handout. Participants do these tasks between sessions. The tasks call on participants to apply the lessons learned during the session, to practice using the tools given to them during the session, and to test their own ideas and solutions to challenging situations related to food or activity that occur between sessions.

Key Messages

Before closing each session, the Lifestyle Coach summarizes the key messages from the session. These messages should be reinforced periodically throughout the program.

Session Presentation

Also provided are step-by-step talking points for each session: these points include the new material to present to the participants, topics to discuss, questions to ask, activities to conduct, and suggestions to offer.

Lifestyle Coaches should not simply read the text as written. Rather, they should use the text to prepare for each session and to ensure that all important points are discussed, that all participants' questions are answered satisfactorily, and that participants have a chance to practice the recommended strategies for overcoming challenges. Lifestyle Coaches should follow the sequence of activities in the guide (i.e., cover all the material in the order it is presented in the guide). At the same time, Lifestyle Coaches should assess the participants' backgrounds and interests and tailor their language, examples, questions, suggestions, and recommendations accordingly.

Notes on Format

New material to be presented to participants is introduced with “**Present**”: for example,

Present: Today we are going to talk about physical activity and its importance to a healthy lifestyle.

Discussion questions are introduced with “**Ask**”: for example,

Ask: Were you able to make the active lifestyle choices you planned?

Discussion questions are followed by “**Open Responses**,” which indicates that the Lifestyle Coach wants to hear whatever participants have to say on the question.

Icons

Notice that a different icon represents each directive.

Participant handouts are introduced with “ **Refer**”: for example,

 **Refer** participants to the “What Makes You Eat?” handout in the Participant Notebook.

Participant activities are introduced by “ **Activity**”: for example,

 **Activity**

Think of one problem food cue that you will get rid of before next week and how you will do so.

Write down the problem and what you will do to get rid of it.

Some activities require looking at participant handouts; some are group-based; and others require individual attention.

Notes to Lifestyle Coach

Throughout the guide are notes to the Lifestyle Coach. These are asides from the text to be presented to the participants. They provide information that the Lifestyle Coach should know but that participants do not need to know. Sometimes they suggest how to handle certain participants or situations.

These notes are in separate green boxes with this icon. 

Notes and Homework

As soon as possible after each session, the Lifestyle Coach should use the “Notes and Homework” page to write notes about the session. The notes should include comments on what worked, what needs to be done differently for the next session, which participants need follow-up, what information or ideas the Lifestyle Coach needs to research, and general concerns or issues that need to be addressed.

Below are examples of the type of notes the Lifestyle Coach should make:

- Research local walking trails and maps to provide to participants next session.
- The discussion on likes and dislikes of physical activity turned out very negative. We need a more effective way to lead into the discussion on physical activity. In future sessions, it may make sense to focus first on the positive, or use the group discussion to troubleshoot a few of the negative associations.
- Carla will not be able to attend the session after next. Bring an extra “Food and Activity Tracker” for her next session.

Setting up the Room

The ideal room setup for sessions is tables or desks in a circle or semi-circle. Participants should be able to see and engage each other and the Lifestyle Coach, so rows or long narrow tables are generally not well suited. The Lifestyle Coach may stand or sit during the session, depending on preference.

The Lifestyle Coach should always be the first to arrive in order to arrange the seating, get materials and supplies ready, put up the flip chart or white board, and make sure all equipment (especially the scale) is present and working properly. Another reason for Lifestyle Coaches to arrive first is so they can greet participants as they arrive. By arriving early, Lifestyle Coaches can break the ice, introduce participants to each other, and begin to build relationships. Relationship building is especially important during the early sessions of the program.

Keeping on Schedule

Keeping to the time allotted for each part of the session is especially important to ensure that all the material is covered within 1 hour. Without arriving early to prepare and organize, Lifestyle Coaches cannot cover everything within 1 hour. Being early, prepared, and organized helps to build a positive rapport with participants, models accountability for the participants, and demonstrates respect for other people's time. Keeping on schedule also minimizes the burden on participants who need to keep on schedule because of child care or other activities.

Not only should Lifestyle Coaches arrive early, they should ask participants to do the same so weigh-ins can be completed before the 1 hour for the session begins. If participants arrive late, the Lifestyle Coach may ask them to stay after the session for their weigh-in.

Stay on time!

Data Collection

Lifestyle Coaches record each participant's weight at every session. These weekly weights also serve as an attendance record for participants. After physical activity is introduced during Session 5, Lifestyle Coaches should also record the number of minutes of physical activity each participant completed during the previous week. All data should be recorded on the Lifestyle Coach's Log and submitted to the Centers for Disease Control (CDC) per recognition requirements.

Make-Up Sessions

If a participant is unable to attend a session, the Lifestyle Coach should schedule a time outside of class to make up the session one-on-one (or in a small group if several participants did not attend a session). As usual, each participant's weight should be recorded and the handouts provided. The Lifestyle Coach and participant should discuss the material that was covered in the missed session. It may not be necessary to allocate an entire hour for the make-up session; often a 15–30 minute meeting is sufficient, which for convenience may be held before or after the following session.

Guidelines for Tailoring Sessions to the Group

When preparing for and presenting the session material, the Lifestyle Coach should tailor certain elements to the group's background, learning style, and interests. This will primarily involve incorporating examples that are relevant to a participant's ethnicity, financial means, and preferences.

The Lifestyle Coach should feel free to replace any of the examples given on the participant worksheets with other, more relevant examples. If group members do not generally eat foods such as potato chips or bologna, the Lifestyle Coach can use different foods suggested by participants. Similarly, the Lifestyle Coach may use supplementary educational aids if such materials can be used in a way that will enhance learning and not draw attention or time away from the curriculum. Keep in mind that a great deal of information is being presented during the 16 core sessions, so do not overwhelm participants with additional information and handouts. Even more importantly, too much information may eclipse the key concepts of the lifestyle change program. Below are some examples of appropriate ways to tailor or add supplementary materials to a session:

- Use food models or examples that are in line with the culture and preferences of the group.
- Provide walking maps of the areas where participants live.
- Organize a recipe-swap to which participants bring copies of their favorite low-fat recipe to share with others.

The examples above support the content of the lifestyle change program, do not need excessive time, and may increase the relevance and interest for participants.

Below are examples of what *not to do*. They would take time away from the many basic concepts to be presented and may not be relevant for all participants.

- Do *not* have a hypnotist come to a session on motivation.
- Do *not* decide against holding a session on the basis that participants do not seem to need it.
- Do *not* have a cooking demonstration on low-fat vegetarian cooking.