Self-Management During COVID-19 and Beyond

Guidance #11

Updated December 23, 2021

➢ **This guidance is an addendum to the previous guidances.**

➢ **There are important updates about website, programs, training, and manuals**

NEW: **The following is new information.**

- **New 2022 Chronic Pain Program**.   Books, Tool Kits, Telephone Scripts, Virtual and In-Person Leader's Manuals, and Virtual Master Trainer, Update and Cross-Training Manuals will be available January 2022, but you must first take 2022 update training. Look on the website for training dates. Master Trainers or Leaders can take SMRC update training. Preference will be given to Master Trainers who can then provide update training for Leaders. We expect everyone to be converted to the new program and materials by June 2022. Sorry, but the old program cannot be used with the new materials and the updated program REQUIRES the 2021 book.   We expect to have Leader's Manuals in Spanish in less than a year.

- **Tomando control de us salud updates** are ongoing.   We expect everyone to be using the updated Tomando program and materials by March 2022.

- **Everyone should now be using the 2020 CDSMP updated program and Tool Kits.** We will not be providing any further Master Trainer or Leader updates.   Those Master Trainers not updated will need to take a 2020 CDSMP Leader training before they can continue facilitating the CDSMP. Leaders may receive virtual or in-person update training from Master Trainers who have been updated in the 2020 CDSMP.

- We do not plan on updating any other workshops or materials in the near future and will always give you lots of advanced warning.

Master Training New Policy

Going forward **all Master Training will be conducted through SMRC.**   To become a Master Trainer, one must first be an active Leader who has lead at least two participant workshops (virtually or in-person) for any of our programs. Telephone workshops do not count.

Master Training is three, 3-hour sessions online. Look at the SMRC training calendar for future dates and to register.

If you are an active T-Trainer and would like to conduct Master Training for SMRC (with pay), please contact Ginger virginia@selfmanagementresource.com

Licensing New Fees

We will be increasing all our licensing fees by about 10%. This is the first time we have increased fees for our most basic license which will now be $550 for three years. **The increase for Umbrella licenses will go into effect as of January 1, 2022 and for single organization licenses starting March 1, 2022.**

We wish that this was not necessary but we cannot continue to provide our services without an increase. Please read the following about our new website for a look into the future.

Website

After two years of promises and setbacks our new website is here! It's the same URL as always: https://selfmanagementresource.com. Lots of new services have been developed.

➡ The first thing you will notice is that you can reset your password without emailing SMRC!

➡ Trainers can download their training manuals, slides, and other materials directly from your member portal, as well as your certification form and past training completion certificates.

➡ The person named on your organization's license can download Leader's manuals, workshop slides, and tool kit scripts directly from the portal.

➡ **There is a program locator so the public can find a workshop near them.** However, you must help us keep this updated. The only information we have about many organizations is the person and address that applied for the license.

To be useful to the public, the locator must allow the person looking for a workshop to contact someone who knows about programs being offered in their area. The locator will only give information for licensed organizations and organizations officially covered by an umbrella license. This does not include sites where you offer workshops unless it is also the licensed organization.

To check and/or update the information about your organization on the locator, the license contact person must log in to the member portal on our website. You will first be sent to your profile page, where you can update and add any missing information. This information can be updated any time in the future that you need.

Check out our locator: https://selfmanagementresource.com/license-locator/

➡ **If you need help with the new website or find glitches write to Diana at** diana@selfmanagementresource.com

Old Stuff with Some Updates

- The following **Tool Kits and Phone Scripts** are now available: CDSMP English and Spanish, Diabetes English and Spanish, Chronic Pain English. Tool Kits can be ordered by contacting Emily at Bull Publishing: Emily Sewell emily@bullpub.com

  Phone scripts for the Tool Kits are downloadable from our website. **Only your organization's licensing contact may download scripts from the member portal.**

- The updated book, *Tomando control de su salud, 5th edition* (2021), is shipping from Bull Publishing.

- The updated 2021 Tomando program is completed and both update and cross-training are now available on our training calendar.

  The 2021 Tomando is more like the 2020 version of CDSMP; therefore, for those who are bilingual Master Trainers and Leaders already updated in the 2020 CDSMP, there is a shorter version of update training offered, which goes over the minor differences in the manuals. **Everyone who takes the short Tomando update must have first completed the update for the 2020 CDSMP** and be an active Tomando facilitator.

  Tomando-only Leaders (not CDSMP Leaders) must take the longer version of the Tomando update training.

- There is no major update to DSMP as this was done a couple of years ago. There are minor changes to the manuals (and phone script), 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 Communicating with Ourselves activity from the 2020 CDSMP.

  DSMP Leader's and Master Trainer's manuals are now available for both in-person and virtual workshops/trainings. Soon we will also have the virtual DSMP Cross-Training manual ready. When this is ready it will be available through your portal on the new website.

  The most recent DSMP manuals are downloadable from our website portal.

- **Use of Tool Kits**: It has come to our attention that some of you are requesting 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 in 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:** <u>SMRC does not allow hybrid workshops</u>. We offer 3 different delivery modes: in-person, virtual, and tool kits with phone calls. No mixing and matching, please. We have given permission to a couple of organizations to experiment with having the Leaders in one place and the participants all gathered as a group in another place. Once this pilot is finished later this year, we will let the rest of you know about this new format. **FOR NOW, NO HYBRID WORKSHOPS!**

Participant Virtual Workshops

- 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

- SMRC will continue to offer virtual Leader trainings (both English and Spanish) as demand requires. We have the 2020 CDSMP Master Trainer's Manual for 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

- Master trainers who were originally trained in-person may not offer Leader training virtually unless they have received this additional 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.)

- Once you have taken the certification webinar, you can train new Leaders, cross-train and update active Leaders virtually.

- We will continue to offer virtual certification trainings about once every 2-3 months into the new year, and then only by request. We will post the details to the list serves and the website training calendar as these become available.

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 are Master Trainer's manuals for virtual CDSMP and DSMP Leader training. 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 in-person and/or virtual workshops 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).   You can also see all current licensed organizations on the new locator on our website: https://selfmanagementresource.com/license-locator/
- 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.**

Leader Training Requirements

Existing Active Master Trainers

1. Facilitate one virtual workshop.
2. Take the SMRC Master Trainer virtual certification webinar.
3. Have taken the update training if you are training Leaders for CDSMP, CPSMP or Tomando
4. 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 or in-person Leader training.
2. Facilitate 2 workshops (virtually and/or in-person).
3. Be able to use Zoom or similar platform and have a computer that will allow them to be on screen for the full master training. (No mobile phones or tablets)
4. **Attend a 3-session virtual Master Training coordinated through SMRC.**
5. Submit their Master Trainer certification application to SMRC.
6. Then they may train Leaders virtually.

<u>**Existing T-Trainers**</u>

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

Recruitment

- 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

- 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

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

Coming!

! **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, Tomando and CPSMP updates and cross-trainings. 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	English only right now
Positive Self-Management (PSMP)	✓	✓					✓	
Cancer Thriving and Surviving (CTS)	✓	✓					✓	
Building Better Caregivers (BBC)	✓	✓			✓		✓ Except Internet	