

## Pure Edge Fidelity Observation Form Introduction and Guidelines

Pure Edge's fidelity effort is at the heart of our commitment to make all our programs the best they can be. Program fidelity helps us know how our programs are being implemented and enables their refining based on what is actually happening in classrooms. The goal of this document is to provide a framework and set of guidelines for our Fidelity Observation Form (FOF) which was initially developed for our flagship program, *Pure Power*<sup>1</sup>.

Pure Edge fidelity efforts are guided by the CORE process for measuring fidelity of implementation (Feagans-Gould, Dariotis, Greenberg and Mendelson, 2014). The CORE process entails four steps:

- Conceptualize Core Components
- Operationalize & Measure
- Run Analyses & Report/Review Findings
- Enhance & Refine

We incorporated the CORE process and fidelity form development into a curriculum revision cycle. Our FOF is based on an observation form created by Hagins and Rundle (2016). We clarified *Pure Power*'s core components (Step 1), operationalized them (Step 2), and then incorporated them into a refined version of the Hagins and Rundle observation form. The FOF shared in Appendix A and on our website reflects this process as well as *Pure Power*'s core components. It is capable of measuring the fidelity of any *Pure Power* lesson.

This document orients users to the Pure Edge FOF by providing an overview and set of guidelines to facilitate its valid and reliable use during classroom observations. The appendices that follow include the FOF (Appendix A) and a support document (Appendix B) that offers operational definitions and notes about each FOF item.

### **Fidelity Observation Form (FOF) Overview**

It is important to measure fidelity of implementation  
but its operationalization is difficult.  
(Kisa and Correnti, 2015, p. 439)

The FOF (Appendix A) is designed to focus on two overarching aspects of program fidelity, Structure and Process (Feagans-Gould et. Al., 2015). Page one of the form documents where the class is being taught and *what* is being taught in it, we refer to this structural fidelity. Page two of the form documents *how* the class is taught, we refer to this as process fidelity.

### Structural Fidelity (Page 1)

Structural Fidelity, or *what* is being taught, includes the physical and curricular elements of the program that students experience in a class. Structural Fidelity on the FOF includes four sections that examine the visual and behavioral support elements of the lesson, the physical classroom environment, the lesson being taught, the amount of time allocated to each part of the lesson and the number of times students are prompted to draw their attention to their breath or be mindful. A short description of each of these sections follows. For operational definitions and item notes see the support document in Appendix B.

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<sup>1</sup>*Pure Power* is a stand-alone health and wellness course designed to be delivered to students in 30 minutes sessions twice per week. To learn more visit [www.pureedgeinc.org/curriculum](http://www.pureedgeinc.org/curriculum)

Section 1: Routines and Procedures. The Routines and Procedures section of the FOF documents classroom operations, seeks evidence of preparation for class and asks about enter and exit routines. Displayed visual agendas and learning objectives are signs of instructor preparation and accepted as good teaching practices (Dean, Ross, Pitler & Stone, 2012). Enter and exit routines are critical to making transitions into and from the learning space. The entrance routine should lead to students being at their personal learning space or mat ready to engage in the lesson of the day. The exit routine should support students leaving *Pure Power* ready to fully engage their next learning activity.

Section 2: Environment. This Environment section of the FOF focuses on whether the space is conducive to *Pure Power's* teaching and learning activities. While it is flexible enough to deliver in classrooms, gymnasiums, libraries, courtyards and even outside, the teaching and learning space must be one that supports engagement in the class and not one fraught with distractions. Ideally the space is orderly, comfortable and minimizes environmental distractions such as noise, odors, or heavy traffic.

Section 3: Content Fidelity. The Content Fidelity section of the FOF examines whether the lesson being taught is drawn from the *Pure Power* curriculum. It seeks observable evidence that students experience a class session or lesson from our curriculum. The items in this section seek an introduction to the lesson of the day, how it connects to previous lessons and the degree to which the movement sequence and content were taught as written in the session plan.

Section 4: Time Allocation & Breath/Mindfulness Tracking. Time Allocation and Breath/Mindfulness Tracking collects the number of class minutes allocated to breath, movement, rest and instructional content by documenting the start and stop time of each. It also tracks instances where instructors prompt class attention toward breath and mindfulness. Time allocation can be challenging to document as elements of the class often have unclear transitions, toggle back and forth or are woven together. *Pure Edge* has implemented decision rules to govern time allocation in unclear situations such as when content instruction (e.g. mindful listening) is woven into the movement portion of a lesson. Those rules are detailed in Appendix B.

The FOF includes breath and mindfulness tickers to document the first fifteen instances where instructors cue the class toward breath or movement. Tracking breath and mindfulness cues allows us to document and report on two of our core components but both are challenging to operationally define. Breath cues can be oral as in “breathe in” or “exhale” or visual such as a raising of hands or expansion of a breathing ball. Mindfulness cues can be even more vague, particularly because they may be unique to each student and when a mindfulness cue is followed, it may have no externally observable features. We key in on signal words or phrases such as “notice” or invitations to awareness of thoughts, sensations or feelings.

## Process Fidelity (Page 2)

Process fidelity encompasses how students experience the lesson. It documents the way instructors interact with students, the way the lesson is delivered, whether breath and movement are connected throughout the session and whether the instructor speaks, dresses and acts in a manner fit for their school context. A short description of each Process Fidelity item follows. For operational definitions and item notes see the support document in Appendix B.

Item 1: Relationship. This item documents the degree to which the instructor's words and actions express openness to students. Key aspects of this indicator include engagement with students and attentiveness to how students are doing as they enter and throughout the class.

Item 2: Management. This item documents the degree to which the instructor demonstrates competence in classroom management. *Pure Power* calls for behaviors which are atypical in classroom settings such as movement in concert or group dialogue. These activities, when not effectively managed by a leader, can lead a classroom into disorder and undermine the student experience.

Item 3: Teaching Strategies. This item documents the degree to which instructors tailor their instruction to the group of students in each class. Instruction should reflect the developmental needs and learning styles of the students in the classroom. For example, a kindergarten class might make use of a song to teach a lesson, while a middle school class might have time for independent learning built in.

Item 4: Preparedness. This item documents the degree to which the instructor appears to know the lesson of the day. This includes the way she/he discusses the material, responds to student questions or draws on supports to improve engagement in or comprehension of the lesson. This indicator spans the content, breathe, move and rest portions of the class.

Item 5: Posture Instruction. This item documents the teaching of the postures or movement portion of the class. Many of the postures and/or sequences are complex. Maximized outcomes and participant safety during movement call for clear instructions and attention to detail of body placement. Instructor and student modeling of proper form can support quality instruction.

Item 6: Breath/Movement Connection. This item documents one of our core components as it focuses on the degree to which the instructor draws attention to and facilitates the connection between breath and movement throughout the lesson. We believe *Pure Power* and other programs like it offer benefits such as improved self-regulation and attentional capacity that are rooted in students developing a conscious awareness of the connection between breath and movement. This item aims to document the degree to which the instructor cues breath and movement synchronicity and conscious awareness throughout the length of class while the breath counter (Item 4.5) focuses on the number of times breath awareness is prompted.

Item 7: Appropriateness. This item documents the degree to which the instructor dresses, speaks and acts in ways that are appropriate within their teaching context. Though *Pure Power* draws upon yoga-based exercises it is not a yoga program and should not be referred as such. Additionally, instructors should not display or draw upon artifacts associated with yoga culture. This item also includes a focus on the inclusion of or unnecessary elaboration on topics that detract from lesson delivery. While “rabbit trails” in class are often the product of responding to student questions, effective responses are succinct, keep the lesson on topic, appropriate for the classroom setting, and avoid prioritizing personal experience over curricular content.

Item 8: Engagement. This item documents the degree to which students are participating in the class. Active participation “looks” different as class activities change. Sometimes engagement is easily observable such as during movement activities, while at other times it is less observable such as during rest when sleeping students resemble those in active rest. This item asks the observer for a general impression of the class as a whole, not a calculation.

Items nine and ten are coaching items to reference when working with individual instructors. Number nine asks “what worked” which provides an opportunity to document success or high points during the observation and number ten, “to consider,” provides the observer an opportunity to note suggestions.

## Working with the Fidelity Observation Form (FOF)

### Observation purpose

The FOF is designed to measure the fidelity of *Pure Power* implementation and student experience. We share it here in the interest of promoting program quality and research rigor, not as an instructor performance tool.

### FOF structure

The FOF includes 55 items designed to document the features of a *Pure Power* class. The form can be administered as a paper document or in electronic formats. These guidelines align to the paper format included in Appendix A and on the *Pure Edge* website.

The FOF is designed as a two page document divided into sections. Sections are numbered sequentially with individual items numbered within each section. This structure supports referencing items using the first letter of each section and item numbers such that item five of section one, Routines and Procedures, would be referenced as item R5 which prompts observers to look for exit routines.

FOF is designed to be reported on multiple levels. The psychometric properties of reporting at various levels are beyond the scope of this document, they are addressed in our white paper on fidelity which can be accessed on our website.

### Fidelity scoring

Fidelity scores from FOF observations are reported at the structure fidelity, time allocation and process fidelity levels. FOF scoring as well as instrument reliability and validity are explored more deeply in our white paper on fidelity which can be accessed on our website.

### Response sets

There are three different response types on the form: fill in the blank, multiple choice and a counter. Most sections contain multiple choice or Likert scale responses. Those that are not multiple choice include the notes and time allocation fields which are fill in the blank and the counters which track the first fifteen breath and mindfulness cues of each class.

### Observation frequency

The *Pure Edge* program team has set a target to observe each *Pure Power* instructor a minimum of once per month with more frequent observations in cases where additional support or accountability are called for.

The two appendices that follow are the FOF and its support document, which mirrors the design of the protocol except it holds notes instead of data collection fields. There is much left to know about the mindfulness and social emotional development work in which we as a field are engaged. Our hope in sharing these documents is that they contribute to the available resources within the field sparking fruitful discussion and progress.

## References

Dean, C. B., Ross Hubbel, E., Pitler, H., & Stone, B. (2012). Classroom instruction that works [electronic resource]: Research-based strategies for increasing student achievement. Alexandria, Va.: ASCD.

Feagans Gould, L., Mendelson, T., Dariotis, J. K., Ancona, M., Smith, A.S. R., Gonzalez, A. A., Smith, A. A., & Greenberg, M. T. (2014). Assessing fidelity of core components in a mindfulness and yoga intervention for urban youth: applying the CORE process. *New Directions for Youth Development*, 142, 59–81.

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Hagins, M. and Rundle, A. (2016), Yoga Improves Academic Performance in Urban High School Students Compared to Physical Education: A Randomized Controlled Trial. *Mind, Brain, and Education*, 10: 105–116.

Kisa, Z. & Correnti, R. (2014) Examining implementation fidelity in America's Choice schools: A longitudinal analysis of changes in professional development associated with changes in teacher practice. *Educational Evaluation and Policy Analysis*.

**Pure Edge Fidelity Observation Form**

<b>Date:</b>	<b>Instructor:</b>	<b>Classroom/Homeroom Teacher</b>	<b>Observer</b>	<b>Grade Level</b>	<b>Actual Start time:</b>										
<b>Class Time Period</b>	<b>School:</b>	<b>Student Count</b>	<b>Class Composition:</b> Males / Females / Mixed	<b>Lesson Number</b>	<b>Actual End time:</b>										
<b>Section (General Activity)</b>	<b>Overall purpose</b>	<b>Fidelity Focus: Does the activity occur?</b>			<b>YES/NO</b>										
<b>1. Routines and procedures</b>	Arrival and closing routines have been established	1. Visual outline displayed, with focus clearly stated, as students arrive.	YES	NO											
		2. Content objective is visible	YES	NO											
		3. Posture objective is visible	YES	NO											
		4. % (mark pct. at right) of students entered in an orderly way following instructor prompts/carrying out routine w/ little disruption.	0	25	50	75	100								
		5. % (mark pct. at right) of students exited in an orderly way following instructor prompts/carrying out routine w/ little disruption.	0	25	50	75	100								
<b>1n. Routines Notes</b>															
<b>2. Environment</b>	The space is conducive to H&W practice.	1. Classroom is arranged in an orderly fashion, all relevant materials well organized and accessible.	YES	NO											
		2. Environment: the physical environment is conducive to learning (e.g., temperature, lighting, floor conditions, etc.)	YES	NO											
		3. Environmental distractions interfere with lesson delivery (use notes to describe distraction)	YES	NO											
<b>2n. Environment Notes</b>															
<b>3. Content Fidelity</b>	The lesson objectives are introduced and included in the class.	1. Content objective is explicitly introduced in the first 15 minutes of class.	SD	D	N	A	SA								
		2. The content CONNECT is discussed with students. This may or may not be brief and may occur at any time in the lesson.	SD	D	N	A	SA								
		3. The content objective(s) were included in the lesson.	SD	D	N	A	SA								
		4. The posture objective(s) were included in the lesson.	SD	D	N	A	SA								
<b>3n. Content Fidelity Notes</b>															
<b>4. Time Allocation &amp; Breath/Mindfulness Tracking</b>	Students are instructed in postures, rest and program (can happen in any order)	1. Students instructed in breath	<b>Start time:</b>	<b>End time:</b>	<b>Total Mins:</b>										
		2. Students instructed in postures	<b>Start time:</b>	<b>End time:</b>	<b>Total Mins:</b>										
		3. Students instructed in rest	<b>Start time:</b>	<b>End time:</b>	<b>Total Mins:</b>										
		4. Students instructed in program content	<b>Start time:</b>	<b>End time:</b>	<b>Total Mins:</b>										
		5. <b>Breath: DURING THE POSTURE AND REST PORTIONS OF THE CLASS -</b> Mark a box each time students are prompted to focus on breath	1	2	3	4	5	6	7	8	9	10	11	12	13
6. <b>Mindfulness:</b> Mark a box each time students are prompted to be mindful	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15

Process Fidelity: Use the SD to SA scale (Right) to indicate the degree to which you agree with the following statements.					
SD (Strongly disagree)	D (Disagree)	N (Neither agree nor disagree)	A (Agree)	SA (Strongly agree)	
1. Instructor models human compassion by treating themselves and others kindly and empathically (e.g., greets students by name, is clearly engaged with students, is willing to explain, is attuned to student's affective state, etc.).					SD D N A SA
Notes:					
2. Instructor maintains classroom order, redirects negative behaviors, and reinforces on-task behavior as needed.					SD D N A SA
Notes:					
3. Instructor introduces topics in an age-appropriate manner; leads discussion effectively, engages students via question and response, and uses a variety of teaching strategies and classroom resources to meet needs of all learners.					SD D N A SA
Notes:					
4. Instructor demonstrates preparedness for the lesson: Appears fluent in the lesson plan for the day, is prepared to support student understanding, and is able to answer questions on the lesson.					SD D N A SA
Notes:					
5. Instructor teaches postures clearly, using both instructor and student demonstration, and offers modifications as needed. Does not use physical touch to instruct students in postures.					SD D N A SA
Notes:					
6. Instructor draws attention to the breath and movement connection throughout the class including: transitions between poses, while holding poses and transition into rest.					SD D N A SA
Notes:					
7. Instructor avoids inappropriate behaviors such as: verbal use of Sanskrit or use of Sanskrit on clothing; verbal description of program as yoga program and not a health & wellness program; unnecessary elaboration/lack of discretion in relating personal thoughts, ideas, and experiences.					SD D N A SA
Notes:					
8. ____% (mark at right) of students are engaged in class activities (e.g., body posture/movements/attentional focus suggest a motivation or intent to participate in the activities; absence of talking or disrupting nearby students)					0 25 50 75 100
Notes:					
9. What worked well:					
10. To consider:					

Pure Edge Fidelity Observation Form: Support Document

General Activity	Does the activity occur?	Observation Operational Definitions/Notes
1. Routines and procedures	1. <u>Visual outline displayed, with focus clearly stated, as students arrive.</u>	<p><u>Visual outline: can take any form (ie, Projected, on board, easel)</u>  <u>Focus: student centric language taken from one of the following:</u></p> <ul style="list-style-type: none"> <li>- Unit Enduring Understanding</li> <li>- Unit Essential Question</li> <li>- Unit Overarching Objective</li> <li>- Lesson Guiding Question</li> </ul>
	2. <u>Content objective(s) are visible</u>	Lesson content objectives from curriculum
	3. <u>Posture objective(s) are visible</u>	Lesson posture objectives from curriculum
	4. Students entered the space, got to their mats, and were ready to begin.	Round up to nearest percentage option
	5. Students exited the space in a calm and self-managed manner	Round up to nearest percentage option
2. Environment	1. Classroom is arranged in an orderly fashion, all relevant materials well organized and accessible.	Round up to nearest percentage option
	2. Environment: the physical environment is conducive to learning (e.g., temperature, lighting, floor conditions, etc.).	If no, use notes to explain
	3. <u>Environmental distractions interfere with delivery of lesson (use notes to describe distraction and impact on lesson).</u>	<p><u>Environmental Distractions: smells, sounds, bugs, interruptions, events.</u>  <u>Ex: fire drill, thunder, construction noise, interruptions because of shared classroom. Note: address student behavior related distractions in Section 6 under process fidelity.</u></p>
3. Content Fidelity	1. The content objective is introduced explicitly in the first 15 minutes of class.	See 1.2 focus
	2. The content <u>CONNECT</u> is discussed using interaction with students (questions/ answers). This may or may not be brief and may occur at any time in the lesson.	<p><u>Connect: instructor addresses the specific "Connect" from the lesson plan in class. This section connects today's lesson content to prior learning.</u></p>
	3. The content objective(s) were included in the lesson.	Lesson content objectives from curriculum
4. Time allocation & Breath/Mindfulness Tracking	4. The posture objective(s) were included in the lesson.	<p>If all content objectives detailed in the session are taught indicate "SA" shifting toward disagreement as objectives are omitted from the class session. If no content is taught 3.3 should be coded "SD"</p> <p>Lesson posture sequence from curriculum</p> <p>To be coded "SA" the entire posture sequence* from the session must be delivered with student understanding and engagement. As scripted postures are omitted from the session, the level of agreement should drop accordingly.</p> <p>*Modification of postures for simplification as would be appropriate in teaching a complex posture or for safety are not omissions from the posture sequence.</p>
	1. Students instructed in breath.	<p>Breath instruction is timed separately from postural instruction. Generally occurs at start of class but can occur at any point. Example: use of breathing ball, alternate nostril breathing, belly breathing, etc.</p>

2. Students instructed in postures	Postures begin when students first stand in Mountain pose or other opening posture, and end when they are asked to lay down for rest. If posture and content instruction overlap, time should be allocated to postures, not content.
3. Students instructed in rest	Rest begins when students lay down for rest and ends when the last student arises out of resting pose.
4. Students instructed in program content	Program content begins when instructor begins dialogue or direct instruction aligned to program content objective – classroom management instructions should not be counted here.
5. <b>Breath (DURING THE POSTURE AND REST PORTIONS OF THE LESSON mark a box each time students are prompted to focus on their breath.)</b>	Could include direct mention of breath such as during transitions or "hold for three breaths", other terms that draw student attention to breath such as: inhale, exhale, blow. OR breath modifiers such as lion or ocean when called for during movement portion of the class. Also possible cues could be visual such as arm movement or breathing ball movement.
6. <b>Mindfulness (Mark a box each time students are prompted to be mindful)</b>	Instruction that encourages students to notice/observe/recognize where, what, how they are doing without judgement or reaction. Examples: "It doesn't matter how far forward you fold, just notice where your body feels a stretch;" "Notice how your legs feel;" "Do you feel the difference?" (after alignment instruction); "Put your attention on your shoulders/legs/arms," etc.

**A note on process fidelity** - Use the notes sections under each element to indicate reasoning behind scoring, document noteworthy aspects of the observation or indicate "NA" and an explanation of why this element of process fidelity is not applicable (NA).

Process Fidelity: Use the SD to SA scale (Right) to indicate the degree to which you agree with the following statements.					
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1. Instructor models human compassion by treating themselves and others kindly and empathically (e.g., greets students by name, is clearly engaged with students, is willing to explain, is attuned to student's affective state, etc.).					SD D N A SA
Notes:					
2. Instructor maintains classroom order, redirects negative behaviors, and reinforces on-task behavior as needed.					SD D N A SA
3. Instructor introduces topics in an age-appropriate manner, leads discussion effectively, and engages students via question and response, and uses a variety of teaching strategies and classroom resources to meet needs of all learners.					SD D N A SA
4. Instructor demonstrates preparedness for the lesson: Appears fluent in the lesson plan for the day, is prepared to support student understanding and is able to answer questions on the lesson.					SD D N A SA
5. Instructor teaches postures clearly, using both instructor and student demonstration, and offers modifications as needed. Does not use physical touch to instruct students in postures.					SD D N A SA

6. Instructor draws attention to the breath and movement connection throughout the class including transitions between poses, while holding poses and transition into rest.	SD	D	N	A	SA
7. Instructor avoids inappropriate behaviors such as verbal use of Sanskrit or use of Sanskrit on clothing; verbal description of program as yoga program and not a health & wellness program; unnecessary elaboration/lack of discretion in relating personal thoughts, ideas, and experiences.	SD	D	N	A	SA
8. ____% (mark at right) of students are engaged in class activities (e.g., body posture/movements/attentional focus suggest a motivation or intent to participate in the activities; absence of talking or disrupting nearby students)	0	25	50	75	100