

EAL Facilitation Fidelity Measure (EALF-FM)



This measure is adapted from an instrument used to evaluate behavioral health facilitators and their fidelity to a specific modality. This measure is intended to be used by facilitators who are experienced in EAL and understand the principles of EAL facilitation. It can be used to rate fidelity to facilitation of the COASTER framework. This rubric evaluates a facilitator in five areas: equine skills, solo and/or co-facilitation styles, facilitation of the COASTER framework, and engaged response style. These are outlined below with definitions and description. The facilitator's behaviors are rated on a scale of consistency with the COASTER model, following best practices in EAL facilitation. For example, within the Engaged Response Style section, an EAL Facilitator consistent item is "Facilitator uses experiential methods/questions (i.e. helps the client(s) to notice and use their own experience rather than thoughts about their experience). A facilitator inconsistent item is "Facilitator lectures the client(s) (e.g. gives advice, tries to convince the client(s), etc)." This is because it is possible to be both EAL consistent and inconsistent within the same session, which may be useful to record for research or training purposes. The consistent and inconsistent items are not necessarily opposites of each other.

How the EALF-FM is implemented and scored

This is not a pass-fail system of evaluation. This system is meant to provide an opportunity for senior facilitators to give feedback on a given applicant's skills and competencies.

Procedure

- The focus of this measure is on the facilitator's behavior.
- Only observed behaviors are scored, not what the rater thinks the facilitator would have achieved if they had further time available.
- A single facilitator behavior can be counted in the rating for multiple relevant items.
- Use the boxes at the end of each section to keep track of your section scores.

Scoring

- A rating and point value is given for each item based on the behaviors heard or observed.
- A rating is given by selecting the option which best describes the behaviors heard or observed.
- Only whole point ratings are given.
- Raters may offer a narrative at the bottom of the scoring sheet with comments that refrain from bias, commenting only on observable behavior and offering feedback on what the consistent behavior looks like.
- If the applicant wishes to dispute their score, a blind review of the video will be conducted by another rater and the two assessments will be compared by a committee to determine a definitive score. The committee's decision will be final.

EAL Facilitation Fidelity Measure (EALF-FM)

Microcredential being applied for: EALF-ED EALF-PD EALF-O EALF-M

Applicant/facilitator's name: _____ Date of rating: _____

Co-facilitator's name: _____ Group or Ind session: _____

Scoring:

Blue items are scored as Yes or No *Yes ratings are MANDATORY for all blue items to meet expectations for the video
Purple items are scored as Rarely, Sometimes or Consistently
Green items are scores as Observed or Not Observed

Rating on consistency in following the COASTER Model

CHECK-IN

Expectations for Consistent Characteristics: The check-in shows both the greeting and the introduction of the life skill. Client(s) is (are) greeted in a welcoming way and invited into a space providing a moment to transition before introducing the client(s) to the equine in the working space. The facilitator checks-in with the client(s) using a quick activity to gauge the readiness of the group, then introduces the life skill or intention of the session followed by a short discussion of what that skill means to the client(s). The facilitator begins the transition to the working space setting expectations. Life skill can be flexible where discussed. Group norms or other expectations are also discussed including a safety agreement, if used, or can also be done in the working space as part of the opening.

Item	Description of EAL Facilitator's Behavior Consistent with COASTER Model	Rating
1	*Facilitator welcomes client(s) to a space separate from the equine and gives them a moment to arrive.	Choose an item.
2	*Facilitator guides the client through a short check-in exercise to get a sense of how they are doing.	Choose an item.
3	*Facilitator introduces the life skill for the session and engages the group or client(s) in a short discussion about what that life skill means to the client(s).	Choose an item.
4	*Facilitator has chosen a life skill for the session that aligns with the EAL speciality they are applying for	Choose an item.
5	*Facilitator engages client(s) in a short description of the activity and transitions the client into the working space with the equine partner	Choose an item.

Subtotal: _____

OPENING

Expectations for Consistent Characteristics: Once in the working space, the facilitator will give instructions for the interaction using metaphor, scenario, frontloaded or direct instructions. The facilitator will introduce staff, the equine partner and clarify their roles if needed. “This is your equine partner, Josie. Karen will be serving as the ES today.” Any consequences or safety considerations, if used, should be stated.

The facilitator will lay out any other conditions necessary for the interaction. If there is a skill that needs to be taught for the purpose of the interaction, it can be part of the opening, if short and brief, or it can be part of the activity.

Item	Description of EAL Facilitator’s Behavior Consistent with COASTER Model	Rating
6	*Facilitator transitions to the working space. They introduce the staff and equine partner as a member of the team using positive strength-based language that presents the equine as a partner, not a prop.	Choose an item.
7	Facilitator addresses equine and human safety, for example through establishing group norms or safety considerations, in a strength-based way.	Choose an item.
8	Facilitator explains the activity, including any consequences, using strength-based language and ties it back to the life skill. They only provide as much explanation as is needed and asks the client(s) if they are ready.	Choose an item.
9	The facilitator matches their energy to the nature of the session.	Choose an item.

Subtotal: _____

ACTIVITY

Expectations for Consistent Characteristics: If there is any formal explanation that is part of the activity, it is usually given at the beginning of the activity. The facilitator observes the interaction staying neutral as the client(s) begin to engage in the process of discovery with the activity. They use strength-based positive language to communicate any observations of either equine or human behavior that is relevant to the activity or ask prompting questions. Facilitator utilizes open-ended questions, allowing the client to drive majority of the discussion and provide their own answers (a good rule of thumb is 80% client, 20% facilitator).

Item	Description of EAL Facilitator’s Behavior Consistent with COASTER Model	Rating
10	Facilitator is a neutral observer of the client(s) interactions	Choose an item.
11	Facilitator moves easily between necessary teaching moments and facilitation, giving the client(s) space to explore, discover and try.	Choose an item.
12	Facilitator remains neutral with the equine in the working space, promoting the client’s engagement with the equine, not their own.	Choose an item.
13	Facilitator offers encouragement, exploration, and shows curiosity to solve problems through open-ended questions.	Choose an item.
14	Facilitator reinforces the group norms or parameters of the exercise in a strength-based way and does not step in to take anything away from the client(s).	Choose an item.
15	*Facilitator has structured the activity in alignment with the EAL speciality they are applying for	Choose an item.
16	*Facilitator spends appropriate time instructing essential horsemanship or riding skills. Facilitation supports the life skill as the focus of the session.	Choose an item.

Subtotal: _____

SHIFT

Expectations for Consistent Characteristics: The facilitator refrains from talking to allow the client(s) time to process for a few minutes to let the process unfold and observe the dynamics of the interaction. Based on what is observed, the facilitator will prompt or cue as appropriate the client(s) to redirect, draw attention to something, or apply another strategy to raise or lower the energy to add or take away pressure based on the dynamic of the client(s) and the equine partner to keep the client(s) in the stretch zone. They will use a strategy--such as “strange and wonderful”, the “magic wand”, RESET or NNICE--to enforce consequences of the activity.

Item	Description of EAL Facilitator’s Behavior Consistent with COASTER Model	Rating
17	Facilitator uses present moment focus methods, such as “Reset”, breathing and grounding (e.g. mindfulness tasks, tracking, noticing, NNICE, etc.) to increase awareness of the moment when the energy begins to escalate or the equine does something unexpected.	Choose an item.
18	Facilitator interrupts the dynamic if the dynamic gets chaotic, client gets overly frustrated or there is a stress response from the equine using magic wand or strange and wonderful. They use curiosity questions, including bringing awareness to the equine’s behavior, to help redirect the interaction in a more intentional direction.	Choose an item.
19	Facilitator helps the client(s) come up with their own solutions to encouraging the client(s) to use their available resources. Facilitator uses open-ended questions relating back to the life skill.	Choose an item.
20	Facilitator uses strategies taught in the Fundamentals of EAL online class, including “I wonder”, time, pressure, etc, to raise and lower the energy in the session in a way that supports the client(s) without rescuing them or making things intentionally more difficult.	Choose an item.

Subtotal: _____

EVALUATION

Expectations for Consistent Characteristics: The facilitator uses the information learned through their observation of the client(s) to pull out observable behaviors, “aha” moments, learning moments and such that relate to the life skills to help guide the reflection of the client(s).

Item	Description of EAL Consistent Behavior	Rating
21	Facilitator remains neutral and supportive throughout the rest of the interaction.	Choose an item.
22	Facilitator allows the client(s) to communicate when they think they have completed the task and celebrates with the client(s) when they are successful.	Choose an item.
23	Facilitator asks the client(s) to explore the definition of success if they aren’t successful and asks them what they need to feel successful. They don’t judge it as good or bad.	Choose an item.
24	*Facilitator’s self-reflection describes how they assimilated their observations of the client(s) to prompt their reflection.	Choose an item.

Subtotal: _____

REFLECTION

Expectations for Consistent Characteristics: Reflection is where the transfer of learning happens. This is when the facilitator helps to synthesize the learning and bring meaning to the interaction. The facilitator helps to draw the session to a close, either with a time out if the group did not complete the objective or waits for the group to acknowledge the objective was completed. They can prompt a question such as “Were you successful?”. The facilitator does not celebrate success until it is defined by the client(s). The facilitator initiates a circle-up to reflect either in the arena between “activities” or at the end of the session. The circle-up can include equine partners. The facilitator uses the three reflection question methods, asking open ended questions about the participant’s experience. They do not lead or steer the client(s) discussion but can bring up observations to direct the conversation. The facilitator talks less than the client(s), using common communication techniques such as reflection, paraphrasing, validation and other techniques to validate comments and gain clarification.

Item	Description of EAL Facilitator’s Behavior Consistent with COASTER Model	Rating
25	*Facilitator brings the client(s) to a space in the arena and asks them a general open-ended question to begin.	Choose an item.
26	*Facilitator ties the discussion back to the life skill for the session	Choose an item.
27	Facilitator gives the client(s) opportunities to express their own opinions about how the session went and what they learned and experienced.	Choose an item.
28	Facilitator uses clarifying, summarizing, and reflective statements to support the client(s) to a consensus of the outcome of the session. Asks about the application of the life skill in real life.	Choose an item.
29	Facilitator guides the discussion by offering observations, no judgments, and ties the comments back to life skills.	Choose an item.
30	Facilitator clearly observes/acknowledges the non-verbal cues of the client(s) and knows when to shift to summarizing the reflection and connect to the life skill to successfully achieve transfer of learning.	Choose an item.

Subtotal: _____

CLOSE

Expectations for Consistent Characteristics: After the reflection is over, the client(s) will go back into the area they started. The facilitator closes the session with some final reflective learning comments, a call to action and sets up the following session accordingly.

Item	Description of EAL Consistent Behavior	Rating
31	*Facilitator allows client(s) time to say goodbye and demonstrates gratitude to equine before transitioning to the end of the session.	Choose an item.
32	*Facilitator guides the client(s) into the closing space.	Choose an item.
33	*Facilitator closes with a quick final comment, closing exercise, or simple reflection summary to connects to the life skill of the session. “What’s one thing...”	Choose an item.
34	*Facilitator sets up the next session with a description of what they will work on next.	Choose an item.

Subtotal: _____

DEMEANOR

SOLO FACILITATOR

Expectations for Consistent Characteristics: The facilitator maintains an equal, curious, and non-judgmental stance, showing warmth and interest while being guided by the client’s input. Rather than leading clients to specific goals, they guide them to their own conclusions through experiential techniques, encouraging experimentation, asking thoughtful questions, and focusing on life skills and the equine partnership. They hold space for emotions while redirecting to the present, using strength-based language and adjusting their energy to fit the dynamic. Acting as a “rainmaker,” they avoid rescuing clients during frustration, prioritize the welfare of both humans and equines, and balance instruction with facilitation, allowing the session to flow naturally based on the interaction’s dynamics.

Item	Description of EAL Facilitator’s Behavior Consistent with COASTER Model	Rating
35	Facilitator is approachable with an inviting presence.	Choose an item.
36	Facilitator is present and attentive while moving around the activity area.	Choose an item.
37	Facilitator uses open ended inquiry and not teaching during the session, giving the client a chance to give thoughtful answers. The facilitator talks less than the client.	Choose an item.
38	The stance taken by the facilitator is neutral, curious and non-judgmental. They use strength-based language instead of correction a “wrong” answer.	Choose an item.
39	Facilitator demonstrates a willingness let client(s) explore and make mistakes coaching them through difficult moments to build confidence and tying it back to the life skill.	Choose an item.

Subtotal: _____

CO-FACILITATION WITH AN EQUINE PROFESSIONAL

(Rated above for personal demeanor AND rated below if co-facilitating)

Expectations for Consistent Characteristics: The stance taken by both facilitators is equal, curious and non-judgmental. The facilitators show all of the attributes noted above and they fluidly and equally yield back and forth to each other’s leadership in each step of the COASTER model. Each one has a defined role with one distinctly focused on the equine and the other distantly on the human, and it is hard to tell which one is the lead facilitator. Communication between facilitators is positive and models functioning relationships. They clearly have predetermined procedures for redirection and other ways to shift the dynamic and respond to the unexpected with calm confidence.

Item	Description of EAL Facilitator’s Behavior Consistent with COASTER Model	Rating
40	Facilitator creates flow and conversational style with co-facilitator.	Choose an item.
41	Facilitator yields leadership back and forth between them and their co-facilitator.	Choose an item.
42	Facilitator communicates in a positive way with their co-facilitator, modeling strength-based communication	Choose an item.
43	Facilitator focuses on the human participants but also defers to the equine partner advocate for inclusion.	Choose an item.
44	Facilitator creates an environment of seamless co-facilitation so that there is no apparent dominant facilitator for the session.	Choose an item.

Subtotal: _____

Not applicable, solo facilitator

EQUINE CONSIDERATIONS

Expectations for Consistent Characteristics: The equine partner is an equal partner in the session. The facilitator notices and responds to the equine’s behavior in a session, being flexible to address any unexpected behaviors, and adjust the energy of a session based on behavior and support the client(s) in making a connection with the equine partner. Facilitator has a strategy to manage unexpected equine behavior.

Item	Description of EAL Facilitator’s Behavior Consistent with COASTER Model	Rating
45	*Facilitator includes equine partner(s) as an active and equal partner in the session.	Choose an item.
46	*Facilitator maintains or adjusts the dynamic of the exercise as appropriate to keep their equine partner(s) safe.	Choose an item.
47	*Facilitator does not engage with the equine(s) and stays neutral.	Choose an item.
48	*Facilitator holds client(s) accountable for utilizing safe horsemanship techniques	Choose an item.

Subtotal: _____

Scoring

A total score is calculated by adding up the sub-scores from each section. Applicants are scored EITHER as a solo facilitator or as a co-facilitator.

As a Solo Facilitator A minimum score of 36, <u>with all mandatory elements met</u> , is required for a microcredential to be granted.	As a Co-Facilitator A minimum score of 39, <u>with all mandatory elements met</u> , is required for a microcredential to be granted.
Section subtotals	Section subtotals
Check-in (MAN 5*): _____	Check-in (MAN 5*): _____
Opening (MAN 1*): _____	Opening (MAN 1*): _____
Activity (MAN 2*): _____	Activity (MAN 2*): _____
Shift: _____	Shift: _____
Evaluation (MAN 1*): _____	Evaluation (MAN 1*): _____
Reflection (MAN 2*): _____	Reflection (MAN 2*): _____
Close (MAN 4*): _____	Close (MAN 4*): _____
Demeanor (solo): _____	Demeanor (co): _____
Equine considerations (MAN 4*): _____	Equine considerations (MAN 4*): _____
Total EAL Facilitator Behavior Consistency Score:	Total EAL Facilitator Behavior Consistency Score:
EAL Inconsistent Behaviors Observed (see page 9 for descriptions):	EAL Inconsistent Behaviors Observed (see page 9 for descriptions):

Additional Feedback

Session is of appropriate length: YES NO

Rater's feedback on applicant's self-reflection of their video demonstration:

Rater's feedback on observable behavior:

Where is the applicant excelling?

Where can the applicant grow their skills?

If the applicant did not earn a passing score, what competencies is the applicant lacking and/or what are the areas they should focus their efforts on for resubmission?

Signature of rater

Date of rating

Possible EAL Inconsistent Behaviors that may be cited as observed by the rater:

1. Facilitator rushes group into the space without welcoming them.
2. Facilitator skips the check-in or does it in a way that doesn't allow the client time to express how they are doing in that moment.
3. Facilitator introduces the life skill and teaches what the skill is and what it looks like in application.
4. Facilitator moves abruptly to the working space with equines without a discussion about norms and expectations.
5. Facilitator introduces the staff without describing their role and relegates the equine partner to a prop.
6. The activity could be completed without the equine and achieve the same result.
7. Facilitator tells the rules and set the expectations for the group, uses demonstration in a way that does not include any hands-on involvement from the client(s) to teach necessary skills. They do not include any discussion of group norms, expectations or safety.
8. Facilitator seems unsure of the interaction directions and takes a long time to give instructions.
9. Facilitator doesn't mention the life skill.
10. Facilitator fails to organize or ground the group before starting. Opening is chaotic.
11. Facilitator is not present or attentive during the session.
12. Facilitator interacts with or touches the equine, distracting from the client(s).
13. Facilitator does not allow client(s) to drive the majority of the conversation
14. Facilitator encourages action without first hearing, exploring or showing curiosity.
15. Facilitator steps in and imposes their own agenda onto the activity, tells the client(s) they are doing it
16. incorrectly and/or takes away equipment from the client(s), such as the lead rope for the equine.
17. Facilitator intentionally raises and lowers the energy of the group to rescue the client(s) when they are frustrated.
18. Facilitator continues talking to the client to "help" them during the session.
19. Facilitator stops the exercise to teach the client what "needs" to be done.
20. Facilitator allows the equine to go into flight mode or fails to recognize a stress response and does not check in with the equine professional.
21. Facilitator tells the client(s) they did a good job, or great work.
22. Facilitator celebrates for the client(s) even if they did not identify having completed the task
23. Facilitator's self-reflection does not demonstrate awareness of how observations prompt their reflection.
24. Facilitator convinces the client(s) they completed the task even though they may not be how the client(s) feel.

25. Facilitator imposes their own thoughts or observations on the experience and points out what client(s) did right or wrong.
26. Facilitator speaks more than the clients.
27. Facilitator lets the reflection go on longer than it should even though the body language and dynamic of the client(s) shows they are finished.
28. Facilitator does not ask open-ended questions to promote a good discussion.
29. Facilitator does not allow the reflection go long enough to achieve the transfer of learning.
30. Facilitator does not allow time to say goodbye to equine and rushes client(s) to transition to the end of the session.
31. Facilitator dismisses the client(s) without facilitating a transition to the end of the session.
32. Facilitator does not refer to the next session.
33. Facilitator does not allow any time to say goodbye to the equine.
34. Facilitator is not approachable with an uninviting presence.
35. Facilitator lectures the client(s) (e.g. gives advice, tries to convince the client(s), etc).
36. Facilitator rushes to reassure, diminish or move on from “unpleasant” or “difficult” thoughts and feelings when these arise.
37. Facilitator tries to teach the client(s) and instructs, citing and correcting wrong answers.
38. Facilitator relegates the equine partner to a prop in the activity.
39. One facilitator dominates all conversation and leadership.
40. Facilitator uses sharp directive language, giving instruction to their co-facilitator.
41. Facilitator does not yield leadership and dominates the session, co-facilitator is not included.
42. Facilitator focuses on both the humans and equines in the session.
43. There is an apparent dominant facilitator for the session.
44. Session could have been done without an equine and produced the same result.
45. Facilitator uses big energy and puts the equine in flight mode.
46. Facilitator touches the equine and shows affection during the session.