



## Self-Management During COVID-19 and Beyond

### Guidance #10

Updated June 7, 2021

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- **Please note that SMRC has a new address:** P.O. Box 219, Aptos, CA 95001 USA
  - **This guidance is an addendum to the previous guidance.**
  - **There are updates about website, programs, training, and manuals**
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- The following Tool Kits and Phone Scripts are now available: CDSMP English and Spanish, Diabetes English and Spanish, Pain English. Tool Kits can be ordered by contacting Emily at Bull Publishing: Emily Sewell [emily@bullpub.com](mailto:emily@bullpub.com)
- Phone scripts for the Tool Kits may be requested by emailing [manuals@selfmanagementresource.com](mailto:manuals@selfmanagementresource.com)  
**Your organization's licensing contact must request the scripts.** Please be sure to tell us which scripts and which language you are requesting.
- We are ending update training for 2020 CDSMP in July. Remember that we **now expect everyone to be using the 2020 CDSMP**. This includes using the 2020 edition of *Living a Healthy Life with Chronic Conditions*.
- The updated book, *Tomando control de su salud, 5<sup>th</sup> Edition*, is shipping from Bull Publishing. The updated Tomando program is now more similar to the 2020 version of CDSMP; therefore, for those who are bilingual Master Trainers and Leaders already updated in the 2020 CDSMP, there will not be the usual type of update training, but only a short orientation to go over the minor differences in the manuals. For those who have Tomando-only leaders, update training will begin in August. Please watch the website for orientation and training dates. **Everyone who takes the orientation must have first completed the update for the 2020 CDSMP** and be an active Tomando facilitator. **Please note that we are not planning 2020 CDSMP updates after July.**
- We will have an updated English Chronic Pain Self-Management Program by fall or maybe a bit sooner along with an updated *Living a Healthy Life with Chronic Pain*. **The book can be [preordered now](#).** **The updated program cannot be given without the new book.** The Spanish program will follow, but probably not before the end of the year or early 2022. An update training will be necessary to use the revised CPSMP. We will also update the Pain Tool Kit.

- There is no major update to Diabetes as this was done a couple of years ago. We are now making some minor script changes, however, especially in the menu planning activities due to changes in the food guides in the 2020 book, as well as incorporating new ADA guidelines. We are also replacing the Positive Thinking activity with the updated Communication with Ourselves activity from the 2020 CDSMP. As soon as the manuals are available, we will let you know.
- **Use of Tool Kits:** It has come to our attention that some of you are requesting virtual tool kit materials to use in ways for which they were not designed. Please do not do that. Tool kits can **ONLY** be used with print material and with the conference phone calls, not using the virtual platform mode. Tool kits may **never** be used in any virtual form. If you want to do the program virtually, then do the virtual workshops. Tool kits are for 3-5 participants.
- **Hybrid Workshops:** **SMRC does not allow hybrid workshops.** We offer you 3 different delivery modes: in person, tool kits with phone calls, and virtual. No mixing and matching please.

## Participant Virtual Workshops

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- Participant virtual workshops should be 8-12 people, but we will allow a minimum of 6. Less than 8 could negatively affect the group process/interaction.
- All participants must come from geographic areas served by your licensed agency, or in the case of umbrella licenses, those agencies named on your license.
- You may have up to two participants in each workshop from outside your “territory” but cannot charge for these people except for materials.

## Virtual Leader Training

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- SMRC will continue to offer virtual leader trainings (both English and Spanish) as demand requires. We have also now updated the *2020 CDSMP Master Trainer’s Manual* to offer virtual Leader training. If you wish to offer virtual Leader training but are missing a Master Trainer, let SMRC know, and we will try to find one for you. If you only have a couple of people who need Leader training or have a couple of spots (no more than two) in your Leader training, let Linda know and she will try to do matching.  
[linda@selfmanagementresource.com](mailto:linda@selfmanagementresource.com)
- We will continue to offer virtual certification trainings for **active** Master Trainers about once a month. We will post the details to the list serves and the website training calendar as these become available. Master trainers may not offer Leader training virtually unless they have received this training (the virtual certification webinar) from SMRC online. To attend

you must have served as a Leader for at least one virtual SMRC workshop. (Tool Kit + Phone workshops do not count.)

- For the very few of you who attended master training in the past 12 months but have not facilitated a workshop, you must complete two virtual workshops before you take the MT virtual certification webinar and submit your certification form to SMRC.
- Once you have taken the certification webinar, you can train new Leaders, cross-train and update active Leaders virtually.

### **What does virtual Leader training look like?**

- The training is 7 weeks. Week one is Session 0. Weeks 2-7 have two 2.5-hour sessions a week.
- The first session each week is a regular participant workshop, and the second session is all the “hats on” activities such as questions, review of activities, skills practice, scenarios, and practice teaches.
- **Leader trainings are limited to 12 people.** There is a *Master Trainer’s Manual* for vCDSMP Leader training which you will be given as part of the virtual certification webinar. (We do not have virtual manuals for all of our other programs but if you look at the virtual CDSMP manual you will be able to see how virtual training differs from in-person and can adapt the manuals to do new Leader training in the other programs. You should find it very easy to switch from in- person to online, virtual training.

### **Who can we train?**

- New Leaders who will facilitate the virtual workshop for your organization.
- If you have an umbrella license, Leaders for any organization named on your license.

### **Can we train people from other organizations?**

- You may have no more than **two people** from other organizations in any one training.
- You are responsible for finding out if they come from actively licensed organizations. (Ask to see their current license).
- If you charge more than \$75, you must notify SMRC and remit 25% of the fee to SMRC.
- If another organization asks you to train for them, as in the past, contact SMRC. **Do not make any commitment to train without contacting SRMC first.**  
[training@selfmanagementresource.com](mailto:training@selfmanagementresource.com)

## Master Training for vCDSMP

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### Existing Active Master Trainers

1. Facilitate one virtual workshop.
2. Take the SMRC MT virtual certification webinar.
3. You are good to go!

### New Master Trainers who are current active Leaders

1. Must have facilitated at least two workshops (of any SMRC Program), one of which must be virtual. One of these workshops must have been in the past year.
2. Must attend a 3-session virtual master training from SMRC.
3. Submit their Master Trainer certification application to SMRC.

### New Master Trainers (have never been trained)

Potential Master Trainers must:

1. Attend a virtual Leader training.
2. Facilitate 2 workshops (virtually and/or in-person).
3. **Attend a 3-session virtual master training coordinated through SMRC. We are proud to welcome our first 24 virtually trained Master Trainers.**
4. Submit their Master Trainer certification application to SMRC.
5. Then they may train Leaders virtually.

### Future Master Training

**NEW**

For some time, we have been concerned about the quality of the skills for some Master Trainers. In addition, many people were trained but never completed the 2 required workshops, or those that completed the workshops often never conducted a Leader training or did so too long after their initial training. Therefore, we are rethinking how to provide Master Training and piloting a new format for Master Training.

- **Starting in January 2022, all new Master Trainers will first have to attend either an in-person or virtual Leader training and complete two workshops before they can attend master training.** The master training will have two formats: 1) online (Zoom) training consisting of three 3-hour sessions, or 2) a two day in-person training. The in-person training has not yet been developed but will be available by the end of the year.
- **Until January 2022, you may continue offering the 4.5-day master training, COVID permitting. After the end of this year all new Master Trainers must first be Leaders who**

**have facilitated two workshops, either in-person or virtually, and will then take a 2-day in-person or 3 session virtual Master Training. This Master Training will be the same for all programs as the focus is totally on training skills and not program-specific content.**

### **Existing T-Trainers**

SMRC will be using some current T-Trainers to help with Leader and Master Trainer trainings (yes you will get paid, but you are not going to get rich). Once you have met the requirements for existing MTs above and then have done a virtual Leader training, let Virginia know if you are interested. [virginia@selfmanagementresource.com](mailto:virginia@selfmanagementresource.com)

**We need more T-Trainers to help us with virtual programs. In the future, T-Trainers will be able to conduct the 2-day in-person Master Trainings using the new format.**

### **Recruitment**

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- We know that one of the best ways to recruit for this or any other virtual class is to send emails directly to potential participants with links. If you have access to such an email list from senior centers, churches, service clubs, health care organizations, villages, use them. If you want suggestions or help, let Kate know. [kate@selfmanagementresource.com](mailto:kate@selfmanagementresource.com)
- It has recently come to our attention that there are very few weekend workshops. This is the time that seniors and others have less to do and had traditionally been a great time to offer workshops. Think about times you have not tried before, such as, Saturday mornings or Sunday afternoons. Think about recruiting new Leaders who are willing and able to lead a workshop during these times. Remember that one of the problems in filling workshops is that they are often scheduled to accommodate staff or Leaders, not the participants.

### **Building Better Caregivers: Help to build the evidence**

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If you serve a rural area anywhere in the United States or know caregivers living in rural areas, the University of California San Francisco is conducting a study of our existing internet-based Building Better Caregivers program. This study is for adults caring for someone with dementia (thinking problems). It is free. The VA has nationally used the program for several years. For information or to sign up for the study, go to <https://caregiverproject.ucsf.edu/>

**Reminder:** Licensed organizations can also do BBC in person or virtually, as well as other SMRC programs. Cross-training is available. If interested, contact SMRC.

[licensing@selfmanagementresource.com](mailto:licensing@selfmanagementresource.com)

## Coming!

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- ! **Coming soon — A new updated website!** We had a major setback when both our development server and the backup were destroyed in a fire. Launching our new site is later than we had hoped, but it really is right around the corner now! It will look a lot like the current website but underneath it will be able to do lots of tricks that will make life much easier for all of us. For starters, you will be able to set a new password for yourself when you forget yours, and you will be able to download manuals and slides from the trainer or licensee portal. As we get this new website up and running there will be a learning curve for both SMRC and you. You will get a personal email to the address we have in our database when it is up. We will also announce on the list serves.
- ! **Ongoing Updates** — Did you know that there is a resources webpage that is updated as needed? This valuable resource is available to anyone and hosted by Bull Publishing, who publishes our books. There are books, websites, links to videos, etc. – Lots of good information! Check it out: <https://www.bullpub.com/resources>
- ! **Upcoming Trainings** — We have scheduled several additional Leader trainings and master trainings and will soon start scheduling orientations for the new Tomando workshop. Keep watching the training calendar under Training on the website's menu for times, dates, and costs.

## SMRC Programs Delivery Modes and Languages

Workshop	In-person	Remote/ virtual	Tool Kit	Tool Kit plus phone calls	Internet via Canary Peers	Internet via Vively	Spanish	Other Languages
Chronic Disease Self- Management (CDSMP)	✓	✓	✓	✓	✓	✓	✓ Except Canary Internet	Arabic, Chinese, Creole, Danish, Finnish, French Canadian, Hindi, Hmong, Italian, Japanese, Korean, Maori, Portuguese, Russian, Samoan, Singapore, Tongan, Vietnamese (Virtual and in person)
Workplace CDSMP	✓	✓		✓ Use CDSMP Tool Kit			✓ Use Spanish CDSMP Tool Kit	
Diabetes Self-Management (DSMP)	✓	✓	✓	✓			✓	Chinese, Korean
Chronic Pain Self- Management (CPSMP)	✓	✓	✓	✓			✓ Except Tool Kit	French Canadian
Positive Self-Management (PSMP)	✓	✓					✓	
Cancer Thriving and Surviving (CTS)	✓	✓					✓	
Building Better Caregivers (BBC)	✓	✓			✓		✓ Except Internet	