

Connection Facilitator Procedures, Forms & Reporting Requirements: Checklist



ADVANCE REQUIREMENTS CHECKLIST			
Report/Action	Who is responsible?	When?	Why?
<u>Host Organisation Responsibilities document</u> is forwarded to the host organisation and is understood by the host organisation. Set up and roles are agreed.	Facilitator (FME is the host organisation for FME organised training)	At least 2-weeks in advance of training	Ensures that the host organisation is clear of their role, particularly in relation to participant safety and required standards of hosting a Connection Link Life Online Session.
Participant registration takes place	Host organisation is responsible and ensures that registration creates an opportunity to comply with the <u>Participant Suitability Guidelines</u> and <u>Participant agreement</u>	At participant registration	<ul style="list-style-type: none"> • Communication • Safety • Standards • Data handling
Send payment to Fresh Minds Education to register your course participants and to give them access to the course resources.	Facilitator <u>Connections Fee (Non-Profit Plan)</u> <u>Connections Fee (Supporters Plan)</u> or email <u>finance@freshmindseducation.com</u> if you need an invoice set up	In advance of delivering the course	To ensure FME are reimbursed for access to the programme materials, workbooks, cert, admin and costs of maintaining the facilitator network.
Host organisation sends Participation Registration and Zoom details to Facilitator and ensures the participants have the zoom link.	Host Organisation	At least 24hrs before training	Enables facilitators to; <ol style="list-style-type: none"> 1. Become familiarised with the participants who will be attending 2. Check registration & complete attendance sheet 3. Respond to no shows and incidences as required
Facilitators meet to plan to ensure that everyone feels confident in their role and use of technology.	Facilitator Team	Prior to session – at least 3-days in advance	Preparation

DURING THE SESSION CHECKLIST

Report/Action	Who is responsible?	When?	Why?
<p>Zoom Set Up See How To Zoom Guide for instructions and help. Click Here</p> <p>FME Fac Only: are required to use the standardised FME backdrop during zoom.</p>	<p>All facilitators regardless of role.</p>	<p>Before sessions begin</p>	<ul style="list-style-type: none"> • To be prepared & set up. • Zoom backdrops are important for org. branding – feeling connected.
<p>Complete registration</p> <ol style="list-style-type: none"> 1. Check your registration list on participant arrival. <ul style="list-style-type: none"> • Complete the Connections LLO Attendance Proforma • FME Fac Only: Highlight non attendees on registration list in red. 2. Please always ensure you are complying with max and minimum guidelines-stop admittance after max numbers have been reached. 3. For any participant who fails to show contact using text anywhere app. See How To Text Anywhere Guide for instructions and help. Click Here 4. If any attendee arrives and is not on the registration list, they must complete registration before commencing the session. See Connections LLO Unregistered Participant Proforma 5. The screen facilitator must register participants by phone and must ensure to use the withheld number facility on their phone. See How To Withhold number Guide for instructions and help. Click Here 	<p>Chat Facilitator</p>	<p>Start of session</p>	<ul style="list-style-type: none"> • Data collection • Safety

Monitoring Form - **** IMPORTANT**** <ul style="list-style-type: none"> Ensure that all participants complete monitoring once admitted. Click here for form; https://www.surveymonkey.co.uk/r/2T9KVYR 	Chat Facilitator	Start of session	Funding Requirement
Incidents <ul style="list-style-type: none"> During the session if someone a) leaves the screen without giving a reason, or if you b) need to intervene or support someone. Click Here to follow suicide intervention protocol. 	Chat Facilitator	During session	Safety
Poll (Optional) <ul style="list-style-type: none"> At the end of your session 'Poll'. See <i>How To Poll Guide</i> for instructions and help. Click Here 	Screen Facilitator	End of session	Feedback
Screenshot <ul style="list-style-type: none"> FME Fac Only: Facilitator screenshot from Zoom – permissions have already been sought but check again out of courtesy 	Screen Facilitator	End of session	Promotion
Participant Evaluation <ul style="list-style-type: none"> Ask your participants to complete the evaluation Click here for form https://www.surveymonkey.co.uk/r/LTQHLDY 	Screen Facilitator	End of session	Feedback
Export Chat <ul style="list-style-type: none"> Before you end your session export chat from Zoom. See <i>How To Export Zoom Chat</i> for instructions and help. Click Here 	Chat Facilitator	End of session	Quality Assurance / Compliance

IMMEDIATELY AFTER THE SESSION

Report/Action	Who is responsible?	When?	Why?
<p>Email the following items to helen@freshmindseducation.com</p> <ul style="list-style-type: none"> • Poll (optional) • Registration form • FME FAC: Return FME excel sheet • External Fac: Return <i>Connections LLO Participant Attendance Proforma</i>. Click Here • Screenshot Group Photo (FME FAC Only) • Exported zoom chat (FME FAC Only) • Invoices/expenses form (FME FAC Only) • Critical Incident Reports (FME FAC Only) <p>Subject Line of email</p> <ul style="list-style-type: none"> • Date time of workshop and names of facilitators. E.g. 12/1/21. 7pm. LauraFlack-JoeBlack-AdamWalsh 	Chat Facilitator	Immediately after session is over. It is a requirement that no facilitator leaves the session until this is completed.	Promotions – this is very important to FME to showcase our work with people. GDPR Registration Data Management Compliance
<p>Facilitator's report</p> <ul style="list-style-type: none"> • Return <i>Facilitator report</i> Click here for form https://www.surveymonkey.co.uk/r/FBSVQL8 	Screen Facilitator	Immediately after session is over. It is a requirement that no facilitator leaves the session until this is completed.	Review and Planning
<p>Invoicing</p> <ul style="list-style-type: none"> • FME FAC Only: Submit expenses form or Invoice if paid for role to finance@freshmindseducation.com 	Individual facilitators as per individual agreements	After session	Paid
<p>Removal of Data</p> <ul style="list-style-type: none"> • It is a legal requirement for all data pertaining to this workshop to be deleted from your devices. Including names, numbers, written data, photographs and recordings. • Be aware that any sharing on social media MUST come from FME. You are welcome to and we would encourage you too, share FME posts. 	Every facilitator	End of Session	GDPR

FOLLOW UP AFTER THE SESSION

Report/Action	Who is responsible?	When?	Why?
<p>Flag with FME Office 07921861104</p> <ul style="list-style-type: none"> • Anticipation of incidents that could result in a complaint • FME Fac only: Critical Incidents • All Facilitators: Please call FME offices if there has been anything that has happened that could compromise FME or that you believe FME would need to know about as it may affect or impact FME publicly, or anything of a sensitive nature. 	Facilitators	Immediately	Public Relations Safety
<p>AFTER YOU ARE DONE -WHAT DOES FME DO?</p> <ul style="list-style-type: none"> • FME will email the participants their workbooks and certificates within 3- 10days. The registration form will be used to do this. • FME will email facilitators the participant evaluation feedback from the sessions. 	FME	3-10 days after	Recognition Follow up Closing