**The Facilitator’s Role**

An effective facilitator plays a critical role in the following areas:

* Design and plan
  + Provide a process and tools to ensure a productive group and desired outcomes are achieved
  + Establish ground rules for interaction, create meaningful agendas, identify and communicate objectives
* Guide and control
  + Provide structure and strategic direction to the discussion
  + Ensure participation from all group members, mutual understanding, and shared responsibility to achieve outcomes
* Record and take action
  + Record group feedback
  + Compile and communicate outcomes to leadership
  + Follow through on action items

| Attributes of effective facilitators | |
| --- | --- |
| Be objective | Provide criteria, give and receive feedback, test assumptions, collect all ideas and summarize clearly |
| Take a neutral stance | Ask questions, offer suggestions, and take off the facilitator hat when needed |
| Focus on the process | Practice active listening, ask questions, paraphrase to clarify, synthesize ideas, stay on track, and use time wisely |
| Understand desired outcomes | Get clarity from leadership, provide parameters to the group, and develop a shared vision |
| Manage time | Be realistic about what you can accomplish given your resource and time constraints and be ambitious and realistic in setting goals and expectations |
| Show compassion | Acknowledge emotionally charged individuals and their contribution and practice patience in allowing them to express themselves while still maintaining momentum and focus |

**Designing an Agenda**

When designing an agenda, ask yourself what a successful session looks like. Consider the following factors when creating a meaningful agenda:

* Know your audience
* Identify topics and order of items
* Allocate time and resources
* Assign roles and responsibilities
* Provide preparatory materials

**Planning the Process**

When planning the workshop, select an appropriate location that is familiar and comfortable and ensure that the facility will accommodate all participants easily. Design the table and chair arrangements in a way that will encourage participant involvement. Other logistical considerations include the use of white boards or flip charts, sticky notes and pens, technical requirements, and name tags.

Establish ground rules for effective communication. This will provide a framework to ensure open and respectful dialogue and to maximize participation. Allowing participants to develop the ground rules ensures buy-in and begins their engagement process.

Common workshop ground rules include:

* Let one person speak at a time
* Listen respectfully to what others have to say
* Refrain from criticizing differing opinions
* Respect all participants
* Actively participate
* Be open to all ideas

**Effective Communication Strategies**

The facilitator plays a critical role in keeping all participants involved and in ensuring the conversation keeps moving. Consider the following types of questions to keep participants engaged:

* Closed questions – can be answered with a single word or phrase
  + *Does the data resonate with your experiences or observations?*
* Open questions – elicit a longer answer and asks participants to think and reflect.
  + *How would you improve employee satisfaction in your IC?*
* Fact-finding questions – gives facts and ensures the group has relevant information to move forward
  + *What training and professional development programs are currently available?*
* Feel-finding questions – gives you perceptions and personal experiences and helps the group focus on the impact of actions
  + *How do you feel about the quality of trainings provided?*
* Best-least questions – can provide information on how aligned or varied the group is in their opinions and perspectives
  + *What is the best/worst thing about our training programs?*
* Tell-me-more questions – allows participants to clarify and expand on their comments
  + *Can you elaborate on that?*
* Third-party questions – provides an opportunity to test assumptions
  + *Employee survey data shows that only 10% of employees are satisfied with available training opportunities, would you agree with that assessment based on your experience and conversations with others?*
* Magic-wand questions – helps brainstorm innovative solutions that are beyond established norms
  + *If you were creating a new training program with unlimited resources, what type of program would you create?*

**Language of Facilitation**

As a facilitator, it is important to be able to accurately and precisely summarize and paraphrase participant comments without missing key points. Check perceptions of participants by keeping an eye on verbal and non-verbal cues that may indicate tension in the group, identify feelings and to check the energy of the group. It is important to be responsive to individual participant needs. The facilitator may need to remind participants of the ground rules if unintended behavior is hindering progress.

Working groups inherently consist of varied personalities so it is important to equip yourself with strategies to manage conflict by diffusing the situation and keeping the group focused on the goals of the session. Approach the situation with a calm, objective, and neutral viewpoint. Below are some tips on how to deal with different personality types:

* Dealing with the complainer – finds faults
  + If minor, acknowledge, apologize if appropriate, and move on
  + Ask the group what it thinks about the complainer’s idea
  + Use appropriate humor
* Dealing with the passive-aggressive person – expresses negative feelings indirectly
  + Do not get offensive and argue
  + Ask the individual about their feelings, reminding them that it’s okay to have negative feelings and say you would like to hear what’s on their mind
  + Ask the person directly to explain
* Dealing with the monopolizer – controls the discussion for long periods of time
  + Interrupt politely
  + Walk up to the person and offer a small compliment
* Dealing with the know-it-all – speaks like an expert on everything
  + Do not engage in a win/lose argument
  + Seek to engage others in the discussion
  + Acknowledge the point and ask others what they think
* Dealing with the distractor – interjects irrelevant comments and questions
  + Don’t allow yourself to go off on the tangent
  + Fit his ideas into the agenda, if possible
  + Set up a time to talk later