

**5-Step Method Training:  
Competency Assessment Form: Completion by the Trainers and the 5SM Accredited  
Trainer Assessor.**



**Please attach a) Summary of Participants Evaluation b) 5-Step Trainers Feedback Form.**

**Name of Trainer:**

**Training Date:**

**Name of Rater:**

**Completed Assessment Date:**

**Introduction:**

This training assessment form is for the trainee and the trainer assessor to complete. Please attach the summary of Participants Evaluation; and the 5-Step Trainers Feedback Form.

**Pass: Above 65% for Table 1 A & B (majority of scores are 3.5 and above) and**

As training may now be delivered by online platforms such as zoom/or hybrid training (eg use of online videos/other materials in 5SM website), some adaptations have been made below and these will need to be adapted and bespoke to the training course. You will need to work out what is feasible within your time constraints and if participants will do some learning by using the website outside of the training course. These can be agreed between the trainers and the 5-Step Accredited Trainer Assessor. If delivered in another language, then online translation facilities can be used.

**Overall, the trainer has to demonstrate three key skills:**

- 1. Adequate preparation for the course**
- 2. Training facilitation and feedback skills (either face to face or online)**
- 3. Ability to pass on knowledge about all aspects of the 5SM. This includes the Model, the 5 Steps, Counselling Skills and Accreditation**

Table 1

Scoring: 0 = No Evidence. 1 = Very Poor. 2 = Poor. 3 = Acceptable. 4 = Good. 5 = Excellent. Can use .5 scores as necessary e.g. 3.5

No	Training Outcome	Examples	Evidence of meeting criterion. If any criterion scores less than 5, give feedback on improvements.	Score
<b>A. General Training Skills</b>				
1.	<b>Preparation for course</b>	<ul style="list-style-type: none"> <li>• Training plan updated and timings agreed between trainers.</li> <li>• Use of training techniques agreed and tested out if utilising new techniques on zoom.</li> <li>• All administration checked with organisations.</li> <li>• Technical rehearsal as needed.</li> <li>• Agreed materials send out to participants.</li> </ul>		
2.	<b>Room or online training platform set up effectively and sessions well planned.</b>	<ul style="list-style-type: none"> <li>• Room/video conference set up so all equipment in right place and tested.</li> <li>• Adequate space for participants and their resources</li> <li>• Appropriate space for small group work (VC breakout rooms)</li> <li>• Facilitators can use technology appropriately (slides/video clips/screen shares etc...)</li> <li>• Resources correctly collated and referred to correctly – handouts and workbooks.</li> </ul>		
3.	<b>Presentation/ Facilitation skills</b>	<ul style="list-style-type: none"> <li>• Good communicator e.g., eye contact, body language, appropriate volume, tone, and pace.</li> <li>• Build rapport and audience put at ease.</li> <li>• Presenter is confident and knowledgeable and flexible.</li> <li>• Instructions for group exercises are clear.</li> <li>• Checked participants understand information.</li> <li>• All participants involved.</li> <li>• Facilitation/training techniques used to effectively deal with any participant's difficult behaviour.</li> <li>• Content follows the training plan and timings adhered to</li> <li>• Variety of techniques used to ensure that the group remains engaged, works well together, and stays on track (e.g., energisers, referring to group rules, reminding group of purpose of each section)</li> <li>• Presenters not talking too much and letting trainees express themselves.</li> <li>• Presenters work well together so are co- trainers/support each other.</li> <li>• At start/end of each day facilitate a review of previous learning</li> </ul>		

No	Training Outcome	Examples	Evidence of meeting criterion. If any criterion scores less than 5, give feedback on improvements.	Score
		<ul style="list-style-type: none"> <li>• Presenter's behaviour models 5- Step and general counselling skills eg summarising, reflecting, probing and questioning style, giving participants confidence and encouragement</li> </ul>		
4.	<b>Training Skills</b>	<ul style="list-style-type: none"> <li>• Clear objectives given for each section.</li> <li>• Objectives summarised with key points at end of each section.</li> <li>• Sessions are linked to underlying SSICS Model and 5SM</li> <li>• Answer audience questions, summarise what individuals/audience said.</li> <li>• Information on PowerPoint clear and enhanced through examples rather than just reading out.</li> <li>• Feedback given in clear way to improve participant's skills.</li> <li>• Evaluation from participants shows improved knowledge/confidence in skills.</li> </ul>		
5.	<b>Integrity of the Method</b>	<ul style="list-style-type: none"> <li>• Giving correct information</li> <li>• Slides are adhered to.</li> <li>• Genuineness, empathy, and unconditional positive regard reflected in facilitators manner towards material and participants.</li> <li>• Facilitators demonstrate understanding of substance use disorders and their impact on family members.</li> <li>• Impresses the importance to participants of the integrity of the method through the competency process</li> </ul>		
6.	<b>Section 11: Skills practices</b>	<ul style="list-style-type: none"> <li>• Ensure skills practice is undertaken appropriately, i.e participants understand the roles, and how to give/receive feedback regarding counselling skills and identified competency criteria.</li> <li>• Facilitate the observer giving appropriate feedback relevant to competency.</li> <li>• Provide relevant feedback to person in role of observer re their feedback.</li> <li>• Provide relevant feedback to the person in role of practitioner.</li> <li>• Ensure safety of the person in the role of FM</li> </ul>		
7.	<b>Section 1: Introductions, AFINet, Objectives, Timetable</b>	<ul style="list-style-type: none"> <li>• Provides warm welcome and facilitates introductions of all present</li> <li>• Introduces AFINet and resources on 5SM Website</li> <li>• Provides clear objectives of the training (i.e., understanding of and preparation for demonstrating competency in the method)</li> <li>• Clearly articulates the logistics of the training – times/materials/small group exercises/housekeeping and ground rules.</li> <li>• Introduce self, organisation and topic.</li> <li>• Timing of session is adequate /not rushed.</li> <li>• Clear objectives given.</li> <li>• Content is logical and flows properly from one topic to the next.</li> <li>• Session objectives summarised.</li> </ul>		
<b>All Total Score: x/35 (x%) x self-assessment: x/35 (x %).</b>				

No	Training Outcome	Examples	Evidence of meeting criterion. If any criterion scores less than 5, give feedback on improvements.	Score
<b>B: 5SM Competency Skills</b>				
8.	<b>Section 2: The Evidence Base</b>  <b>5SM SSICS Model, FMQe</b>	<ul style="list-style-type: none"> <li>• Describes each of the 5-Steps and what people say about 5SM.</li> <li>• Facilitates discussion of the impact on family of substance misuse/problem gambling.</li> <li>• Explains the evidence base.</li> <li>• Explains the SSICS Model.</li> <li>• Describes the research into its effectiveness including importance of the FMQ.</li> <li>• Describes the principles and development of competency framework</li> <li>• Review the session through interactive exercise or can use online quiz.</li> <li>• Highlights materials on 5SM website.</li> </ul>		
9.	<b>Section 3: The Competency Framework</b>	<ul style="list-style-type: none"> <li>• Explain the competency framework and why it is key.</li> <li>• Introduces Assessment Criteria – impresses upon participants the importance of using this.</li> <li>• Highlights materials on 5SM website.</li> </ul>		
10.	<b>Section 4: Counselling skills</b>	<ul style="list-style-type: none"> <li>• Discusses importance of counselling skills.</li> <li>• Explains evidence base.</li> <li>• Explains importance of this criteria for competency/integrity of the method.</li> <li>• Discuss importance of assessing risk and how to do this.</li> <li>• Highlights materials on 5SM website.</li> </ul>		
11.	<b>Section 5: Delivering Online, Preparation, FMQ and Starting the Session</b>	<ul style="list-style-type: none"> <li>• Discuss what differences here may be to delivering online and highlight 5SM resources- manual and website demonstrations.</li> <li>• Discussion of what to prepare prior to starting step 1 with FM.</li> <li>• Highlight the importance of setting the agenda</li> <li>• Explain the importance of FMQ, participants to practice and highlight 5SM website resources of how to do online..</li> <li>• Introduce how to use the competency framework to assess the competencies in the video</li> <li>• Watch video of Step (Beginning and Ending the Step) and discuss with participants the score they would give asking for evidence of why they give that score, and suggestions of improvements.</li> <li>• Participants to practice competency in small groups and focussed feedback provided.</li> <li>• Highlights materials on 5SM website.</li> </ul>		
12.	<b>Section 6:Step 1</b>	<ul style="list-style-type: none"> <li>• Explain the purpose of Step linked to the SSICS and highlight key tips.</li> <li>• Discussion/small group exercise on the impact on different FM's</li> <li>• Explain competency criteria.</li> </ul>		

No	Training Outcome	Examples	Evidence of meeting criterion. If any criterion scores less than 5, give feedback on improvements.	Score
		<ul style="list-style-type: none"> <li>• Explain the use of the Self-Help Handbook exercises</li> <li>• Explain the scoring of the assessment criteria – highlighting the importance of citing evidence for score (and suggestions for improved score).</li> <li>• Draw attention to examples of good practice and common problems utilising handouts as well as video clips.</li> <li>• Watch video of Step and discuss with participants the score they would give asking for evidence of why they give that score, and suggestions of improvements.</li> <li>• Highlights materials on 5SM website.</li> </ul>		
13.	<b>Section 7:Step 2</b>	<ul style="list-style-type: none"> <li>• Explain the purpose of Step linked to the SSICS and highlight key tips.</li> <li>• Discussion/small group exercise on what information FM might want.</li> <li>• Explain competency criteria.</li> <li>• Explain the use of the Self-Help Handbook exercises.</li> <li>• Explain the scoring of the assessment criteria – highlighting the importance of citing evidence for score (and suggestions for improved score).</li> <li>• Draw attention to examples of good practice and common problems utilising handouts as well as video clips.</li> <li>• Watch video of Step and discuss with participants the score they would give asking for evidence of why they give that score, and suggestions of improvements.</li> <li>• Highlights materials on 5SM website.</li> </ul>		
14.	<b>Section 8:Step 3</b>	<ul style="list-style-type: none"> <li>• Explain the purpose of Step linked to the SSICS and highlight key tips.</li> <li>• Introduce the Typology of coping, discuss it to ensure participants understand it (reiterate it comes from evidence base). Ensure they understand it. Demonstrate/discuss moving from TINA to TAAA.</li> <li>• Explain competency criteria.</li> <li>• Explain the use of the Self-Help Handbook exercises.</li> <li>• Explain the scoring of the assessment criteria – highlighting the importance of citing evidence for score (and suggestions for improved score).</li> <li>• Draw attention to examples of good practice and common problems utilising handouts as well as video clips.</li> <li>• Watch videos (2 of them) of Step and discuss with participants the score they would give asking for evidence of why they give that score, and suggestions of improvements.</li> <li>• Highlights materials on 5SM website.</li> </ul>		
15.	<b>Section 9: Step 4</b>	<ul style="list-style-type: none"> <li>• Explain the purpose of Step linked to the SSICS and highlight key tips.</li> <li>• Discussion/small group exercise re supportive/unsupportive behaviours</li> <li>• Demonstrate social support diagram</li> </ul>		

No	Training Outcome	Examples	Evidence of meeting criterion. If any criterion scores less than 5, give feedback on improvements.	Score
		<ul style="list-style-type: none"> <li>• Explain competency criteria.</li> <li>• Explain the use of the Self-Help Handbook exercises.</li> <li>• Explain the scoring of the assessment criteria – highlighting the importance of citing evidence for score (and suggestions for improved score).</li> <li>• Draw attention to examples of good practice and common problems utilising handouts as well as video clips.</li> <li>• Watch video of Step 4 and 4.5 and discuss with participants the score they would give asking for evidence of why they give that score, and suggestions of improvements.</li> <li>• Highlights materials on 5SM website especially how to do the support diagram online .</li> </ul>		
16.	<b>Section 10:Step 5</b>	<ul style="list-style-type: none"> <li>• Explain the purpose of Step linked to the SSICS and highlight key tips.</li> <li>• Explain competency criteria.</li> <li>• Explain the use of the Self-Help Handbook exercises.</li> <li>• Explain the scoring of the assessment criteria – highlighting the importance of citing evidence for score (and suggestions for improved score).</li> <li>• Draw attention to examples of good practice and common problems utilising handouts as well as video clips.</li> <li>• Highlights materials on 5SM website.</li> </ul>		
17.	<b>Section 11: Accreditation, Practice Issues, Group Work</b>	<ul style="list-style-type: none"> <li>• Discussion of safe practice.</li> <li>• Discussion of how to do the 5SM in groups.</li> <li>• Explain the process of accreditation.</li> <li>• Discuss logistics and expectations re time frames.</li> <li>• Use own experience to alleviate anxiety and uncertainty.</li> <li>• Highlights materials on 5SM website.</li> </ul>		
<b>Total Score: x/50 (x%) x self-assessment: x/50 (x %).</b>				

**Table 2: Overall Summary**

**Pass: Above 65% for Table 1 (majority of scores are 3.5 and above) and Attach Summary of Participants Evaluation; 5-Step Trainers Feedback Form.**

**SUMMARY: Overall Comments for Table, 1,2, and Evaluations and Feedback Form. State improvements and action plan as needed. (For the Assessor, comment on Trainer's self assessment).**

**Three key skills and comments on whether they were met:**

- 1. Adequate preparation for the course**
- 2. Training facilitation and feedback skills (either face to face or online)**
- 3. Ability to pass on knowledge about all aspects of the 5SM. This includes the Model, Counselling Skills, the 5-Steps and Accreditation**