

Training content checklist

Examining: Use of standardised materials and practice by training provider

Date of audio recording

Group no.

Observer/s

Trainer

Cycle

Tick session/s included	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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		Goal	Observed + / -		N/A	Observer notes
			Yes	No		
TRAINER	N/A	Standardised training				
		Same Trainer	+	-		
		Pre-course: Facilitator's Handbook provided	+	-		
		Pre-course: Training Outline provided	+	-		
		Trainees trained together (Min. 4 – Max. 5)	+	-		
		Total of 4 hours (<i>delivered in 1 hour sessions</i>) training	+	-		
		General	Yes	No	N/A	Observer notes
TRAINER	ALL	Reminds trainees of the distinction between role during 1:1 and group calls (e.g. suggest 'role of facilitator' is an early topic for the group)	+	-		
		Provides encouragement and builds confidence	+	-		
		Provides constructive feedback	+	-		
		Listens actively and responds to trainees' self-reflection	+	-		
		Models facilitator behaviours during discussions and encourages trainees to reflect and build on these	+	-		
		Core Content	Yes	No	N/A	Observer notes
TRAINER	Session 1	Introduction and the Role of facilitator				
		<ul style="list-style-type: none"> Introduces group to each other and outlines purpose and outline of the training content 	+	-		
		<ul style="list-style-type: none"> Ground rules - Minimum (confidentiality; respect etc) 	+	-		
		<ul style="list-style-type: none"> Group can agree their own (good early topic) 	+	-		
		<ul style="list-style-type: none"> Offers definition of the facilitator role and instigates discussion of the behaviours involved 	+	-		

	<p>Communication skills – Listening</p> <ul style="list-style-type: none"> Facilitates group discussion of key listening skills Emphasises two key components of listening: attention and setting aside assumptions Clearly explains two types of 'listener' 1) talk to think; 2) think to talk. 	+	-		
	Core Content	Yes	No	N/A	Observer notes
Session 1	<ul style="list-style-type: none"> Explains the impact each type can have in a group and suggests making space for this e.g. <i>"that is fascinating; let us take a moment to think and then hear from someone that's not spoken yet"</i>. Suggests encouraging people to speak early on (e.g. roll call) Active listening (e.g. vocal gestures "mm", "uh-huh"). 	+	-		
Session 2	<p>Groups – How they work</p> <ul style="list-style-type: none"> Three levels of need: 1) Task - Purpose of the group; 2) Group; 3) Individual Links facilitator role to responding to and balancing levels of need. Explores examples where the three levels may conflict or compete (e.g. an individual's crisis v planned topic). 	+	-		
	<p>Groups – How they develop</p> <ul style="list-style-type: none"> Explains that groups develop over time and generally experience four stages of development: <ul style="list-style-type: none"> Forming; norming; storming; performing. Reassures trainees the stages can indicate the group is progressing towards performing well. Encourages group to reflect on how this fits their own experience 	+	-		
	<p>Communications skills – Questions</p> <ul style="list-style-type: none"> Explores types of questions (open/closed) and appropriate use 	+	-		
Session 3	<p>Handling conflict</p> <ul style="list-style-type: none"> Experiencing conflict can be healthy for the group. Asks trainees for signs of conflict. Describes the four triggers when the facilitator MUST intervene: 1) Group is breaking up; 2) Comments are personal; 3) Ground rules are being broken; 4) The group is stuck (same argument). Describes the framework for intervening (e.g. acknowledge the conflict; remind about ground rules; acknowledge groups' contributions then hand it back to them to decide how to take it forwards). 	+	-		

	Session 4	Professional and ethical practice <ul style="list-style-type: none"> Getting going ('icebreakers') and finishing up (time keeping; saying goodbye) Equal Opportunities – discuss issues of recruitment, access and inclusion Data Protection – People shouldn't share their personal details. Only at the end in writing. (e.g. exchanging telephone numbers) Confidentiality (e.g. leakage during conversations; Exceptions) Documentation (i.e. different types – recording keeping and note-taking) Allows time for exploring trainees' concerns and issues 	+	-		
		Tailoring	Yes	No	N/A	Observer notes
TRAINER	ALL	Training is tailored in response to observed needs by trainer; or, specific questions from trainees.	+	-		
		Trainer checks understanding. Provides a recap; feeds back on suggestions/ questions and fills knowledge gaps e.g. Q. what if the conversation dries up? A. take it back to the group – “things have dried up does anyone have any suggestions” or “would the group like me to make a suggestion?”).	+	-		
		'Provider skill acquisition'	Yes	Yes	N/A	Observer notes
TRAINER	S1	Invites trainees to talk about existing skills and experience of groups and builds on it	+	-		
		Refers trainees to pre-/post-training exercises within Handbook	+	-		
	ALL	Each Trainee is asked to practice facilitation skills (approx. 10 mins during a session) with a topic provided by trainer.	+	-		
		Trainee invited to reflect on practice session and peers invited to give feedback.	+	-		
		Trainer gives constructive feedback (e.g. suggest what they might have done differently; positive affirmation/ encouragement).	+	-		
		Provider Self-awareness	Yes	No	N/A	Observer notes
TRAINEE	ALL	Reflects on and discusses their own style of communication.	+	-		
		Demonstrates awareness of how their 'style' may impact on the group in relation to the information delivered by the trainer.	+	-		
		Reflects on what they have learned and how they feel about facilitating a telephone group.	+	-		
		Total +				
		Total + or -				
		Percentage correct = items scored + / Total items scored				

Additional notes:

Intervention delivery checklist

Examining: Adherence to content as intended

Date of audio recording

Group no/ cycle

Observer 1:

Volunteer Facilitator

Completion date

Observer 2:

Session:

	Goal	Observed + / -			Observer notes
		Yes	No	N/A	
	Attendance				
Facilitator	Completes Group Calls Register	+	-		
	Checks everyone is still on the call (e.g. roll call exercise) at intervals	+	-		
	Asks participants to let him/her know if they need to leave the call; reminding that they don't have to give a reason.	+	-		
	Session One Only				
Facilitator	Sets group at ease	+	-		
	Gives practical information about how sessions will work, timekeeping, Community Network's role etc.	+	-		
	Allows the group to introduce themselves	+	-		
	Agrees ground rules with the group (suggests and discusses 'core' ground rules and invites other suggestions). Minimum:- i) confidentiality; ii) say name before speaking; iii) stop talking when asked; iv) respect for each other – maximum 5 – 6.	+	-		
	Gets everyone talking early	+	-		
	Models core facilitator behaviour from the beginning – gives group responsibility for leading discussion (e.g. says name before speaking; allows pauses)	+	-		
	For All Sessions				
	Introduction to group call	Yes	No	N/A	Observer notes
Facilitator	Initiates exchange of greetings	+	-		
	Brings people in smoothly	+	-		
	Reminds the group about the ground rules (as necessary in later sessions)	+	-		
	Checks the purpose of the session (or specific topic agreed) with the group	+	-		
	Reminds the group about time limits (e.g. one hour; and Community network time)	+	-		

check - <i>not applicable for later sessions</i>).					
Group content / Facilitation skills		Yes	No	N/A	Observer notes
Builds capacity and resources of the group throughout					
Facilitator	Uses active listening techniques: <ul style="list-style-type: none"> • Pays attention and responds to what is said • Does not lead or steer unless necessary • Gives responsibility to the group wherever possible • Does not intervene unnecessarily • Offers appropriate reassurance e.g. “mm”; “uh-huh” when a participant is talking • Repeats/rephrases to prompt discussion • Uses open questions • Uses summarising statements if appropriate (e.g. transition between topics) 	+	-		
	Encourages quieter participants to join the discussion. e.g. "that is fascinating; let us take a moment to think and then hear from someone who's not spoken yet".	+	-		
	Asks the group's permission before making any suggestions e.g. <i>(would it help if I suggested something or has someone else got an idea?)</i>	+	-		
	Balances the three levels of need (task/group/individual) e.g. individual needs don't dominate group discussion or the wider purpose (task) of the group.	+	-		
	Tailors level of 'facilitation input' to the needs of the group.	+	-		
	Invites the group to respond to questions and uses questions rather than statements	+	-		
	Acts as the guardian of the ground rules	+	-		
	Respects emotional boundaries	+	-		
	Creates a safe environment for sharing, mutual support and learning from others' experiences	+	-		
	Encourages communication and connection	+	-		
	Challenges difficult behaviour	+	-		
	Conveys respect	+	-		
	Helps the group to expand their perspectives and explore alternative choices	+	-		
	Addresses faulty beliefs	+	-		
	Supports good practice and positive beliefs	+	-		
	Acknowledges achievements	+	-		
	Is tactful and supportive over disappointments	+	-		
Handling conflict	Yes	No	N/A	Observer notes	
Allows the group to experience conflict (if it arises) and encourages them to resolve it	+	-			

	Intervenes in <u>any</u> of the following scenarios: <ul style="list-style-type: none"> group starts to break up (e.g. taking sides) ground rule/s is broken it gets personal the group is stuck (in the same argument) 	+	-		
	Is open/ honest and follows a clear process: <ul style="list-style-type: none"> acknowledges the conflict reminds the group of the ground rules acknowledges everyone's contributions gets the group to decide how to move forward keeps everyone involved e.g. "I notice that things are getting heated/ <i>the group seems to be stuck; we need to remember the 'respect' ground rule; thank you all for your contributions, how do you want to take this forward? Let's take a moment and hear from someone who hasn't spoken for a while.</i> "	+	-		
	Session close	Yes	No	N/A	Observer notes
	Reminds the group the session is coming to a close e.g. time check	+	-		
	Summarises the session (including any points/topics for next week)	+	-		
	Provides an opportunity for 'final thoughts'.	+	-		
	Reminds the group of the date and time of the next session	+	-		
	Invites a group "goodbye"	+	-		
	Total +				
	Total + or -				
	Percentage correct = items scored + / Total items scored				

Participants (extent to which the group is 'performing' well)		0 = Never; 1 =seldom; 2 = Sometimes; 3 = Often				Observer notes
		0	1	2	3	
Participant	Participants observe the ground rules e.g. stop when instructed; say their name before speaking					
	Participant/s introduce their own topic/s					
	Participants show mutual support e.g. making suggestions; resolving disagreements themselves; jointly agreeing topics for discussion; offering engagement/support					
	Participants are committed to the group e.g. attend regularly; actively engage; express satisfaction/enjoyment; act on commitments they make to the group					
Total						