

Facilitator's Guide

Companion to:

**Providing Independent Living Support:
Training for Senior Corps Volunteers**

**Supporting Children and Youth:
Mentor Training for Senior Corps Volunteers**

WORKSHEETS AND FORMS

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Logistics Planning Form

Training Date(s)		Length/Time	
Facility		Location	
Participant #	Anticipated #		
	Actual #	Facilitator	
Lodging for participants/guests			
Special Activities requiring early attention:			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Special Arrangements (e.g., medical care, disability access, child care, visitors)			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supplies (e.g., easel pads, markers, tape, audiovisual equipment, etc.)			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BUDGET	Anticipated	Actual	
Facility/meeting room			
Lodging			
Meals/Snacks			
Materials			
Audio Visual			
Other:			

Notes (Lessons learned, issues):

Sample Logistical "To Do" Checklist ¹

To Do	Person Responsible	Deadline Date	Completion <input checked="" type="checkbox"/>
TRAINING MATERIALS			
Order/purchase supplies (easel pads, markers, masking tape, pens, paper, etc.).			<input type="checkbox"/>
Finalize training agenda.			<input type="checkbox"/>
Duplicate any materials needed.			<input type="checkbox"/>
Prepare materials transportation to site.			<input type="checkbox"/>
Prepare easel paper/easel sheets.			<input type="checkbox"/>
Transport training supplies to site.			<input type="checkbox"/>
FACILITY ARRANGEMENTS			
Determine disability needs.			<input type="checkbox"/>
Identify and visit potential sites.			<input type="checkbox"/>
Select site.			<input type="checkbox"/>
Confirm firm costs and facility billing arrangements.			<input type="checkbox"/>
Sign contract with facility. ²			<input type="checkbox"/>
Reserve training room space.			<input type="checkbox"/>
Confirm training room arrangements with facility.			<input type="checkbox"/>
Determine audio-visual equipment needs, if any.			<input type="checkbox"/>
Arrange audio-visual equipment acquisition.			<input type="checkbox"/>
Arrange meals/refreshments/special dietary needs.			<input type="checkbox"/>
Arrange participant check-in/out process.			<input type="checkbox"/>
Determine on-site office services needed (e.g., copying, computer access).			<input type="checkbox"/>
PARTICIPANT ARRANGEMENTS			
Send participants first notice of training ("Save the date!")			<input type="checkbox"/>
Send host sites/collaborating agencies/facilitators, presenters, and guests first training notice.			<input type="checkbox"/>
Prepare detailed information for participants (e.g., flyer).			<input type="checkbox"/>
Send host sites/collaborating agencies/facilitators/presenters/participants detailed instructions.			<input type="checkbox"/>

¹ Adapted from MOSAICA Logistical Arrangement Checklist.

² Even for donated space, it is wise to get a written document noting any expectations and responsibilities (e.g. clean-up, use of equipment)

To Do	Person Responsible	Deadline Date	Completion <input checked="" type="checkbox"/>
Obtain lodging and training room requirements from participants.			<input type="checkbox"/>
Prepare lodging lists for participant arrival.			<input type="checkbox"/>
FACILITATOR AND TRAINING ROOM ARRANGEMENT CHECK-IN			
Select facilitator/presenter.			<input type="checkbox"/>
Obtain lodging and training room requirements from facilitators.			<input type="checkbox"/>
Arrange training room seating.			<input type="checkbox"/>
Review session materials.			<input type="checkbox"/>
Make any agenda adjustments as needed.			<input type="checkbox"/>
Check that materials/supplies are in training room.			<input type="checkbox"/>
Check that audiovisual equipment is available.			<input type="checkbox"/>
Check that refreshments are available.			<input type="checkbox"/>
Check that room temperatures are comfortable and be sure you understand how to adjust them.			<input type="checkbox"/>
Locate light switches and power outlets.			<input type="checkbox"/>
Confirm/check in with presenters.			<input type="checkbox"/>
Confirm number of people at meals.			<input type="checkbox"/>
Ensure evaluation forms are available as well as determine a location to collect them.			<input type="checkbox"/>
END OF TRAINING			
Do a final walk-through of facility to locate equipment, materials, and personal belongings.			<input type="checkbox"/>
Collect completed evaluation materials.			<input type="checkbox"/>
Debrief with key individuals/team.			<input type="checkbox"/>
POST TRAINING / FOLLOW-UP			
Check, record, pay bills for all aspects of training.			<input type="checkbox"/>
Send thank you notes sent to presenters, guests, sponsors, team, and others who helped.			<input type="checkbox"/>
Tally and analyze evaluation responses.			<input type="checkbox"/>
Share session notes and/or evaluation results with participants, collaborating partners, presenters.			<input type="checkbox"/>
Complete any promised follow-up.			<input type="checkbox"/>
Document agenda/materials changes for future use.			<input type="checkbox"/>

Sample Notice for Workshop

(This sample notice is for the Module 3 workshop)

Understanding the Physical, Emotional, and Social Challenges Experienced by Clients

Location:

Date:

Time:

Cost:

What to Bring:

Directions to Facility:

There are many challenges faced by homebound, frail clients, including loss or limitations around mobility, self-care, activities of daily living, and companionship. This 60-75 minute workshop will describe some of these issues and offer tips for volunteers to better deal with these issues and assist their clients.

*Providing Independent Living Support:
Physical, Emotional, and Social Challenges Experienced by Clients*



Trainer: _____

Date: _____

Your Program Name

Phone: _____

Fax: _____

Email: _____



Sample Certificate of Completion

(sample certificate for Module 7, SCY)

Certificate of Completion



Presented to

Ms. Estelle Hawkins

Serving Preschool Children (Ages 3-5)

Serving Children and Youth:

Mentor Training for Senior Corps Volunteers

Signature

Date

Preparation Checklist

To Do	Person Responsible	Deadline Date	Completion <input checked="" type="checkbox"/>
ONE MONTH BEFORE TRAINING			
Meet with team. Identify responsibilities.			<input type="checkbox"/>
Make sure computer used for web conferencing is configured with necessary software and Internet access.			<input type="checkbox"/>
Test technical (i.e., software, hardware, phone) under the same conditions most participants will encounter.			<input type="checkbox"/>
Schedule webinar session using your web conferencing system.			<input type="checkbox"/>
Develop participant procedures for registration and support process.			<input type="checkbox"/>
Send out webinar invitation and registration info.			<input type="checkbox"/>
Establish group norms or electronic etiquette.			<input type="checkbox"/>
Plan for an alternative if the technology fails.			<input type="checkbox"/>
TWO WEEKS BEFORE TRAINING			
Double check that all participants are registered for the session. Remind them to run system checks and install any required software.			<input type="checkbox"/>
Conduct orientation session to train participants to use webinar system.			<input type="checkbox"/>
ONE WEEK BEFORE TRAINING			
Send reminder to participants with registration information. Make sure they have all necessary material. Remind them to complete any exercises prior to the session, if applicable.			<input type="checkbox"/>
Finalize webinar roles and responsibilities with your team or other presenter.			<input type="checkbox"/>
Develop any material to be accessed during session.			<input type="checkbox"/>
Review material and practice!			<input type="checkbox"/>
Develop technical assistance plan to address minor technical issues (e.g., who will handle what, phone numbers, etc.).			<input type="checkbox"/>
Develop back-up plan.			<input type="checkbox"/>
Do a dress rehearsal with your team to run through the agenda and troubleshoot technical problems. Invite a few folks to serve as "participants."			<input type="checkbox"/>

To Do	Person Responsible	Deadline Date	Completion <input checked="" type="checkbox"/>
Optional-Secure a second computer for you or your team to use as a "dummy" participant so that you can see what participants see.			<input type="checkbox"/>
Put your evaluation form into an online format or have it ready to e-mail after the session			<input type="checkbox"/>
1-2 DAYS PRIOR TO TRAINING			
As a reminder, re-send registration/login information so participants have it handy (links, dates, time).			<input type="checkbox"/>
Prepare documents (put in PDF format) and e-mail to participants. Include the PowerPoint slides.			<input type="checkbox"/>
30 MINUTES PRIOR TO TRAINING			
Get your cup of coffee or glass of water! Put "do not disturb" sign on your door.			<input type="checkbox"/>
Set up, log on and open the PowerPoint slides and other documents you will be viewing with participants.			<input type="checkbox"/>
Ask partner (the techie) or colleague to log on and check participant interface.			<input type="checkbox"/>
Have hard copies of registration list, phone conference information, and other documents that will be presented.			<input type="checkbox"/>
Dial into conference call 10-15 minutes before time (if applicable). Greet participants and troubleshoot technical difficulties.			<input type="checkbox"/>
Set up webinar recording, if applicable.			
AT START OF TRAINING			
Before beginning, ensure that all participants have joined the session.			<input type="checkbox"/>
Create space for participants to introduce themselves in a post to the chat window as a first exercise, with perhaps a photo or a personal detail.			<input type="checkbox"/>
Start recording webinar, if applicable.			
Formally welcome participants and set the scene to help participants understand the purpose, expectations, and details of the experience including how you will address questions.			<input type="checkbox"/>
At the end, formally thank participants, provide next steps (i.e., have them complete feedback survey online) and recap any document exchange or follow-up work.			<input type="checkbox"/>
End recording webinar, if applicable.			
Log out and hang up.			<input type="checkbox"/>

To Do	Person Responsible	Deadline Date	Completion <input checked="" type="checkbox"/>
FOLLOW-UP/AFTER TRAINING			
Thank participants and send or remind them of completing feedback survey.			<input type="checkbox"/>
Follow-up with resource requests or additional training material promised or specific questions.			<input type="checkbox"/>
Collect feedback, enter it and discuss it with team to improve next webinar.			<input type="checkbox"/>
Review and post recording. Send recording link to group.			<input type="checkbox"/>

Participant Electronic Readiness Questionnaire

Although distance education is supported by the same learning principles as in-person training, there is some information that will be helpful to us to determine the best match and type of distance learning. Please complete the following questions to the best of your ability. If you are unsure of the question, please feel free to call (*name and phone number*) for support.³

Technology resources:

Do you have a computer? Yes No

If you have a computer, please answer the following statements.

My computer is a PC MAC. It is ___ years old.

I am not comfortable, comfortable, very comfortable using my computer.

Do you have easy access to Internet service? Yes No

If yes, do you have "dial-up" access DSL/cable T1/T3

Which web browser and version do you have? _____

Learning Preferences:

Have you participated in (enter the type of learning) before? Yes No

If yes, was your experience favorable, undecided, or unfavorable?

If yes, did you have the technology to participate easily? Yes No

If yes, what, if any, problems occurred during this training?

³ source: <http://www.ion.uillinois.edu/resources/tutorials/pedagogy/studentprofile.asp>

Training Feedback Survey

Please help us improve our training sessions by providing feedback on the training you attended. Thank you!

Training/Session Name: _____ Date: _____

Lead Trainer/Facilitator: _____

Program you serve with: SCP FGP RSVP Other: _____

Please rate this session using the following scale:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
	1	2	3	4	5
1. The subject matter was presented effectively.					
2. The facilitator was knowledgeable.					
3. The facilitator responded to questions.					
4. There were enough opportunities for discussion.					
5. The written materials are useful.					
6. The session met my expectations.					
7. As a result of this training, I gained new knowledge applicable to my volunteer assignment.					
8. I plan to apply what I learned at this session.					

9. What did you like best about this session?

10. What would have improved this session?

Thank You! Your feedback will help us to improve our training!

Trainer/Facilitator Skills Assessment Form

For each of the questions below, rate your knowledge and skills on the following scale:

5 = Excellent - feel fully prepared to deal with this issue in training.

4 = Very Good - feel well prepared but could sharpen knowledge or skills.

3 = Good - feel somewhat prepared but would prefer to increase knowledge or skills.

2 = Fair - limited capacity; would not like primary responsibility for this in training.

1 = Poor or Non-Existent - little or no related experience; would not want to deal with this issue in training without more knowledge or skill; or not familiar with this concept.

A. Please assess your training/facilitation and group process skills:

- ___ 1. Using icebreakers and energizers.
- ___ 2. Explaining and using learning objectives.
- ___ 3. Preparing and delivering "lecturettes."
- ___ 4. Using questions to promote discussion and learning.
- ___ 5. Presenting and teaching skills or concepts.
- ___ 6. Preparing pre-written easel paper and using easel paper during a training session.
- ___ 7. Using audio-visuals (overheads, slides).
- ___ 8. Using small group/pair/experiential/cooperative learning (role play, scenario analysis).
- ___ 9. Helping groups to "process" exercises and apply this learning to their roles/assignments.
- ___ 10. Supporting individual or group presentations.
- ___ 11. Listening to/understanding member concerns and feedback.
- ___ 12. Helping participants use reflection time to integrate information into their assignments.
- ___ 13. Collecting and using feedback from training.
- ___ 14. Dealing with individuals who try to dominate training.
- ___ 15. Getting quiet members to participate.
- ___ 16. Motivating members and keeping them interested.
- ___ 17. Handling conflict in a training situation.
- ___ 18. Communicating confidence as a facilitator.
- ___ 19. Keeping a group on track and on schedule without cutting off discussion.
- ___ 20. Knowing when and how to modify a training agenda on-site.

Total Score: _____ (possible maximum = 100)

B. Identify the five most important skills you feel you need to improve prior to the training.

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

C. Identify your five strongest skills - the ones you are most prepared to use during the training.

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____