Virtual Operations Series
Train the Trainer
July 13th, 2023

INSIDE-OUT LEARNING INC
Transformative Learning That Lasts

Federal Reserve Bank of San Francisco

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LEARNING TOGETHER

My requests:

- Cameras on
- Mute when not talking
- Use Chat for questions

Your requests of me and of each other?

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Hello!

We are excited for you to join us at our upcoming Train-the-Trainer (T3) session. This time will be focused on helping you prepare for and rehearse the role you will play in facilitating FRB discussion groups.

During our workshop, you will:

- Learn best practices for facilitating discussions.
- Prepare for and practice facilitating small-group discussions.
- Give and receive feedback with each other.

To get the most from this session:

- Watch these videos on Teams Meet tools. There are 5 short videos totaling no more than 15 minutes.
  - View LinkedIn Learning Video Collection
- Come with a spirit of learning and adventure. No matter if you are a veteran facilitator or if this is a new experience, we will all be learning and trying new things together.

We look forward to our time together!

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REFLECT

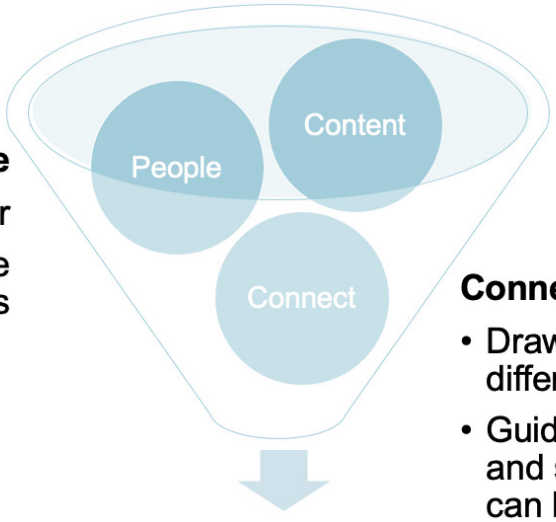
Think about discussion groups you've participated in.

What made the discussion group effective or ineffective?

WHAT IS THE FACILITATOR'S ROLE?

People

- Act as a moderator
- Make sure everyone participates



Content

- Prepare and ask questions
- Provide structure to and guide the discussion

Connect & Summarize

- Draw connections between different ideas
- Guide participants to identify and summarize actions that can be taken from learning

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TOP TIPS TO FACILITATE DISCUSSIONS

THE FACILITATOR'S MANTRA

1. **Mind the Time** | Know when you are ahead or behind. Know your strategy for either.
2. **Watch the Tell |** If you think you are talking too much, you probably are. Ask a question or start an activity.
3. **Trust the Design |** Resist the urge to explain everything. Participants will connect many dots during activities and discussions.

PRESENTING INFORMATION

4. **Imagine You Are Talking with a Few Friends |** Adopt a neutral posture, make eye contact with a few people, work the room, give them time to take in information (don't read slides to them).
5. **Beware of the Facilitator Time Warp |** Look for clues that your pace is appropriate, get feedback when possible.
6. **Pauses Are OK |** Don't worry too much about the ums and ahs, but try to substitute silence. This also helps with pacing.

FACILITATING DISCUSSION

7. **Offer Questions Rather Than Answers |** Flip questions back to the group, ask for other perspectives, rephrase their questions.
8. **Ask for Their Experiences, Not Their Opinions |** Encourage them to apply what they are learning to their real-world encounters, rather than evaluating it.
9. **Allow Dissent, but Not Disruption |** You are entrusted with making this time valuable to everyone who is participating. It's not important that everyone agree on every point, but that they are challenged to explore and think.

MINDSET

10. **Remember the Wisdom of Dory: "Just Keep Swimming"** | Tension in a learning experience is healthy. It is OK if everything doesn't go perfectly. What matters is that participants learn and commit to change. Everyone is rooting for you to succeed!

BONUS TIP

11. **Preparation is Everything!**
    - Create brief notes – focus on key language, timing, and great questions to ask.
    - Test the technology. Know who to call if something doesn't work.
    - Practice out loud. The path from your brain to your mouth can be trickier than you think.

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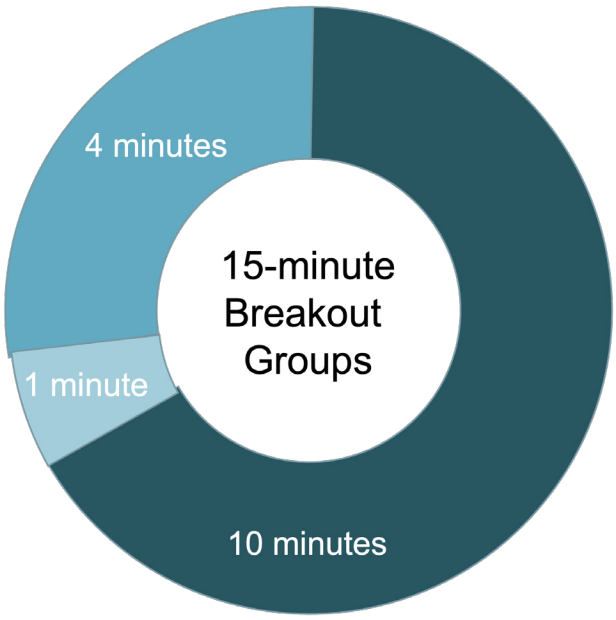
TODAY'S DISCUSSION PRACTICE ROUNDS



- We will watch a video together.
- In breakout groups of 3 or 4, one person will facilitate a discussion about the content.
- Breakout group will debrief internally and give feedback to the facilitator.
  - 1 minute – finish filling out feedback forms
  - 4 minutes – share feedback, starting with the facilitator reflecting on his/her own performance
- Breakout groups end, then whole group will debrief the discussion.

DISCUSSION ACTIVITY ROLES



FACILITATOR*

- Lead a discussion based on the shared content
- Use provided questions to get the discussion started
- Come up with your own questions (use question stems)

*Change who facilitates each round so everyone gets a chance to practice!



PARTICIPANTS

- Participate in the discussion
- Evaluate the facilitator using the feedback tool
- Share constructive feedback during the internal debrief

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GIVING FEEDBACK

For each round of feedback you will fill out a Feedback Tool and give it to the presenter. Remember that they may review this at a later date, so be specific. It is more important to offer observations than suggestions.

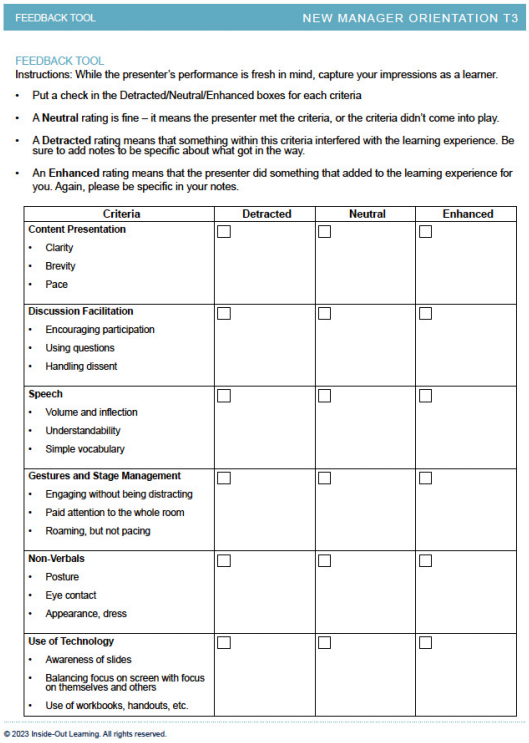
You are providing feedback about their effectiveness in facilitating learning. For each criteria, put a check in the box that reflects your experience as a learner:

- Detracted: Something got in the way of your learning.
- Neutral: The criteria was unremarkable.
- Enhanced: Something about the criteria was helpful to you as a learner.

RECEIVING FEEDBACK

Most of your ratings will probably be neutral. This means that you effectively facilitated the learning experience, and the program design and materials worked as intended.

- For Detractors, consider how you might adjust your approach to move these to neutral.
- For Enhancers, think about how to leverage these criteria even more to create a more effective, memorable learning experience.



FEEDBACK TOOL NEW MANAGER ORIENTATION T3

FEEDBACK TOOL

Instructions: While the presenter's performance is fresh in mind, capture your impressions as a learner.

- Put a check in the Detracted/Neutral/Enhanced boxes for each criteria
- A **Neutral** rating is fine – it means the presenter met the criteria, or the criteria didn't come into play.
- A **Detracted** rating means that something within this criteria interfered with the learning experience. Be sure to add notes to be specific about what got in the way.
- An **Enhanced** rating means that the presenter did something that added to the learning experience for you. Again, please be specific in your notes.

Criteria	Detracted	Neutral	Enhanced
Content Presentation • Clarity • Brevity • Pace	☐	☐	☐
Discussion Facilitation • Encouraging participation • Using questions • Handling dissent	☐	☐	☐
Speech • Volume and inflection • Understandability • Simple vocabulary	☐	☐	☐
Gestures and Stage Management • Engaging without being distracting • Paid attention to the whole room • Roaming, but not pacing	☐	☐	☐
Non-Verbals • Posture • Eye contact • Appearance, dress	☐	☐	☐
Use of Technology • Awareness of slides • Balancing focus on screen with focus on themselves and others • Use of workbooks, handouts, etc.	☐	☐	☐

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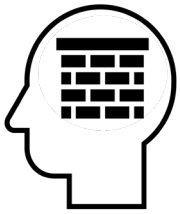
Additional Notes

GROWTH MINDSET





Video Notes

DISCUSSION

MY ROLE (CHECK ONE):

- ☐ Facilitator
- ☐ Participant

STARTER QUESTIONS FOR FACILITATOR

1. Do you agree that having a growth mindset is essential to professional development? Explain why or why not.
2. How would you characterize the role that innovation, risk taking, and failure play with developing and maintaining a growth mindset?
3. Reframe one of your deepest fears to be a statement that fits with having a growth mindset.

Discussion Notes / Additional Questions (see next page for more space if needed)

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NOTES

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BLOOM'S TAXONOMY QUESTION STEMS

LEVEL 1 | REMEMBER: RECALL FACTS AND BASIC CONCEPTS

- Describe what happens when …?
- How would you define …?
- What do you remember about …?

LEVEL 2 | UNDERSTAND: GRASP & EXPLAIN MEANING OF INSTRUCTIONAL MATERIALS

- Give an example of...
- Explain why...
- What can you infer from …?
- What can you say about …?

LEVEL 3 | APPLY: USE INFORMATION IN NEW SITUATIONS

- Do you know of another instance where …?
- Judge the effects of … What would result …?
- What would the result be if …?
- How would you modify …?

LEVEL 4 | ANALYZE: DRAW CONNECTIONS AMONG IDEAS AND CONCEPTS

- What do you see as other possible outcomes?
- How is … connected to …?
- How is … similar to / different from …?
- What can you infer about…?
- Determine the point of view, bias, values, or intent underlying the presented material
- Discuss the pros and cons of …
- What conclusions …?

LEVEL 5 | EVALUATE: MAKE DECISIONS AFTER EVALUATING INFORMATION

- What are the consequences of…?
- What are the possible outcomes for…?
- What changes to … would you recommend?
- Do you think … is a good or bad thing?
- What are the alternatives?
- What criteria would you use to assess…?
- What influence will … have on our lives?
- What is the most important …?

LEVEL 6 | CREATE: USE INFORMATION TO CREATE SOMETHING NEW

- Can you see a possible solution to …?
- How would you generate a plan to …?
- How would you improve …?
- How would you portray …?
- Can you design a … to …?
- How would you test …?
- Propose an alternative. How else would you …?
- What changes would you make to revise …?

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BLOOM'S TAXONOMY

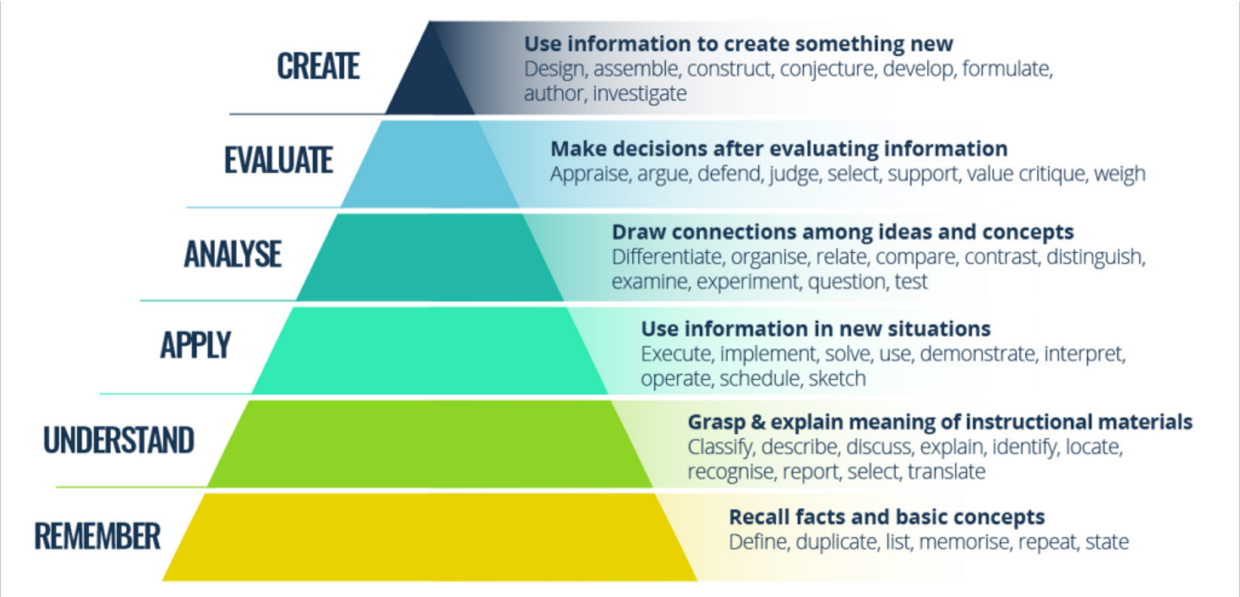

Image source: https://www.growthengineering.co.uk/what-can-blooms-taxonomy-tell-us-about-online-learning/

Video Notes

DISCUSSION

MY ROLE (CHECK ONE):

- ☐ Facilitator
- ☐ Participant

STARTER QUESTIONS FOR FACILITATOR

1. What challenges can you forsee when using the higher levels of questions in Bloom's Taxonomy? What might you do to overcome these challenges?
2. Create a discussion question about the Growth Mindset video using the higher levels of Bloom's Taxonomy.

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DISCUSSION NOTES / ADDITIONAL QUESTIONS

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THE USUAL SUSPECTS

Most participants are eager to learn, to share, and to make the session productive for all. Occasionally you will run into one of these "usual suspects."

Suspect:	Strategy to counteract:
The Joker Every moment is an opportunity to show off their incredible wit, but their attempts at humor not only waste time, they may devalue the content or disrespect others.	
Mr. or Mrs. Incredible Whatever someone shares, they've got a better story, usually highlighting themselves.	
The Flash They're here, then they are gone – into their phone, stepping away from the session, and late back from every break.	
Groot Rarely speaks, and when they do it is in monosyllables. They might have valuable observations or insights, but you need to extract it from them one grunt at a time.	
Wolverine Projects negativity and clearly doesn't want to be here, doing this, and wants everyone to know it.	
Wild Card Who is a "usual suspect" you've run across?	

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MANAGING THE "USUAL SUSPECTS"

Notes

DISCUSSION

MY ROLE (CHECK ONE):

- ☐ Facilitator
- ☐ Participant

STARTER QUESTIONS FOR FACILITATOR

1. Brainstorm some reasons for why your "usual suspect" would behave in their designated way.
2. What are the consequences of not addressing / choosing to ignore your "usual suspect"?
3. Generate a response of exactly what you would say to address the "usual suspect" your group has been assigned.

Discussion Notes / Additional Questions (see next page for more space if needed)

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CONNECTING THE DOTS: TURNING LEARNING INTO ACTION



Video Notes

DISCUSSION

MY ROLE (CHECK ONE):

- ☐ Facilitator
- ☐ Participant

STARTER QUESTIONS FOR FACILITATOR

1. Judge the value of the strategy proposed in the video of listening for actions during a training, presentation, or discussion.
2. Propose an alternative or expand upon the idea from the video. What other ways might participants take action on their learning?
3. Determine what actions could be taken as a result of watching the video.

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DISCUSSION NOTES / ADDITIONAL QUESTIONS

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ACTION PLAN

Use this worksheet to create an action plan for implementing what you've learned.

1. Identify three takeaways or themes from the course.
2. For each takeaway/theme, create an action plan to implement your new skills.

TAKEAWAY / THEME 1:

Complete?	Due Date	Action
☐		
☐		
☐		

TAKEAWAY / THEME 2:

Complete?	Due Date	Action
☐		
☐		
☐		

TAKEAWAY / THEME 3:

Complete?	Due Date	Action
☐		
☐		
☐		

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PROGRAM FACILITATOR



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Lisa Ann is a senior leadership consultant and certified executive coach with Inside Out Learning Inc. She has over 30 years of experience as a world-class learning and development professional. She works with training companies as a master trainer delivering programs that ignite, inspire and transform frontline personnel and executive leadership.

Lisa Ann provides training program creation, seminar, and webinar delivery. Her live programs have transformed thousands from frontline personnel to executive leadership. She works with senior level managers across corporate, government and nonprofit organizations to preserve learning and development objectives. Her programs ensure engagement, knowledge transfer, and skill development in a fast-paced, focused environment.

She has designed and delivered programs on topics such as Management Skills, Communication Skills, Emotional Intelligence, Dealing with Difficult People, Resiliency, Content Marketing and Diversity and Inclusion, Unconscious Bias.

Lisa Ann has trained audiences in every state in the U.S.A.; she has also delivered programs in Canada, Australia, and Japan. She facilitates training for organizations such as Seattle City Light, Microsoft Corporation, Clorox University, the U.S. Coast Guard, Touro University, Honda North America, the U.S. / Japanese Air Force, NuScale Power and The Boeing Company.

She will tell you the technical and management expertise gained during her 14-year career at IBM was like earning a Ph.D. She holds master's degree in management, from the Indiana Wesleyan University and completed post-graduate work at Walden University in Management and Decision Sciences. She is a licensed insurance agent and an Amazon best-selling author.

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