HOW TO BE AN EFFECTIVE FACILITATOR CHECKLIST

☐ Be prepared
  o Understand goals of group
  o Be familiar with the subject matter
  o Come with discussion questions
  o Anticipate participant questions or thought processes

☐ Set a relaxed and open tone
  o Welcome everyone
  o Provide refreshments
  o Use humor
  o Focus on differences in opinion, not in personality

☐ Establish clear ground rules with the consensus of the participants
  o Mutual respect and openness
  o Spirit of collaboration and listening
  o Encourage participation from all
  o No personal attacks over differences in opinion
  o Maintain confidentiality to encourage openness

☐ Identify the goal or purpose
  o Know why you are there
  o Review the agenda with the participants, ask for feedback and make adjustments

☐ Facilitate interaction
  o Guide discussion based on ground rules while remaining neutral
  o Keep group focused on topic
  o Monitor communication
  o Consider small groups for more open communication
  o Only intervene when it is clear that the group is widely off-topic
  o Allow participants to respond to each other’s questions first
  o Allow the group to have a moment of silence after you ask a question
  o Involve everyone
  o Reestablish ground rules if discussion turns into debate

☐ Help the group with content
  o Consider a wide range of views with pros and cons
  o Ponder what values & concerns influence the group’s beliefs
  o Summarize the discussion as it moves along
  o Identify common ground
- Make the discussion productive by asking follow up questions

☐ Reserve adequate time – at least 20 minutes – for closing
  - End on a positive note
  - Ask for final comments/questions
  - Ask for new ideas stemming from the discussion
  - Remind the group of the next meeting and its tentative agenda
  - Thank everyone for contributing
  - Acknowledge difficulties & hard work
  - Evaluate the group’s effort

Effective facilitators:
- Ask, don’t tell
- Compliment individuals personally
- Build relationships by moving away from being constantly task-oriented
- Initiate the conversation
- Ask for opinions, rather than offering own
- Listen without interrupting
- Are empathetic
- Draw energy from the group and activities
- Build on intuition, not just facts
- Look people in the eye
- Are persuasive, enthusiastic, and outgoing
- Act like a counselor or a coach
- Have a sense of curiosity about people
- Keep the big picture in mind while working on the details