Virtual Lifestyle Management
Lifestyle Coach Training

What is Virtual Lifestyle Management (VLM)?

The Virtual Lifestyle Management Program is an online translation of the lifestyle intervention developed for the Diabetes Prevention Program. It is designed for delivery in coordination with outpatient medical care, and teaches patients about healthy eating and physical activity patterns, along with tips as to how best fit them into their lives.

VLM participants work closely with a lifestyle coach, who should be skilled in behavioral intervention delivery. We recommend that coaches have completed the Group Lifestyle Balance training offered by the Diabetes Prevention Support Center, or the equivalent training. Coaches must be conscientious about delivering their advice in a timely manner, and alert for any signs of participant frustration, distress, or physical health issues that may influence appropriate dietary and physical activity goals.

The Diabetes Prevention Program

The Diabetes Prevention Program’s (DPP) lifestyle intervention was selected as the basis for the VLM program because it has several features that are common to successful programs lifestyle program: dietary and physical activity advice; frequent participant contact, particularly early in the intervention; and behavioral techniques to help people modify their established habits. Furthermore, it was tested with a large randomized, controlled trial, and found to promote clinically significant weight loss and a 58% reduction in Type 2 diabetes among adults at high risk for diabetes onset (New England Journal 2002; 346(6): 393-403). In addition, its relatively low-fat, low-calorie diet and moderate physical activity recommendations are appropriate for patients with a broad spectrum of cardiovascular risk.

For more information on the DPP Study, see the DPP Summary Fact Sheet: http://diabetes.niddk.nih.gov/dm/pubs/preventionprogram/index.htm

Key Principles of the Lifestyle Balance (DPP) Intervention

Clearly defined study goals: All participants receive a study goal for weight loss and physical activity at the start of the intervention. Later, calorie goals are added as well. From the beginning of the intervention, you should state these goals without equivocation and set high expectations for achieving and maintaining them, in order to improve the participants’ health.

Participant Self-Management: Each participant makes personal choices about how to achieve the goals. This allows for flexibility and reinforces the ability of the participants to shape and evaluate their own progress by self-monitoring, developing personal goals and action plans, and problem solving. Your role is to guide and support the participants in self-management.
Virtual Lifestyle Management
Lifestyle Coach Training

General Protocol for VLM Coaching

VLM coaches send two general types of coaching messages: (a) as-needed coaching notes; and (b) scheduled coaching notes.

Coaches often receive participant messages containing questions or seeking advice. Replies to these patient queries make up the “as needed” coaching notes, and should be sent within 2 business days of the patient query. They can be combined with scheduled coaching notes, if a scheduled note is due over the same time-frame.

Scheduled coaching notes should occur weekly for all participants upon enrollment in the program. After participants complete the initial 16 lessons of the curriculum, scheduled coaching note frequency should drop to every other week. The next few pages include an overview of the contents of scheduled coaching notes. To make best use of a coach’s time, scheduled notes should be interrupted if a participant becomes “inactive.”

The protocol for designating a participant as inactive is shown on the following page. In brief, if a participant does not log in for 14 consecutive days, then fails to respond to two generic coaching messages (e.g., “We notice that you have not logged in to VLM in the last XX days, and wanted to touch base and see if there is any way we could help you with your VLM program goals. Please give us a call at (XXX) XXX-XXXX”) and two phone calls requesting contact, a participant is considered “inactive.” This is an internal designation, and not intended to be disclosed to the participant, who is always welcome to resume participation in VLM. Inactive participants do not require any coaching notes, though they should be reviewed on a weekly basis, to determine if program activity has resumed. If an “inactive” participant logs back into the program, his/her status reverts to “active” and the normal coaching protocols are re-established (including the need to complete the protocol for designating a participant as inactive if program use should prove transient).

A coaching team should have access to people with expertise in nutrition, exercise physiology and behavioral medicine, as well as a physician. The coach should be a health professional with skill in making clinical decisions. The behavioral medicine specialist should provide oversight as needed to ensure that coaching practices adhere to the recommendations in this document. Coaches should monitor participants in a time-frame that is appropriate for their underlying health and safety concerns. The team’s physicians should contribute input on the appropriate monitoring interval.

Please note:
The contents of these training materials are meant as general guidelines. Specific advice must be tailored to the health and safety concerns of each individual participant.
Protocol for Determining Inactive Status

No login for ≥ 14 days

Coach sends “inactive message” and calls participant

No response after 7 days (21 days total)

Response: logs in or indicates desire to continue

Coach continues scheduled coaching notes

Response: does not want to continue at this time

Coach changes status to “inactive” and stops notes

Coach sends second “inactive message” and calls participant again

No response after 7 days (28 days total)
Virtual Lifestyle Management
Lifestyle Coach Training

Practical Tips for Lifestyle Coaching

_Drawn from the DPP coaching tips._

1. **Express support & acceptance** for the participants regardless of their progress toward their lifestyle goals.

2. **Look for success & build on it**, no matter how small or gradual.

3. **Maintain the highest of standards & expectations.** Do not lessen the program’s study goals to match what seems “realistic” or “do-able” for a participant. Instead, express ongoing confidence that the participant will be able to reach and maintain the study goals and then provide the utmost support in helping him/her address any barriers to that end. Expectations are often self-fulfilling. If expected to do poorly, participants are more likely to do poorly; if expected to do well, many will rise to the occasion.

4. **Do not assume that a barrier to the study goals exists** until it is evident (for example, that a participant who has a lower level of education will be unable to calculate fat grams when self-monitoring). Such assumptions are often based on hidden biases that may prove false (e.g., many interventionists have reported that less educated participants often do the most thorough self-monitoring).

5. **Involve the participant as much as possible** when barriers do become evident, through goal setting & problem solving. Use and convey an experimental approach--the evidence of a barrier is not a sign of failure on the part of the coach or the participant but rather is a valuable piece of information to be used to design and test a better experiment, together.

6. **Be the expert.** Be confident and firm when assigning the strategies for change presented in the intervention (such as self-monitoring of fat gram intake and physical activity). Stress that studies have shown these strategies to be highly successful for many people. However, be flexible about using other strategies as needed. Information and behavioral strategies are included in the intervention because of their likelihood of enhancing achievement and maintenance of the goals, not as ends in themselves.

7. **Tailor the intervention to participant lifestyle, learning style, and culture.** Many factors (e.g., ethnic heritage, socioeconomic status, marital status, and roles at work and at home) have an impact on the eating and activity behaviors of participants. Such factors may also influence the way you interact with participants. Therefore, remain open and sensitive to whatever factors may be important to each individual participant and at the same time, avoid stereotyping or making assumptions. The goal is to implement the intervention with awareness, consideration, and careful communication so that differences can be used to enhance the intervention rather than get in its way. Be careful to avoid interpreting a behavior within your own cultural context without asking. And remember that level of English literacy is not a sign of intelligence or a predictor of success with lifestyle change.
Scheduled Coaching Notes
In general, there are eight topics to consider in a scheduled coaching note. You may find the Coaching Review Sheet helpful in organizing your coaching notes (see Appendix 1).

1. Overall Progress: Is the participant losing more or less than 1 – 2 pounds per week? How close is the participant to his/her next weight goal? Do fat and calorie goals need to be adjusted?

2. Lesson completion status: Does the participant have a lesson due or overdue? What are the aspects of the lesson you think the participant will find most useful?

3. Action Plan and Worksheet Statements: Did the participant fill all of the blanks? Did he/she understand the questions? What are the strengths of their plan? What additional information might help him/her implement the plan?

4. Tracking Status: Did the participant enter a weight? Is he/she regularly tracking fat, calories, and physical activity, if appropriate?

5. Fat Consumption: Is the participant’s average fat consumption for the week at or below goal? How much variation is there throughout the week? Are high-fat days being balanced by low-fat days?

6. Calorie Consumption: Is the participant’s average calorie consumption for the week at or below goal? How much variation is there throughout the week? Are high-calorie days being balanced by low-calorie days?

7. Physical Activity Level: Is the participant at or above his/her physical activity goal? What types of activity has he/she been doing? How much variation is there throughout the week? Are low-activity days balanced with high-activity days?

8. Any Other Open Issues: Are there any pertinent issues on the “Daily Detail” section?

Keep an eye out for...
- Incorrect or skipped workbook entries
- Changes needed in fat, calorie or weight loss goals
- Weight or BMI dropping to a level consistent with “normal” range
- Participant comments in the “Daily Detail” pages
- Potential life stressors (travel, vacations, change in work or family situations, illness, weather) which may impact a participant’s eating and physical activity behavior.
Virtual Lifestyle Management
Lifestyle Coach Training

Tips for Writing Scheduled Coaching Notes

1. Focus on the most pertinent topics each week. There is no need to comment on all eight areas.

2. Find at least one area where the participant has been successful, and comment on it.

3. Keep your notes relatively brief. A good note could consist of just a few sentences. You will write another message the following week, so there will be time to cover other areas.

4. Contact the appropriate person immediately if you think there is an urgent health concern (see list of “Red Flags” below). For urgent matters, such as an acute medical concern, contact the health care professional identified for the participant. For less urgent matters, consider getting more information from the participant and discussing the situation with a supervisor.

5. Ask the participant questions if you feel you need more information on a topic. He or she can write back with the information, and you can address their response in a new message.

6. Reply to all separate participant inquiries within two business days. If a coaching note is due within this time frame, the two can be combined.

7. If you have limited resources for promoting participant adherence, consider following the “Protocol for Determining Inactive Status” for participants who are not logging in.

Red Flags: If any of the following occur, contact the appropriate person immediately.

- More than 2 lbs. per week of weight loss
- Medical concerns, including:
  - injuries or illness
  - chest pain, shortness of breath, or palpitations
  - evidence of possible problems with blood pressure or blood glucose (dizziness, hypoglycemia, weakness, fatigue)
- “All-or-nothing” thinking about eating or physical activity behavior, negative self-talk, comments about giving up or stopping the program
- Suicidal or homicidal ideation
- Signs of disordered eating, depression, difficulty coping with life stressors, or other mental health disorders that may require specialized treatment (e.g. over-compulsiveness regarding minute details of food or activity recording)
- Inadequate or excessive nutrient intake or physical activity level
- Sudden, large changes in nutrient intake or physical activity level
- Any other issue that raises concern for medical or psychological safety
### Virtual Lifestyle Management
#### Lifestyle Coach Training

## Appendix 1: Coaching Review Sheet

<table>
<thead>
<tr>
<th>Participant Code: _____________</th>
</tr>
</thead>
<tbody>
<tr>
<td>7% Weight Goal: _______ DPP Cal: _______ Fat: _____ Next Change: ___________</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Today’s Date: _______________</th>
<th>Last Coaching Note: _______________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Log-in: _____________</td>
<td>Last Lesson #:_____ Lesson Date: _______________</td>
</tr>
<tr>
<td>Tracking?</td>
<td>Action Plan/Workbook: ______________________</td>
</tr>
<tr>
<td>Y N Wt: ___________</td>
<td>_______________</td>
</tr>
<tr>
<td>Y N Fat: ___________</td>
<td>Other Issues/Concerns: ______________________</td>
</tr>
<tr>
<td>Y N Cal: ___________</td>
<td>_______________</td>
</tr>
<tr>
<td>Y N Act: ___________</td>
<td>_______________</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Today’s Date: _______________</th>
<th>Last Coaching Note: _______________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Log-in: _____________</td>
<td>Last Lesson #:_____ Lesson Date: _______________</td>
</tr>
<tr>
<td>Tracking?</td>
<td>Action Plan/Workbook: ______________________</td>
</tr>
<tr>
<td>Y N Wt: ___________</td>
<td>_______________</td>
</tr>
<tr>
<td>Y N Fat: ___________</td>
<td>Other Issues/Concerns: ______________________</td>
</tr>
<tr>
<td>Y N Cal: ___________</td>
<td>_______________</td>
</tr>
<tr>
<td>Y N Act: ___________</td>
<td>_______________</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Today’s Date: _______________</th>
<th>Last Coaching Note: _______________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Log-in: _____________</td>
<td>Last Lesson #:_____ Lesson Date: _______________</td>
</tr>
<tr>
<td>Tracking?</td>
<td>Action Plan/Workbook: ______________________</td>
</tr>
<tr>
<td>Y N Wt: ___________</td>
<td>_______________</td>
</tr>
<tr>
<td>Y N Fat: ___________</td>
<td>Other Issues/Concerns: ______________________</td>
</tr>
<tr>
<td>Y N Cal: ___________</td>
<td>_______________</td>
</tr>
<tr>
<td>Y N Act: ___________</td>
<td>_______________</td>
</tr>
</tbody>
</table>

© 2007 University of Pittsburgh. All rights reserved.
Appendix 2. Group Lifestyle Balance Training

Introduction
The Group Lifestyle Balance program is a modification of the highly successful Individual Intensive Lifestyle Intervention utilized in the Diabetes Prevention Program. It is important that those providing the Group Lifestyle Balance program have a solid knowledge of the background and rationale for a behavioral lifestyle change program in the prevention of diabetes and reduction of risk for cardiovascular disease.

The GLB two-day training workshop is designed to give the individual the information and tools necessary to successfully deliver the program. In addition, for those who have attended a training workshop, ongoing support from the Diabetes Prevention Support Center is available. This concept is based on the training and support model successfully carried out in the DPP.

Recommended Audience
The training workshop is designed for those health care professionals who plan to provide the Group Lifestyle Balance program for diabetes prevention and cardiovascular risk reduction either in the traditional leader-led setting or using the Group Lifestyle Balance DVD or CD.

Benefits of Attendance at Training Workshop
In addition to receiving specific training for provision the Group Lifestyle Balance program as a group leader or using the DVD or CD, the preventionist will receive the following benefits through attendance at a GLB training workshop:

- Inclusion in the DPSC Preventionist Network
  The DPSC Preventionist Network matches recognized preventionists with available positions in various settings throughout the region
- Addition to the DPSC List Serve
  The DPSC List Serve is a resource for those providing the Group Lifestyle Balance program for sharing ideas and addressing concerns with peers via the internet.
- On-going support and updates from the DPSC
- Opportunity for GLB training recognition

For more information on how to obtain Group Lifestyle Balance Training, please contact mkk3@pitt.edu