



**Department of Education  
Office of Student Financial Assistance**

**Deliverable 31.2.8  
Front 2 Back  
Facilitator Coaching I**

June 30, 2001



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## **Executive Summary**

Student Aid Front 2 Back is the third in a series of core curriculum courses offered by SFA University. The purpose of the course is to help SFA employees and Operating Partners gain a better understanding of the process a student goes through when applying for financial aid, the other “players” in the financial aid industry (Schools, Lenders, Guarantors) and how they interact with one another in support of the student. Additionally, SFA employees and Operating Partners will learn more about the measurements that are being used by SFA to evaluate and improve SFA’s support of the student financial aid process.

A critical element of Student Aid Front 2 Back’s success is adequate preparation of its facilitators. This involves facilitator coaching. Following the formal Train the Trainer course, a facilitator coach observed a number of presenters in the classroom setting. Through this, the facilitator coach noted strengths and areas for development for each presenter, based on his/her classroom performance.

This document contains the core elements of facilitator coaching: the coaching process, key facilitation points, and facilitator coaching materials. In this installment, there are remarks covering the May and June timeframe for delivery of Student Aid Front 2 Back.

## **Facilitator Coaching Process**

Using a standard format, the facilitator coach observed presenters, completed an evaluation of the training session, and spoke with each presenter regarding individual strengths and points for development. Through this, presenters develop an awareness of their existing skills and learn about areas in which they can foster new ones.

The facilitator coach is an expert presenter who is known by each of the presenters. This establishes a high level of comfort and respect through which presenters can develop their skills. While observing a Front 2 Back session, the facilitator coach serves as an observer and is not actively involved or engaged in the class. In this way, his presence is not a distraction, nor does his role alter the course of the session.

As the class progresses, the facilitator coach takes notes regarding the two presenters and, in some cases, the logistics coordinator. After the session, each presenter (and logistics coordinator, where applicable) has the opportunity to discuss these notes with the facilitator coach, elaborating on key points for consideration.



## **Key Facilitation Points**

When observing a training session, the facilitator coach focused on specific areas, techniques, and approaches. These include, but are not limited to, the following presenter behaviors:

- Offers rewards, recognition, and encouragement
- Uses questions effectively
- Speaks clearly, enunciates
- Varies voice tone, volume, and pace
- Moves throughout the classroom
- Listens actively
- Assists participants with individual needs

In addition to these key points, the facilitator coach observes other general presentation skills that address SFA University's branding, such as interactivity and engagement of the audience, polish of facilitators, and support of co-presenters. Session notes reflect appropriate use of these techniques and suggestions for improvement.

## **Facilitator Coaching Materials**

Appendix A includes the standard format for coaching facilitators. For each Front 2 Back session observed, the facilitator coach evaluated each presenter. Additionally, where appropriate, the coach noted suggestions for the logistics coordinator. These reviews are included in Appendices B – F. In these reviews, the facilitator coach observed a training session and noted strengths and areas for improvement for each facilitator. To preserve confidentiality, presenter names have been removed from the enclosed evaluation forms.

This document includes reviews for the following sessions:

- May 15, 2001: Chicago, IL
- May 30, 2001: Washington, D.C.
- June 5, 2001: Washington, D.C.
- June 14, 2001: Washington, D.C.
- June 19, 2001: Washington, D.C.



## **Appendix A:**

### **Facilitator Coaching Standard Format**



***Front 2 Back***  
**Facilitator Feedback Format**  
**Date - Location**

**Opening Summary:**

- Congratulates presenters completing their *Front 2 Back* session.
- Presents overview of beginning of day, including welcomes and set-up.

**Individual Feedback:**

- For each presenter, this section contains chronological observations from the class session in notes format.
- This section also provides suggestions that presenters might try in the future to improve facilitation.

**Presenter A**

- Observations
- Might try this... and *Why*...

**Presenter B**

- Observations
- Might try this... and *Why*...

**Logistics Coordinator**

- Observations
- Might try this... and *Why*...

**Closing Summary:**

- Congratulates team on presenting the *Front 2 Back* session.
- Provides overview of key successes for the day.
- Reminds presenter to consider the points for development as they continue to refine their skills.



**Appendix B:**

**Facilitator Coaching  
May 15, 2001  
Chicago**



***Front 2 Back***  
**Facilitator Feedback**  
**May 15, 2001 - Chicago**

**Opening Summary:**

Congratulations on completing *Front 2 Back Chicago*. On arrival this morning it was obvious that you were all well prepared and ready to begin a professional SFAU class. From the room set up, to your genuine warm welcomes, the class was set up for success before it started. The following are my chronological observations throughout the day and a “*Might Try This & Why...*” section. This section provides “tweaks” to make your next class even better.

**Individual Feedback:**

**Logistics Coordinator**

- *Excellent* preparations (EG. greeting table, audience tables, name tags, A/V, entire room)
- Music playing in background on arrival helped provide an upbeat atmosphere
- *Great* warm/genuine welcome to audience as they arrive.
- Nice self introduction (you should consider becoming a facilitator for the next SFAU class)
- *Great* job helping out with table to table game explanation and playing-high value
- Noticed continual attention to the audience and support of the facilitators
- Really liked you having lunch at a table with participants-perfect DC ambassador

**Might try this...**

Reserving the last two tables in the back of the room to fill front tables first.  
*Why...*minimize the disruption of the latecomers as they arrive during class.



## Presenter A

- Wonderful warm and genuine welcome to audience as they arrive
- Natural hand gestures and terrific appropriate/excited lead off. (Nice contrast to Presenter B and her slightly softer tone)
- Good movement around room is keeping your audience engaged
- Nice relaxed pause as you transition through slides
- Use of individual class names is a nice personal touch
- Good set up of mission possible activity. Showed audience exactly where to start to line up
- Personal points are a very effective way to keep audience engaged. IE. "I worked in a cafeteria in a dorm next door."
- Tended to the tables and helped out during the game
- Great SFAU/DC ambassador
- Good when you chime in and plus up what Presenter B is saying
- Nice connections to SFA mission & previous example
- Used an audience member to explain "reimbursement"-WOW perfect

## Might try this...

Define Ombudsman Office

*Why...* Some don't know what ombudsman means, and won't ask. Builds your credibility as a presenter

Provide examples of a "fun fact" on introductions.

*Why...* it lets your audience know what you're looking for EG. This could be your favorite soft drink, hobbies, something you are proud of etc.)

When you stumble, don't draw attention to the stumble. Move along. Try "I should say"

*Why...* it minimizes stumble, clean delivery

Reference participant guide pages more often "We're on page 6..."

*Why...* keeps audience members on track, shows where you are

Don't hesitate to use SFA service standards to preface your agreements and other actions during the day.

*Why...* reinforce the standards, provide the why of why you reply to questions, start times, etc.



## Presenter B

- Nice opening & introductions of all in room
- Good relaxed tone and pleasant voice inflection
- Nice attention to your fellow facilitator as she facilitates. (Pointing our appendix was helpful, do that more)
- Funny use of sarcasm. “ This is *not* my student loan” -- we’ve all heard that one
- Excellent attention to the tables during the game. “No harm no foul”
- Great SFAU/DC ambassador

## Might try this...

Give a two-minute warning before you start the class

*Why...*Lets your audience prepare to start. Makes a more “crisp” start

In a room this large, I would consolidate & move tables before we got started

*Why...*Brings entire class together and forces interaction between class participants, Latecomers don’t disturb entire class

Not inviting participants to coffee until first break

*Why...*Lose audience at the opening of the program

Set up Student Life game in chunks 1,2,3... (Arrange game board, choose roles, brief administrators)

*Why...*Lose audience on small details, minimize confusion, speed of set up

Don’t hesitate to use SFA service standards to preface your agreements and other actions during the day.

*Why...*reinforce the standards, provide the why of why you reply to questions, start times, etc.

Where you see fit, jump in, comment/plus up when Presenter A has the floor

*Why...* it adds content value, changes pace, switches tone, makes the team look seamless (you just did, added “25%” default rate to Presenter A comments, “We don’t have a fight song” all good stuff)

Use select leaders technique for *Yes and...* activity.

*Why...*audience control, time, fun



**Closing Summary:**

Congratulations to this team on presenting your first *Front 2 Back* class. You should all be proud of the job you did today. Your preparation, professionalism and talent as presenters made the day a success. As you continue to refine your talent, consider the opportunity to incorporate the above *might try* points. Today you have succeeded in presenting a transformational class for SFA & SFA University. Thank you for your hard work. Great job!



**Appendix C:**

**Facilitator Coaching  
May 30, 2001  
Washington, DC**



***Front 2 Back***  
**Facilitator Feedback**  
**May 30, 2001- Washington, DC**

**Opening Summary:**

Congratulations on completing your first Front 2 Back class. On arrival this morning I noticed the signage in the first floor lobby that clearly showed your guests how to get to the class. As I entered the 6<sup>th</sup> floor classroom you were both attending to the participant's tables, engaged with your audience. These details are a critical component of a successful class and were evident as soon as I arrived. - Good job. The following are observations and content points from your class today....

**Individual Feedback:**

**Presenter A**

- Great high energy
- Like when you sit with participants at the table. (Good participation)
- Constantly moving around the room, checking with people
- Might try... giving time left for the game... oops you just did "we'll be just a couple more minutes"
- "Thanks" to audience shows respect for their time & yours. Makes them come back on time in advance- Nice touch
- Nice encouragement of SME's to respond to Presenter B's questions
- Love it when you "chime in" as Presenter B is facilitating
- Great lunch set up at pop quiz
- Really like the way you handled the gentleman in the back. You used his expertise to enhance the class
- Good pacing through the post lunch "kabobs" Apply, Receive, Repay-moved through & explained appropriately
- Might try... having each table clean up table before handing over to Presenter B
- Again, high value in additional comments when talking Case Management
- Might try... breaking up troublemaker out of his table. Would not let him "pass" for entire table on activities. (What I do section)
- Might try...Cranking up the video's for more impact
- Nice job on the Mod & Transformation piece



## Presenter B

- Good attention to tables and participants
- Have a sharp polished look
- Might try...smiling more often
- Good use of game board (holding the board up)
- Excellent reference to page numbers, keeps audience on track
- Natural, effective hand gestures
- Great job asking questions of audience
- “You can take notes” if you’d like- perfect
- Who’s behind the Internet- Vice President joke- *brilliant*
- Might try... writing a little larger on flip chart. Tough to see in the back of the room
- Like you using autobiography... “ I used to be a financial aid counselor...” – builds your credibility
- “Presenter A’s going to talk about this” leaves the audience with anticipation for Presenter A’s - perfect. Makes you sound like more of a team
- Great & appropriate sense of humor! “Don’t just sit there and wait for lunch.”
- Like the “we” vs. “I” when discussing topics
- Might try... ask a question and let it sit. Count to five slowly to get a response from audience instead of giving them the answer.
- Great job asking audience members to repeat tapped SME in audience!!!!
- Standing ovation stretch worked well
- Might try selecting a leader for the “yes and” activity & giving an example or two before you get started
- Nice handwriting, applause was brilliant
- Might try... breaking up troublemaker out of his table. Would not let him “pass” for entire table on activities. (What I do section)
- Might try...Cranking up the video’s for more impact

## Closing Summary:

You all did a very effective job with a quiet (and potentially tough) audience. From “Front 2 Back” your interaction with each other and the audience was professional, informative, and high energy. All five points of SFAU training *brand* were evident in your presentation. Today you were all wonderful ambassadors for SFAU.

- Congratulations



**Appendix D:**

**Facilitator Coaching  
June 5, 2001  
Washington, DC**



***Front 2 Back***  
**Facilitator Feedback**  
**June 5, 2001 - Washington D.C.**

**Opening Summary:**

Congratulations to you all on completing your first SFA Front 2 Back classes. The following are my observations of your class today.

**Individual Feedback:**

**Presenter A**

- Nice smile and sharp look. Professional
- Very good attention to the tables & help explaining the player card activity
- Much better movement around the room! Good job with the remote- it wasn't seamless but much higher value having you move around the room
- "Are we all in agreement on these steps" - Nice
- Better voice pacing in the afternoon, good attention to all the tables as you spoke
- Perfect pacing through the "kabobs"- didn't linger
- Yes and activity... excellent attention to the tables... (Especially table 1 "do I need to feed you candy")
- "What does inequity mean" - brilliant way to help audience understand what others are saying.
- Your conversational tone improved as the day progressed. Less choppy/scripted



## Presenter B

- Like asking for applause- keeps energy high in the room (not to much @ end of activities)
- Like the way you use autobiography “ I thought the answer was”
- Pop up quiz went well- good enthusiasm, communicates info, lots of laughter
- Try...setting up the quiz 1. Here comes a pop quiz 2. If you know the answer stand up or pop up. 3 If you get the answer right you get a prize
- Nice job allowing the audience SME’s answer questions- Try thanking the person who volunteered the info (IE. FFASA on the web info)
- It’s ok to read from notes for the player card activity to make sure you get things correct.
- Try prefacing your lunch activity by explaining that we have lot of material to cover so we would like you to have a working lunch
- Try moving around the room
- The countdown after lunch... four minutes. Lets people get prepared to start.
- “Feel free to jump in”- and they did!
- Good call to take a break to mic up - nice to stretch and flex after lunch
- Yes and activity...better set up than POP quiz. Like the way you numbered the tables
- Yes and... asked the team that was presenting
- “This is a dictatorship and I’m the dictator”- funny and appropriate
- Lets everybody give each other a nice round of applause- good energy
- What about me activity needs more direction. How do I share things at my table?

## Logistics Coordinator:

- Seamless
- Incredible attention to details IE music, signage, lunch.... etc.
- Gracious to all audience members and facilitators
- Positive and upbeat keeps energy high in the room
- *Please* audition for future SFA classes
- Leading applause

New script, affect of presenters, not getting side tracked on personal stories, tough content



**Appendix E:**

**Facilitator Coaching  
June 14, 2001  
Washington, DC**



***Front 2 Back***  
**Facilitator Feedback**  
**June 14, 2001 - Washington, D.C.**

**Opening Summary:**

Congratulations on completing your first Front 2 Back class. On arrival this morning I noticed the signage in the first floor lobby that clearly showed your guests how to get to the class. As I entered the 6<sup>th</sup> floor classroom you were both attending to the participant's tables, engaged with your audience. These details are a critical component of a successful class and were evident as soon as I arrived. - Good job. The following are observations and content points from your class today....

**Individual Feedback:**

**Presenter A**

- Good attention to the tables as Presenter B was working activity/facilitating
- Pauses are very ok when you transition from slide to slide
- Nice smile
- Might try...recognizing and validating the expertise of each audience members (during dependent vs. independent)
- You seemed to have "warmed up"
- Might try... walking around the room with the remote
- Great smile... face lights up
- Might try being more directive, lunch is ready... all rise...stop activities briskly.
- Funny use of sarcasm, "I know that you all are going to love that"
- Might try... don't discourage audience from writing... some learn that way
- Good pacing through kabobs
- Might try... after each kabob commenting on content using autobiography
- Might try moving around the classroom (even more important after lunch)
- Lost you on "do you know what it means to book a loan?" What was the answer?
- Might try... working off each other as you facilitate. I.E plus up the kabobs
- Might try... inviting your audience to have a seat.
- Good recap of "What we do"
- Might try...repeating the responses from your audience, then validate/argue point
- Noticing natural hand motions
- Might try... number activity, explanations of why we did this.
- Might try... measurement activity, actually all activities should get more direction on what to do & how to do it.
- Again great smile... plus up when your audience gives you responses.



## Presenter B

- Very pleasant voice tone... soothing and caring.
- Using the words “What we’d like for you to do” & “I’d like for you to start, right now” very effective to get buy in from your audience.
- Time expectations for your audience “take another minute” helps your audience stay on track -- good job
- Might try... setting up what to look for in each comparison
- Good positive reinforcement as you harvested/facilitated information from your audience “all excellent points”- shows other audience members you want their participation
- Might try... hold audiences attention before you allow them to begin activity, explain first
- Might try...working off each other as you facilitate
- Might try...set up of “yes and” ...activity try 1,2,3, set up. Try more direction to the tables
- Might try...walking around the room more!
- Might try...more explanation of measurement exercise. Try 1.2.3. Technique
  1. Pick a leader
  2. Leader read the exercise
  3. Leader harvest info from your table
- Might try... when picking a table, pick a person at the table, tough to find a volunteer, slows things down
- Might try mixing group up again to avoid the “chatter” going on in the back of the room
- Good reference to page numbers. Focuses the audience attention
- Nice touch on the thank you of the audience

## Closing Summary:

As you both continue to facilitate this class both of you will become more familiar with the content of the class. As we become more familiar with the content and how it is played out we will get better at presenting the class. As a whole your audience seemed to both enjoy and understand your Front 2 Back class. Congratulations to both of you.



**Appendix F:**

**Facilitator Coaching  
June 19, 2001  
Washington, DC**



**Front 2 Back  
Facilitator Feedback  
June 19, 2001 - Washington, DC**

**Opening Summary:**

Congratulations on completing your first Front 2 Back class! On arrival this morning I noticed the signage in the first floor lobby that clearly showed your guests how to get to the class. As I entered the 6<sup>th</sup> floor classroom you were both attending to the participant's tables, engaged with your audience. These details are a critical component of a successful class and were evident as soon as I arrived. - Good job. The following are observations and content points from your class today....

**Individual Feedback:**

**Presenter A**

- Excellent energy!
- Good voice inflection, natural hand gestures, motions to slides
- Room is tight...but you moved around the room- do it more
- Moving along through the slides at a good pace
- *Cognoscente* is a good word
- Really good explanation of SAR award and needs based programs
- FSEOG good explanation of acronyms FFEL
- Quarried the audience at a perfect time - I get the sense that you really know your stuff
- Again, perfect questions for audience
- "Thanks Presenter B"- facilitator frosting/polish
- Might try... to work off each other more - jump in when you can
- Nice set up for "Yes And..." activity. Assigned tables nicely. Worked the groups really well - great timing. You guys really carried the part. Best I've seen that activity go.
- Like your use of autobiography - I'm a part of the schools channel...
- Better movement around the room at the end of the day
- Explanation of COD, MOD, & Transformation was terrific.
- Great tie in on tennis ball activity - It's all about Mission, Process & Measurement
- End of the afternoon is loooong. Kept pace moving



## Presenter B

- Good attention to your fellow facilitator
- Nice transition from Presenter A
- Picked up right after Presenter A stopped - no loss of energy
- Good voice tone, pacing, and volume
- Went right into game directions - explained *very* well (chunked directions)... One task at a time
- Excellent attention to the tables!
- Count down after break - “We’re going to start in a minute”
- Good voice volume & pacing through the “kabobs”
- Good movement around the room
- Might try... to work off each other more...
- It’s important to examine our perceptions... good point...
- Nice pause as you transition to the performance plan
- Choosing members of the class to answer measurement worksheet questions was an effective way to keep all engaged at the end of the day

## Closing Summary:

Again, congratulations on completing a very successful Front 2 Back class. You both did a wonderful job facilitating. Today you were all wonderful ambassadors for SFAU.