**ReMIS**

**Facilitator Feedback Form**

**[Date]**

1. Participant Engagement

Level of Proficiency:

Notes:

2. Introduction

Level of Proficiency:

Notes:

3. Presentation and Facilitation Skills

Level of Proficiency

Notes:

4. Questioning Skills

Level of Proficiency:

Notes:

5. Learning Exercises

Level of Proficiency:

Notes:

6. Feedback

Level of Proficiency:

Notes:

7. Evaluate Performance

Level of Proficiency:

Notes:

8. Closing

Level of Proficiency:

Notes:

9. Use of Training Materials and Technology

Level of Proficiency:

Notes:

10. Preparation

Level of Proficiency:

Notes:

11. Effective Communication

Level of Proficiency:

Notes:

12. Classroom Management

Level of Proficiency:

Notes:

13. Professional Credibility

Level of Proficiency:

Notes:

14. Ethical and Legal Standards

Level of Proficiency:

Notes:

**Facilitator Observation Criteria**

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| **ITEM NUMBER** | **EXPERT** | **PROFICIENT** | **NOVICE** | **NEEDS DEVELOPMENT** |
| **1. Participant Engagement** | Captured participants’ attention by presenting a realistic situation they may encounter in their operational environment and showed how the learning objective will resolve the problem; sustained motivation by providing opportunities for participants to participate and succeed; exhibited enthusiasm for learning content; provided timely and meaningful feedback that sustained participants' interest. Clearly demonstrated an openness and desire for trainee interaction, engagement and success. | Captured participants’ attention by informing them of the benefits of the instruction and relevance to job performance; informed participants of the risks to job performance if the participants could not reach the learning objective; exhibited enthusiasm for learning content. | Gave participants a reason to reach the learning objective and indicated some of the risks associated with job performance if the participants could not reach the objective. | Did not observe any of the criteria. |
| **2. Introduction** | Provided an agenda when applicable; queried participants to recall prior learning or knowledge that supported the lesson; lesson objectives were stated in words the participants understood. | Provided an agenda when applicable; informed participants how the lesson ties into existing or  prior knowledge. | Provided an agenda when applicable, but did not tie lesson into existing knowledge. | Did not meet any of the criteria. |
| **3. Presentation and Facilitation Skills** | Adapted presentation/facilitation to learners needs and involved participants through discussion, questions and reflection. Drew on the participants experiences and knowledge; promoted interaction with and between participants; kept the learning focused on the goals; encouraged and supported collaboration among participants to allow participants to share experiences and learn from one another. Demonstrated a willingness to use a variety of approaches, methods or strategies to engage as many trainees as possible. | Explained all teaching points in the lesson plan, presenting content in a variety of ways. Facilitated participants’ understanding with use of related anecdotes, analogies or examples that were relevant. Drew on the participants’ experiences and knowledge; promoted interaction with and between participants; provided clear directions for activities and kept participants focused on learning goals during the activity. | Explained most of the teaching points in the lesson plan. Attempted to facilitate participants’ understanding with the use of anecdotes, analogies or examples. Presented instruction with minimal references to participants’ experiences and knowledge; did not  provide opportunities for interaction with and among participants. | Did not meet any of the criteria. |
| **4. Questioning Skills** | Conducted participant checks using a variety of question types, as appropriate. Consistently verified participants were engaged and understood the material through the use of informal checks on learning. Always explored participant understanding by asking varied, relevant questions. Directed and redirected questions effectively to promote learning; assessed participant learning and asked appropriate follow-up questions when wrong answers were given. Demonstrated active listening to all trainees by following through in real time on both questions and answers. | Conducted participant checks in the lesson plan. Usually used questions to explore clarity, relevance, understanding and significance of participant comments. Sometimes engaged participants in dialogue when wrong answers were given. Provided opportunities for most participants to participate in discussion. | Occasionally conducted participant checks in the lesson plan; sometimes used questions to explore clarity, relevance, or significance of participant comments. Did not engage participants in dialogue when wrong answers were given. Provided few opportunities for participants to participate in discussion. | Did not meet any of the criteria. |
| **5. Learning Exercises** | Stated the objectives of the practice; provided clear instructions to participants; constantly observed participants’ progress and consistently measured participant progress toward the objective; guided  participants (as necessary) by questioning participant strategies and providing directive feedback. Provided practice/practice exercises that were increasingly complex (as necessary); identified areas where participants require additional practice. Provided clear concise instructions for demonstrations when applicable. | Stated the objectives of the practice; provided instructions to participants; observed participants’ progress and occasionally measured participant progress toward the objective; guided participants (as necessary) by providing directive feedback. Provided clear concise instructions for demonstrations when applicable. | Stated the objectives of the practice/ PEs; provided instructions to participants; observed participants’ progress. Lacked complete instructions that left participants with questions on the demonstrations when applicable. | Did not meet any of the criteria. |
| **6. Feedback** | Provided participants with opportunity to ask questions; always acknowledged participant, and either responded in a clear, concise way, addressed the  question and clarified the teaching point or set a time to resume conversation with the participant. Response was tactful and timely. Recognized signs  that some participants needed clarification and addressed the issue (lack of involvement, attention and comprehension). | Provided participants with opportunity to ask questions and usually acknowledged participant comments/questions; responded in a clear, concise way; response was tactful and timely. | Occasionally acknowledged participant comments or questions; most of the responses were clear and  tactful. | Did not meet any of the criteria. |
| **7. Evaluate Performance** | Clearly stated objectives of the learning activity in words the participants could understand. Provided clear instructions and communicated assessment instruments to participants (deadlines, rubrics, scoring criteria). Participants are informed when formal and informal evaluation of objectives will take place. Constantly observed participants’ progress and consistently measured class progress towards the objective. Facilitated learning through  constructive feedback and provided opportunities for remediation. Elicited participants’ reflections/discoveries. Verified comprehension through group and individual questions. | Stated objectives of the learning activity; provided clear explanation of assessment instruments. Observed participants’ progress and occasionally measured class progress towards the objective. Participants are informed when formal and informal evaluation of objectives will take place. Facilitated learning through constructive feedback but rarely provided opportunities for remediation. | Stated objectives of the learning activity and provided minimal instructions on use of assessment instruments. Participants are not informed when formal and informal evaluation of objectives will take place. Occasionally attempted to initiate discussions with participants to assess their progress. | Did not meet any of the criteria. |
| **8. Closing** | Provided summary using all three elements (Review, Question, and Transition); used different examples from those used in the initial instruction, or specifically referenced participant discoveries. Avoided being excessively long with the summary and established another time to address individual questions (as necessary). Provided opportunity for participants to explore ways to use what they learned in increasingly complex scenarios. Encouraged trainees to share discoveries that would help in summarizing. | Thoroughly addressed all three elements in the Summary. Review: Wrapped up and  reviewed the main points. Avoided reteaching. Question: Solicited participant questions; addressed  participants’ questions. Transition: Linked this training to follow-on training and job environment.  Advised or reminded participants of materials or necessary preparation for follow-on training. | Hastily addressed all three elements; Read the learning objectives and simply asked “Are there any questions?”; provided minimal transition of content to participant‘s job environment and follow-on training. | Did not meet any of the criteria. |
| **9. Use of Training Materials and Technology** | Instruction/learning was clearly enhanced through imaginative and/or innovative use of training materials and technology. All non-Federal anecdotes/stories should be derived from public information. Used visual aids (flipchart, real physical examples, appropriate games, NARA website, YouTube, etc.) that supported the objectives; explained the use of technology to participants as necessary; was proficient in using the technology. Able to troubleshoot or fix minor technical problems. Demonstrated a sensitivity and ability to reduce potential distractions. | Instruction was generally effective and not degraded by improper use of training materials and technology. Materials were appropriate in number and supported the objective. All non-Federal anecdotes/stories should be derived from public information. Media was in synch with the presentation. Equipment was functional and minor problems were resolved effectively. | Use of technology and training materials sometimes enhanced the instruction; the instructor was not familiar with the technology and materials resulting in loss of training time. | Did not meet any of the criteria. |
| **10. Preparation** | Was prepared for lesson (necessary resources, supplies, reference materials and equipment were available and functioning). Was very knowledgeable with content and could reference specific material in lessons when needed; anticipated potential areas of participant difficulty and was prepared to use additional questions, content, examples and/or different strategies to aid learning. Demonstrated unflappable confidence and assurance when presented with the inevitable snafus. | Appeared prepared for lesson (necessary resources, supplies, reference materials and equipment were available and functioning); additional resources (examples, information) were available for complex content; content was organized for effective presentation. Classroom/learning environment was organized, set up and ready for training. | Occasionally seemed unfamiliar with parts of the lesson and supporting materials; used lesson plan  extensively and displayed some hesitation referring to materials or using equipment. | Did not meet any of the criteria. |
| **11. Effective Communication** | Used a variety of appropriate written, oral, and body language to convey content. Demonstrated mastery of active listening skills (nod, eye contact, etc.) to communicate clearly; was non-repetitive. Paraphrased comments and questions to show understanding. Acknowledged diverse perspectives and used language that was appropriate for learning content and audience. Demonstrated an eagerness to honestly and fully communicate with trainees. | Used clear voice; varied the volume, tone and rate of speech for appropriate effect. Pronunciation was clear and used appropriate vocabulary and proper grammar. Faced the audience; maintained eye  contact; did not block views of training materials. Avoided excessive distracting mannerisms. Acknowledged and responded to participants’ diverse perspectives. | Used a clear voice and pronunciation was accurate; some variety in communications skills; Sometimes  blocked views of training materials and was repetitive. Occasionally seemed uncomfortable with  discussions to gain participants’ perspectives. | Did not meet any of the criteria. |
| **12. Classroom Management** | Conducted introductions at the beginning of course (much of this introductory material appears in the Instructor Guides); established routine, ground rules and expectations with participants. Understood and addressed undesirable behavior effectively, appropriately and on an individual level. Managed individual and group-paced participation avoiding inappropriate digressions; provided a safe and positive learning environment. Respected diverse ways of being. | Conducted introductions at the beginning of course. Demonstrated an awareness of the class by not doing the exact same introduction if the exact same group was in the previous class. Established ground rules and expectations with participants.  Understood and addressed undesirable behavior effectively and appropriately. Provided a safe learning environment. Respected diverse ways of being. | Conducted introductions at the beginning of course; established ground rules but did not allow for  participant discussion of their expectations. Hesitated in addressing undesirable behavior. | Did not meet any of the criteria. |
| **13. Professional Credibility** | Modeled exemplary professional conduct (presentation, dress, communication). Demonstrated confidence and exceptional subject matter expertise to provide accurate answers. Respected the values, ideas, and opinions of others and provided a learning environment that was open, engaging, and interactive. Planned/modified instruction to accommodate learners and related instruction with current records management issues and specific agencies' concerns. | Modeled exemplary professional conduct. Demonstrated preparation and subject matter expertise by answering most questions adequately; showed respect for values and opinions of others. Provided an engaging learning environment and accommodated various participants learning needs/styles. Related instruction with some current records management issues and specific agencies' concerns. | Professional conduct was limited. Demonstrated limited subject matter expertise; delayed answering some questions to a later time or inadequately answered them. Demonstrated difficulty diverging from lesson plan content, presenting information in an engaging manner, and accommodating participants' various learning needs. Was respectful of participants but hesitant to accept news ideas or approaches. Lacked thorough knowledge of up-to-date records management issues, trends and specific agencies' concerns. | Did not meet any of the criteria. |
| **14. Ethical and Legal Standards** | Respected participant confidentiality, anonymity, and rights; avoided real or perceived conflicts of interest. Treated participants equally and fairly; protected participants PII. Demonstrated knowledge and compliance of copyright laws. Encouraged trainees to engage in excellent ethical conduct while performing their Records Management duties upon returning to their agencies. | Respected participant confidentiality, anonymity and rights; avoided conflicts of interest with participants;  protected participants PII. Complied with copyright laws. | Demonstrated qualities (demeanor and appearance)  expected of an Instructor; treated participants equally and fairly and was respectful of  participants’ rights. Could not always provide justification for use of copyrighted materials. | Did not meet any of the criteria. |