



APPENDIX C

Process Monitoring and Evaluation Tools

FACILITATOR FIDELITY/PROCESS FORMS

When to Use: At the end of each training session

Administered By: Facilitator

Completed By: Facilitator

Instructions:

- ▶ **Do not distribute this instrument to the opinion leaders.** The *d-up!* Facilitator Fidelity/Process Forms are for the training facilitators. These evaluation instruments ask for feedback on the ways you implemented each segment within each of the four training sessions.
- ▶ **Complete all sections.** There is a section for each segment conducted during each of the sessions, which provides an opportunity for you to give feedback on each of these segments. For each program segment, indicate whether you *taught* the segment *as suggested*, *taught* the segment *with changes*, or *did not teach* the segment.
- ▶ **Complete the form promptly.** Complete the form right after the session so that your experiences are fresh in your mind.
- ▶ **Provide as much feedback as possible.** The more feedback you provide, the more helpful these evaluation instruments will be in future implementations of the intervention. Use the session segment sections to explain any changes as well as any recommendations you have. Comments and suggestions concerning the training content, structure, and clarity of the materials are particularly helpful and should be shared with your program coordinator.

d-up! FACILITATOR FIDELITY/PROCESS FORM

SESSION 1: WHY DO WE NEED TO DO THIS?

FACILITATOR INSTRUCTIONS:
Please complete this form after the training session.

Session Date: ____ / ____ / ____

Location of Session: _____

Wave Number: _____

Facilitators' Names:

1. _____

2. _____

Start Time: _____ am/pm

End Time: _____ am/pm

Total Number of Participating Opinion Leaders: _____

OPINION LEADERS' DEMOGRAPHICS
Indicate number of each demographic (e.g., 14 males, 2 females)

<p>Gender: <input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Transgender: Male to Female <input type="checkbox"/> Transgender: Female to Male</p>	<p>Ethnicity: <input type="checkbox"/> Hispanic or Latino <input type="checkbox"/> Not Hispanic or Latino <input type="checkbox"/> Don't Know</p>
<p>Race: <input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Asian <input type="checkbox"/> Black or African American <input type="checkbox"/> Native Hawaiian or Pacific Islander <input type="checkbox"/> White <input type="checkbox"/> Don't Know</p>	<p>Age: <input type="checkbox"/> 12 or Below <input type="checkbox"/> 13–18 Years <input type="checkbox"/> 19–24 Years <input type="checkbox"/> 25–34 Years <input type="checkbox"/> 35–44 Years <input type="checkbox"/> 45 Years and Over <input type="checkbox"/> Don't Know</p>

Purpose of Session 1:

1. Explain the essential role that opinion leaders play in HIV/AIDS prevention.
2. Provide opinion leaders with information that will help them understand and appreciate the value of the risk reduction norms, strategies, and behaviors they will endorse.
3. Introduce the impact that sociocultural factors have on high HIV rates among black men who have sex with men (MSM).
4. Provide basic information on HIV/AIDS.
5. Provide basic information on the relationship of HIV infection or transmission risk and sexual and drug use behaviors.

I. WELCOME

Discuss the following: <ul style="list-style-type: none"> • HIV/AIDS data and trends in the African American community • <i>d-up!</i>'s focus on changing the environment by altering group norms about unprotected sex • The unique role that trainees can play as opinion leaders. 	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 10 minutes Actual: _____ minutes

II. ACTIVITY—ICEBREAKER: TRUTH OR FICTION?

<ul style="list-style-type: none"> • Engage opinion leaders in an icebreaker activity. • Debrief the activity; relate it to the common tendency to leap to conclusions about others on the basis of how they look or talk. 	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 25 minutes Actual: _____ minutes

III. OPINION LEADER TRAINING OVERVIEW

Provide an overview of the following: <ul style="list-style-type: none"> • Training format • Training logistics • Training expectations 	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 15 minutes Actual: _____ minutes

IV. GROUND RULES AND PARKING LOT

<ul style="list-style-type: none"> • Collectively discuss and generate ground rules. • Introduce the Parking Lot concept. 	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 15 minutes Actual: _____ minutes

V. WHY *d-up!* IS IMPORTANT AND HOW IT WORKS

<ul style="list-style-type: none"> • Review key HIV data, with a focus on black MSM. • Facilitate discussion on sociocultural factors that contribute to HIV among black MSM. • Explain how <i>d-up!</i> targets social norms to promote safer sex behaviors. • Introduce the diffusion of innovation concept as it relates to <i>d-up!</i>'s strategy. 	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 30 minutes Actual: _____ minutes

VI. THE BASICS: HIV/AIDS 101

- Explain the HIV and AIDS acronyms.
- Review how HIV is and is not transmitted (i.e., how the virus may enter the body).
- Distinguish between HIV and AIDS.
- Explain how opinion leaders will use this information in conversations.

This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 15 minutes Actual: _____ minutes

VII. UNDERSTANDING LEVELS OF BEHAVIORAL RISK

- Introduce the concept of behavioral risk (not necessarily in those terms).
- Facilitate the behavioral thermometer activity on levels of risk.
- Facilitate discussion on the relationship between levels of risk and sociocultural factors that contribute to high rates of HIV among black MSM.

This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 15 minutes Actual: _____ minutes

VIII. RISK REDUCTION STRATEGIES

<ul style="list-style-type: none"> • Identify strategies that reduce the risk of HIV infection and transmission. • Discuss risk reduction strategies. 	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 15 minutes Actual: _____ minutes

IX. HIV TESTING OVERVIEW

<ul style="list-style-type: none"> • Explain HIV testing processes. • Distinguish between HIV infection and detection. • Provide HIV testing information. 	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 5 minutes Actual: _____ minutes

X. HIV TREATMENT OVERVIEW

<ul style="list-style-type: none"> • Review HIV treatment methods • Provide HIV treatment options information 	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 5 minutes Actual: _____ minutes

Which handouts and activity sheets were most and least useful?

What challenges did you encounter with this session?

Additional observations and feedback:

d-up! FACILITATOR FIDELITY/PROCESS FORM

SESSION 2: CHANGING NORMS THROUGH COMMUNICATION

FACILITATOR INSTRUCTIONS:
Please complete this form after the training session.

Session Date: ____ / ____ / ____

Location of Session: _____

Wave Number: _____

Facilitators' Names:

1. _____

2. _____

Start Time: _____ am/pm

End Time: _____ am/pm

Total Number of Participating Opinion Leaders: _____

OPINION LEADERS' DEMOGRAPHICS
Indicate number of each demographic (e.g., 14 males, 2 females)

<p>Gender:</p> <p><input type="checkbox"/> Male</p> <p><input type="checkbox"/> Female</p> <p><input type="checkbox"/> Transgender: Male to Female</p> <p><input type="checkbox"/> Transgender: Female to Male</p>	<p>Ethnicity:</p> <p><input type="checkbox"/> Hispanic or Latino</p> <p><input type="checkbox"/> Not Hispanic or Latino</p> <p><input type="checkbox"/> Don't Know</p>
<p>Race:</p> <p><input type="checkbox"/> American Indian or Alaska Native</p> <p><input type="checkbox"/> Asian</p> <p><input type="checkbox"/> Black or African American</p> <p><input type="checkbox"/> Native Hawaiian or Pacific Islander</p> <p><input type="checkbox"/> White</p> <p><input type="checkbox"/> Don't Know</p>	<p>Age:</p> <p><input type="checkbox"/> 12 or Below</p> <p><input type="checkbox"/> 13–18 Years</p> <p><input type="checkbox"/> 19–24 Years</p> <p><input type="checkbox"/> 25–34 Years</p> <p><input type="checkbox"/> 35–44 Years</p> <p><input type="checkbox"/> 45 Years and Over</p> <p><input type="checkbox"/> Don't Know</p>

Purpose of Session 2:

1. Describe the misconceptions about HIV and infected persons.
2. Describe the relationships between social norms and behaviors.
3. Describe the elements of effective risk reduction messages.
4. Describe how opinion leaders can influence the perception of social norms among their friends and acquaintances.

I. WELCOME AND SESSION 1 REVIEW

• Engage opinion leaders in the Rebound activity.	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 15 minutes Actual: _____ minutes

II. MYTHS AND MISCONCEPTIONS

• Review and discuss common HIV myths and misconceptions. • Engage opinion leaders in the Air Balls activity. • Distribute and discuss the Common Myths handout and fact sheet.	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 20 minutes Actual: _____ minutes

III. CASUAL TRANSMISSION OF HIV

<ul style="list-style-type: none"> • Generate and discuss common myths about HIV transmission. 	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 15 minutes Actual: _____ minutes

IV. USE OF SOCIAL NORMS TO CHANGE BEHAVIOR

<ul style="list-style-type: none"> • Discuss the role that social norms play in reducing HIV infections. • Discuss the role of opinion leaders in establishing social norms that support safer sex practices. 	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 25 minutes Actual: _____ minutes

V. ELEMENTS OF AN EFFECTIVE RISK REDUCTION MESSAGE

<ul style="list-style-type: none"> • Describe key elements of a risk reduction message. • Engage opinion leaders in the activity <u>You Can Do What With a Condom?</u> 	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 45 minutes Actual: _____ minutes

VI. IDENTIFICATION OF CONVERSATION PRACTICE OPPORTUNITIES

• Help opinion leaders to identify practice opportunities.	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 5 minutes Actual: _____ minutes

Which handouts and activity sheets were most and least useful?

What challenges did you encounter with this session?

Additional observations and feedback:

d-up! FACILITATOR FIDELITY/PROCESS FORM

SESSION 3: PRACTICING RISK REDUCTION CONVERSATIONS

FACILITATOR INSTRUCTIONS:
Please complete this form after the training session.

Session Date: ____ / ____ / ____

Location of Session: _____

Wave Number: _____

Facilitators' Names:

1. _____

2. _____

Start Time: _____ am/pm

End Time: _____ am/pm

Total Number of Participating Opinion Leaders: _____

OPINION LEADERS' DEMOGRAPHICS
Indicate number of each demographic (e.g., 14 males, 2 females)

<p>Gender: <input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Transgender: Male to Female <input type="checkbox"/> Transgender: Female to Male</p>	<p>Ethnicity: <input type="checkbox"/> Hispanic or Latino <input type="checkbox"/> Not Hispanic or Latino <input type="checkbox"/> Don't Know</p>
<p>Race: <input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Asian <input type="checkbox"/> Black or African American <input type="checkbox"/> Native Hawaiian or Pacific Islander <input type="checkbox"/> White <input type="checkbox"/> Don't Know</p>	<p>Age: <input type="checkbox"/> 12 or Below <input type="checkbox"/> 13–18 Years <input type="checkbox"/> 19–24 Years <input type="checkbox"/> 25–34 Years <input type="checkbox"/> 35–44 Years <input type="checkbox"/> 45 Years and Over <input type="checkbox"/> Don't Know</p>

Purpose of Session 3:

1. Provide opinion leaders with the opportunity to observe modeled conversations.
2. Provide each opinion leader with an opportunity to practice conversations and get feedback on strengths and weaknesses.
3. Help opinion leaders plan for extending their conversation practice in the real world.
4. Show opinion leaders how the *d-up!* logo can be used as a conversation starter.

I. INTRODUCTION AND REVIEW

• Review elements of an effective risk reduction message.	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 10 minutes Actual: _____ minutes

II. GET THE MESSAGE OUT: RISK REDUCTION CONVERSATIONS

• Model how to conduct risk reduction conversations using both Demonstration Scenarios. • Discuss Practice Scenario 1 as a large group. • Engage opinion leaders in role-plays based on scenarios (in small groups). • Facilitate additional role-plays with the large group. • Discuss and debrief.	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 90 minutes Actual: _____ minutes

III. PLANNING RISK REDUCTION CONVERSATIONS

<ul style="list-style-type: none"> • Review the conversation contact forms. • Engage opinion leaders in the activity Planning Conversations. • Guide opinion leaders in their planning and preparation for risk reduction conversations. 	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 20 minutes Actual: _____ minutes

IV. MAKING IT REAL: USING *d-up!* LOGO MATERIALS AND RECRUITING OTHERS

<ul style="list-style-type: none"> • Present the <i>d-up!</i> logo and explain how to employ the logo as a conversation starter. • Encourage opinion leaders to wear items with the <i>d-up!</i> logo to start risk reduction conversations. • Encourage opinion leaders to bring two friends to Session 4. 	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 10 minutes Actual: _____ minutes

Which handouts and activity sheets were most and least useful?

What challenges did you encounter with this session?

Additional observations and feedback:

d-up! FACILITATOR FIDELITY/PROCESS FORM

SESSION 4: CONTINUING RISK REDUCTION CONVERSATIONS AND INSPIRING MAINTENANCE

FACILITATOR INSTRUCTIONS:
Please complete this form after the training session.

Session Date: ____ / ____ / ____

Location of Session: _____

Wave Number: _____

Facilitators' Names:

1. _____

2. _____

Start Time: _____ am/pm

End Time: _____ am/pm

Total Number of Participating Opinion Leaders: _____

OPINION LEADERS' DEMOGRAPHICS <i>Indicate number of each demographic (e.g., 14 males, 2 females)</i>	
Gender: <input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Transgender: Male to Female <input type="checkbox"/> Transgender: Female to Male	Ethnicity: <input type="checkbox"/> Hispanic or Latino <input type="checkbox"/> Not Hispanic or Latino <input type="checkbox"/> Don't Know
Race: <input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Asian <input type="checkbox"/> Black or African American <input type="checkbox"/> Native Hawaiian or Pacific Islander <input type="checkbox"/> White <input type="checkbox"/> Don't Know	Age: <input type="checkbox"/> 12 or Below <input type="checkbox"/> 13–18 Years <input type="checkbox"/> 19–24 Years <input type="checkbox"/> 25–34 Years <input type="checkbox"/> 35–44 Years <input type="checkbox"/> 45 Years and Over <input type="checkbox"/> Don't Know

Purpose of Session 4:

1. Introduce the invited friends to *d-up!*.
2. Facilitate discussions on conversation experience.
3. Review HIV/AIDS behavioral risk factors.
4. Review the goals of the intervention and encourage the continuation of risk reduction conversations.

I. WELCOME AND INTRODUCTION

• Facilitate introductions. • Introduce the role of opinion leaders in reducing HIV risk in the community.	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 10 minutes Actual: _____ minutes

II. REVIEW THE RISK REDUCTION CONVERSATION EXPERIENCE

• Discuss opinion leaders' successes, use of logo materials, and challenges.	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 30 minutes Actual: _____ minutes

III. MOVING FORWARD WITH CONVERSATIONS

<ul style="list-style-type: none"> • Review strategies for risk reduction conversations. • Provide additional pointers as needed. 	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 25 minutes Actual: _____ minutes

IV. REVISIT HIV/AIDS 101

<ul style="list-style-type: none"> • Engage opinion leaders in the activity HIV Remix. • Reiterate the importance of having accurate information about HIV transmission. 	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 15 minutes Actual: _____ minutes

V. REVISIT THE LEVELS OF BEHAVIORAL RISK

<ul style="list-style-type: none"> • Brainstorm risk behaviors and the level of risk associated with each one. • Discuss behavioral risk factors. • Discuss messages that opinion leaders can integrate into conversations when sociocultural issues arise. 	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 30 minutes Actual: _____ minutes

VI. MAINTAINING THE MOMENTUM

<ul style="list-style-type: none"> • Explain the importance of opinion leaders maintaining contact and providing support with each other. • Brainstorm monthly activities and schedules. 	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 15 minutes Actual: _____ minutes

VII. CLOSING AND TRAINING REVIEW

<ul style="list-style-type: none"> • Summarize the <i>d-up!</i> opinion leader training experience. • Acknowledge, thank, and encourage the opinion leaders. • Address lingering issues. • Wrap up the opinion leader training. 	
This segment was: <input type="checkbox"/> Conducted as suggested <input type="checkbox"/> Conducted with changes <input type="checkbox"/> Not conducted	Remarks (Describe reasons for modifying or not teaching the segment and any suggested changes/recommendations):
How long did this segment take?	Projected: 30 minutes Actual: _____ minutes

Which handouts and activity sheets were most and least useful?

What challenges did you encounter with this session?

Additional observations and feedback:

FACILITATOR OBSERVATION FORM

When to Use: At least once during every opinion leader training session wave

Administered By: Program coordinator

Completed By: Program coordinator

Instructions: When conducting the observation, it is important to focus specifically on the facilitators' interactions with the participants and their nonverbal behavior. The observer should use active seeing and listening skills, paying particular attention to any important details. Completing this form will help you (1) determine whether a facilitator is delivering the opinion leader training with fidelity to the training protocols and (2) document the quality of the facilitation and management of the session's activities.

Be sure that the staff person completing the observation form includes the facilitator's name, the observer's name, date, session number, length of session, and location. The observer also should provide feedback on the facilitator's strengths, areas of improvement, and the observer's next steps for communicating the feedback to the appropriate staff persons.

***d-up!* OPINION LEADER TRAINING**

Facilitator Observation Form

Date: ___ / ___ / ___ Facilitator name: _____

Session number: _____ Length of session: _____

Location: _____ Observer name: _____

Instructions: Please observe the session facilitator and the facilitator’s interactions with session participants. Please circle the number that best represents your response to the questions.

1—Not Very Well 2—Not Well 3—Well 4—Very Well NA—Not Applicable

How well did the facilitator:					
1. Encourage group participation?	1	2	3	4	NA
2. Respond to the group (i.e., address questions)?	1	2	3	4	NA
3. Redirect the group?	1	2	3	4	NA
4. Manage the affect of the group (deal with stress)?	1	2	3	4	NA
5. Control the group’s behavior?	1	2	3	4	NA
6. Draw quiet people out?	1	2	3	4	NA
7. Deal with crises?	1	2	3	4	NA
8. Stay on time for each activity?	1	2	3	4	NA
9. Empathize with participants?	1	2	3	4	NA
10. Maintain neutral judgment?	1	2	3	4	NA
11. Maintain a degree of professionalism?	1	2	3	4	NA
12. Conduct the appropriate demonstrations?	1	2	3	4	NA
13. Follow the session curriculum?	1	2	3	4	NA
14. Engage the group in role-playing activities?	1	2	3	4	NA
15. Provide positive reinforcement?	1	2	3	4	NA
16. Provide corrective feedback?	1	2	3	4	NA
17. Manage all materials (i.e., props and handouts)?	1	2	3	4	NA
18. Demonstrate respect and appreciation for diversity (e.g., culture, race, gender)?	1	2	3	4	NA

Facilitator strengths:

Areas to be improved:

Action plan/next steps:

OPINION LEADER TRAINING SESSION FEEDBACK FORM

When to Use: After each training session during the implementation phase

Administered By: Facilitator

Completed By: Opinion leader

Instructions: Distribute the form to opinion leaders at the end of each training session. Let them know that they do not need to put their names on this form and that their answers will not exclude them from becoming opinion leaders. Have either a person, a box, or an envelope placed near the exit to collect the completed forms.

***d-up!* OPINION LEADER TRAINING**

Session Feedback Form

Instructions: We would appreciate you taking a few minutes to answer the following questions about this session. Please answer the questions as truthfully as possible. There are no right or wrong answers. Your answers will help us understand how we can improve these sessions for others in the future. Thank you.

Date: ____ / ____ / ____

Please rate your feelings about each of the following statements by checking the appropriate box. Also, please provide any comments or suggestions you have to improve future sessions.

Statement	Strongly Disagree	Disagree	Agree	Strongly Agree
The purpose of today's session was clear.				
The session was well organized.				
The session was engaging.				
The session's materials were easy to understand.				
The session's materials were useful.				
The session helped me become better prepared as an opinion leader.				
The facilitators used clear language.				
The facilitators gave all group members a chance to contribute and ask questions.				
The facilitators understood the subject matter.				
The facilitators were respectful.				
The facilitators were comfortable talking about sensitive topics.				
The session's environment was comfortable.				

1. The most useful parts of this session were:

2. Something I would change to make this session better would be:

3. What in this session will help you most in your role as an opinion leader?

Thank you for your feedback!

OPINION LEADER CONVERSATION TRACKING FORM

When to Use: After each risk reduction conversation an opinion leader has with a friend or acquaintance during the implementation phase

Administered By: Opinion leader

Completed By: Opinion leader

Instructions: This form is a tool for opinion leaders to quickly record the demographic characteristics and summaries of the risk reduction conversations. Once information is collected and provided to you, you will need to compile it in a database or spreadsheet in order to track the number of risk reduction conversations occurring in each friendship group.

You will need to provide clear instructions to your opinion leaders on how they should complete this form. They should complete a form soon after having a conversation, but not in the presence of the person with whom they spoke. While at least half of the conversations should be with black MSM, the opinion leaders also should never directly ask if the person is a black man who has sex with men. They should only answer questions on the basis of their own knowledge. Finally, provide instructions to your opinion leaders about how, when, and where they should turn in their forms.

OPINION LEADER CONVERSATION TRACKING FORM

Instructions: Use this form to record information about each risk reduction conversation you have with your friends and acquaintances. You should complete this form soon after you have had a conversation. Please try to write down information for each column below. NOTE: Do not directly ask your friend or acquaintance if they have sex with other men. Answer this question on the basis of your knowledge of that person. However, at least half of your conversations should be with black MSM.

Your first name: _____

First Name	Is This Person a Black Man Who Has Sex With Other Men?	Where Did You Have This Conversation?	Summary of Conversation (What Did You Talk About? Were There Any Barriers?)	Does This Person Want to Be an Opinion Leader? (If So, Provide Contact Information.)
	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know			<input type="checkbox"/> Yes <input type="checkbox"/> No Contact information:
	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know			<input type="checkbox"/> Yes <input type="checkbox"/> No Contact information:

First Name	Is This Person a Black Man Who Has Sex With Other Men?	Where Did You Have This Conversation?	Summary of Conversation (What Did You Talk About? Were There Any Barriers?)	Does This Person Want to Be an Opinion Leader? (If So, Provide Contact Information.)
	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know			<input type="checkbox"/> Yes <input type="checkbox"/> No Contact information:
	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know			<input type="checkbox"/> Yes <input type="checkbox"/> No Contact information:
	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know			<input type="checkbox"/> Yes <input type="checkbox"/> No Contact information:
	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know			<input type="checkbox"/> Yes <input type="checkbox"/> No Contact information:

First Name	Is This Person a Black Man Who Has Sex With Other Men?	Where Did You Have This Conversation?	Summary of Conversation (What Did You Talk About? Were There Any Barriers?)	Does This Person Want to Be an Opinion Leader? (If So, Provide Contact Information.)
	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know			<input type="checkbox"/> Yes <input type="checkbox"/> No Contact information:
	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know			<input type="checkbox"/> Yes <input type="checkbox"/> No Contact information:
	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know			<input type="checkbox"/> Yes <input type="checkbox"/> No Contact information:
	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know			<input type="checkbox"/> Yes <input type="checkbox"/> No Contact information:

First Name	Is This Person a Black Man Who Has Sex With Other Men?	Where Did You Have This Conversation?	Summary of Conversation (What Did You Talk About? Were There Any Barriers?)	Does This Person Want to Be an Opinion Leader? (If So, Provide Contact Information.)
	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know			<input type="checkbox"/> Yes <input type="checkbox"/> No Contact information:
	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know			<input type="checkbox"/> Yes <input type="checkbox"/> No Contact information:
	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know			<input type="checkbox"/> Yes <input type="checkbox"/> No Contact information:
	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know			<input type="checkbox"/> Yes <input type="checkbox"/> No Contact information:

First Name	Is This Person a Black Man Who Has Sex With Other Men?	Where Did You Have This Conversation?	Summary of Conversation (What Did You Talk About? Were There Any Barriers?)	Does This Person Want to Be an Opinion Leader? (If So, Provide Contact Information.)
	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know			<input type="checkbox"/> Yes <input type="checkbox"/> No Contact information:
	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know			<input type="checkbox"/> Yes <input type="checkbox"/> No Contact information:
	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know			<input type="checkbox"/> Yes <input type="checkbox"/> No Contact information:
	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know			<input type="checkbox"/> Yes <input type="checkbox"/> No Contact information:

OPINION LEADER CONVERSATION TRACKING SUMMARY

When to Use: During the implementation phase, as opinion leaders turn in their Opinion Leader Conversation Tracking Forms. Refer to whenever new waves of opinion leaders are recruited.

Administered By: Program Coordinator

Completed By: Program Coordinator

Instructions: Use this summary form to compile information from each individual Opinion Leader Conversation Tracking Form. You can use this form to track and ensure that you have enough OLs from each friendship group engaging in the necessary number of risk reduction conversations. The form serves as a master map of OLs to ensure that no friendship group is over or under enrolled.

Remember that the goal of *d-up!* is to have 15% of the members of each friendship group in a social network serving as OLs. At least half of the OLs must be black MSM. If a person is an OL in more than one friendship group, you must ask the OL to choose or assign him or her to have risk reduction conversations with members from only one of the friendship groups. If an OL drops out before having the necessary number of conversations, you will need to recruit and train another OL from the same friendship group. If trained OLs are not recruiting enough of their friends to meet *d-up!* goals, project staff should recruit OLs from the under enrolled friendship groups.

OPINION LEADER CONVERSATION TRACKING SUMMARY

Social Network: _____ Target Social Venue: _____ Social Network Size: _____

Friendship Groups	Opinion Leader 1	Opinion Leader 2	Opinion Leader 3	Opinion Leader 4	Opinion Leader 5	Opinion Leader 6
Name of FG 1:	Name:	Name:	Name:	Name:	Name:	Name:
Size:	Date trained:	Date trained:	Date trained:	Date trained:	Date trained:	Date trained:
Number of OLs:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:
Name of FG 2:	Name:	Name:	Name:	Name:	Name:	Name:
Size:	Date trained:	Date trained:	Date trained:	Date trained:	Date trained:	Date trained:
Number of OLs:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:
Name of FG 3:	Name:	Name:	Name:	Name:	Name:	Name:
Size:	Date trained:	Date trained:	Date trained:	Date trained:	Date trained:	Date trained:
Number of OLs:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:

Friendship Groups	Opinion Leader 1	Opinion Leader 2	Opinion Leader 3	Opinion Leader 4	Opinion Leader 5	Opinion Leader 6
Name of FG 4:	Name:	Name:	Name:	Name:	Name:	Name:
Size:	Date trained:	Date trained:	Date trained:	Date trained:	Date trained:	Date trained:
Number of OLs:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:
Name of FG 5:	Name:	Name:	Name:	Name:	Name:	Name:
Size:	Date trained:	Date trained:	Date trained:	Date trained:	Date trained:	Date trained:
Number of OLs:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:
Name of FG 6:	Name:	Name:	Name:	Name:	Name:	Name:
Size:	Date trained:	Date trained:	Date trained:	Date trained:	Date trained:	Date trained:
Number of OLs:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:	A black MSM? # of reported conversations:

SPOT INTERVIEW GUIDE

When to Use: During the implementation and maintenance phases; after your intervention has ended (to monitor outcomes)

Administered By: Intervention staff

Completed By: Intervention staff

Instructions: Spot interviews can provide you with information on the attitudes, perceptions, beliefs, and behaviors of members of your target social network and whether or not they have changed. You can conduct interviews with people who are familiar with *d-up!*, such as your opinion leaders and/or gatekeepers, as well as members of your target population. You may conduct interviews at your opinion leader reunions, celebratory meetings for stakeholders, and at or outside of the target social venues. When conducting the interviews, you should do the following:

- ▶ Greet the participant. Introduce yourself if you have not had previous personal contact with him or her.
- ▶ Thank the participant (e.g., opinion leaders, gatekeepers/business owners) for taking the time to talk with you about *d-up!*. (Note: Spot interviews are usually quick interactions. If time allows, provide a brief overview of *d-up!* and why the interview is being conducted.)
- ▶ Observe demographic characteristics of the participant. Clarify information as necessary with him or her, asking only for information that cannot be determined from observation. Do not use a checklist with the individual.
- ▶ Use the questions provided below as a guide. Encourage respondents to express themselves as they choose. You also may need to revise them to meet your needs.
- ▶ Once you have finished your series of interviews, compile the information and identify common responses and themes that were mentioned across the interviews.

SPOT INTERVIEW GUIDE

General Information

Staff Name: _____ Staff ID: _____

Date of the interview: ____ / ____ / ____

Interview Site/Setting (specify): _____

Site/Setting Type

<input type="checkbox"/> Street/Hangout	<input type="checkbox"/> Bar/Club
<input type="checkbox"/> Business	<input type="checkbox"/> Residence
<input type="checkbox"/> Church/Religious Institution	<input type="checkbox"/> Community Event
<input type="checkbox"/> Agency	<input type="checkbox"/> <i>d-up!</i> Reunion
<input type="checkbox"/> Clinic/Health Care Facility	<input type="checkbox"/> Other

Demographic Information

Gender:

- Male
- Female
- Transgender: Male to Female
- Transgender: Female to Male
- Don't Know

Age:

- 12 or Below
- 13–18 Years
- 19–24 Years
- 25–34 Years
- 35–44 Years
- 45 Years and Over
- Don't Know
- Refused to Answer

Ethnicity:

- Hispanic or Latino
- Not Hispanic or Latino
- Don't Know
- Refused to Answer

Language Spoken During the Interview:

- English
- Spanish
- Other (*Specify:* _____)

Race: (*Check all that apply*)

- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian or Pacific Islander
- White
- Don't Know

Type of Respondent:

- Community Member
- Agency Representative
- Business Owner
- Clergy
- Health Department Representative
- Opinion Leader
- Other (*Specify:* _____)

Interview Questions

1. Do you feel that (*state name or describe your target network*) has a greater awareness of the risk factors for HIV and how to reduce their risk? If yes, how so? If no, why not?

2. How have attitudes, beliefs, and opinions about HIV risk reduction changed among members of the friendship group(s)?

3. What are the social norms (e.g., shared attitudes, beliefs, perceptions) that have influenced risk for HIV among members of the friendship group(s)? How have these social norms changed?

4. Do you think (*state name or describe your target network*) intends to engage in risk reduction activities, such as condom negotiation and consistent condom use?

5. Other notes:

REUNION MEETING ACTIVITY LOG

When to Use: After every reunion

Administered By: Intervention staff

Completed By: Intervention staff

Instructions: Complete this log following reunion meetings to record process data and to summarize opinion leaders' discussion and debriefing of their risk reduction conversations, including successes and lessons learned. Opinion leader referrals are also compiled in this log.

REUNION MEETING ACTIVITY LOG

Today's Date: ____ / ____ / ____
Location: _____
Start Time: ____ : ____ am/pm (<i>circle one</i>) End Time: ____ : ____ am/pm (<i>circle one</i>)
Staff Names (indicate person completing this form)
Name: _____ ID#: _____
Name: _____ ID#: _____
Name: _____ ID#: _____
Total Number of Participants: _____
Number of Opinion Leaders: _____
Number of Gatekeepers/Stakeholders: _____

I. Discussion Points

Instructions: Please indicate whether the following issues were talked about during this reunion meeting and summarize the key discussion points for each issue. Be as descriptive as possible, using the space provided below.

Barriers to holding risk reduction conversations with peers:

Risk reduction conversation success stories:

Alternative approaches for conversations that did not go well:

Suggestions for updating conversational elements:

Suggestions for developing new *d-up!* educational materials (conversation starters and posters):

Preliminary or current results regarding the impact of *d-up!* in the target social network:

II. Opinion Leader Referrals

Instructions: Please provide the names and contact numbers for the prospective opinion leaders referred by the current opinion leaders. Please also provide the name of the opinion leader making the referral.

	Nominated Opinion Leader	Contact Telephone Number	Nominated or Referred By	Friendship Groups
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

III. Participant Information

Instructions: To the extent possible, record the number of opinion leaders, community gatekeepers, and key stakeholders in attendance with each corresponding demographic characteristic.

1. Gender: <input type="checkbox"/> Female <input type="checkbox"/> Male <input type="checkbox"/> Transgender: Male to Female <input type="checkbox"/> Transgender: Female to Male <input type="checkbox"/> Don't Know	3. Ethnicity: <input type="checkbox"/> Hispanic/Latino <input type="checkbox"/> Not Hispanic/Latino <input type="checkbox"/> Don't Know
2. Race: <input type="checkbox"/> American Indian/Alaska Native <input type="checkbox"/> Asian <input type="checkbox"/> Black/African American <input type="checkbox"/> Native Hawaiian/Pacific Islander <input type="checkbox"/> White <input type="checkbox"/> More Than One Race <input type="checkbox"/> Don't Know	4. Age: <input type="checkbox"/> 12 or Below <input type="checkbox"/> 13–18 Years <input type="checkbox"/> 19–24 Years <input type="checkbox"/> 25–34 Years <input type="checkbox"/> 35–44 Years <input type="checkbox"/> 45 and Older <input type="checkbox"/> Don't Know

IV. Additional Notes

QUALITY ASSURANCE ASSESSMENT

When to Use: After you have trained at least one wave of opinion leaders

Administered By: Program coordinator

Completed By: Program coordinator

Instructions: Complete this assessment as a follow up to the *d-up!* intervention activities conducted. Look at the data collected during the pre-implementation, implementation, and maintenance phases during the period of review.

It is important for you to (1) determine whether your agency delivered *d-up!* with fidelity to its core elements and (2) identify any issues that should be addressed to ensure that the intervention is meeting the needs of the target social network. Below is a simple checklist you can use to assess the quality of the implementation of the intervention's core elements and activities.

QUALITY ASSURANCE ASSESSMENT

Program coordinator name: _____

Date: ____ / ____ / ____ Period of review: _____

Number of intervention cycles completed: _____

1. Was the intervention directed to an identifiable target population (*social network*) in well-defined community venues/contexts where the population's size could be estimated?
 Yes
 No—*If no, explain why:*

2. Were community discovery techniques used to identify friendship groups and to identify those persons who are most popular, well liked, and trusted in each friendship group (*opinion leaders*)?
 Yes
 No—*If no, explain why:*

3. Were 15% of the individuals in each friendship group from the target social network trained as opinion leaders?
 Yes
 No—*If no, explain why:*

4. During the opinion leader trainings, were opinion leaders taught skills for initiating risk reduction conversations with friends and acquaintances during everyday encounters?
 Yes
 No—*If no, explain why:*

5. **During the opinion leader trainings, were opinion leaders taught the characteristics of effective risk reduction messages?**
- Yes
 - No—*If no, explain why:*
6. **During the opinion leader trainings, did opinion leaders learn about social and cultural factors that put black men who have sex with men at risk for HIV and how to address these factors in their risk reduction conversations?**
- Yes
 - No—*If no, explain why:*
7. **During the opinion leader trainings, did groups of opinion leaders meet together weekly (over 4 weeks) in sessions that used instruction, facilitation modeling, and extensive role-playing exercises?**
- Yes
 - No—*If no, explain why:*
8. **During the opinion leader trainings, were the training groups small enough to provide extensive practice opportunities for all opinion leaders to develop their communication skills and conduct risk reduction conversations?**
- Yes
 - No—*If no, explain why:*
9. **During the opinion leader trainings, did opinion leaders set goals to engage in risk reduction conversations with friends and acquaintances after Session 3 and Session 4?**
- Yes
 - No—*If no, explain why:*

10. Were opinion leaders' conversation experiences reviewed, discussed, and reinforced at subsequent training and/or reunion sessions?

Yes

No—*If no, explain why:*

11. Did trained opinion leaders personally endorse the benefits of safer sex and recommend practical steps needed to implement change in conversations with their friends and acquaintances?

Yes

No—*If no, explain why:*

12. Were logo materials, symbols, or other devices used as conversation starters between opinion leaders and others?

Yes

No—*If no, explain why:*

13. Additional notes:

