



# Facilitation Financial Education *Training Dynamics*

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# Introductions

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# Agenda

- Elements of great workshops/classes
  - Preparation and logistic tips
  - Audience
  - Environment
  - Tips and Tools
  - Evaluation
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What are our group guidelines?

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What takes a workshop/class  
from good to great?

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# Great Workshops

- Preparation
  - Know your audience
  - Create the environment
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# Preparation

- Logistics
  - Materials
  - Set-up
  - Double-check
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# Example Prep Worksheet

Time	Logistics	Preparation	Modeling
2:00	Room A/B  Greet attendees at the door as they come in and direct them to pick a seat and write their name on a table tent.	<i>Set-up powerpoint, 2 flip charts, table tents in front of seats, markers, toys, handouts at front, and business cards up front.</i>	Importance of prep
2:15	Welcome and Introduction by Board Member	<i>Bio and session description on hand</i>	
2:18-2:25	Introductions - have each person tell their name, organization, and expectation or why they chose this session	<i>Prepare a flip chart for the expectations</i>	Value of workshop/training
	Housekeeping and Group Guidelines	<i>Prepare a group guideline flip chart</i>	Popcorn - class techniques

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# Know Your Audience

- Keep learning styles in mind while preparing
    - Visual
    - Auditory
    - Kinesthetic/Tactile
  - Knowledge and skill level
  - Age appropriate materials
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# Create Your Environment

- Classroom style
  - Set up can facilitate group bonding and dialogue
  - Amenities
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# Tips and Tools

- Ice breakers
    - Fit into learning goals
    - Time frame
    - Fun!
  - Trainer tools
    - Flip charts – Prep in advance
    - Blue wall
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# Tips and Tools

- Games and Activities
    - Role play
    - Small group projects
    - Scenarios
    - Jeopardy
  - Curricula
    - Plenty out there
    - Make your own
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# Evaluation

- Written
  - Verbal – pluses and wishes
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