**Markers of Effectiveness: Success Factors for Internal Facilitators**

|  |  |
| --- | --- |
| **Success Factor** | **Comments** |
| 1. Facilitate versus lead the sessions. Avoid being prescriptive and overly directive. Instead, guide clients based on a balance between their energies and need to complete work products.
* Develop trust and respect of participants
* Maintain focus in group
* Ability to talk in front of people (confidence)
* Identify key themes from a group discussion
* Ability to remain objective
* Leading a brainstorm
* Channeling discussions
 |  |
| 1. Acknowledge others’ comments explicitly by:
* Using interpersonal communication skills
* Paraphrasing conversations positively
* Good rapport building skills including:
* Smiling and nodding
* Paraphrasing and reflecting back
* Making connections between individual comments and the work as a whole
 |  |
| 1. Adjust the session agenda in real time, balancing the speed the team can reasonably achieve with the ultimate objectives of the project.
* Keep meeting moving towards objectives/accountabilities
* Ability to set the content and parameters of the meeting
* Time management skills
 |  |
| 1. Actively and empathetically listen to and engage with others. Read body language and facial expressions to gauge participants’ state of mind, while respecting cross cultural communication of participants through their use of language and non-verbal gestures. Use your assessment of participants’ state of mind to ask probing questions or call out and test apparent issues with the team’s dynamics (e.g., feelings, trust, ground rules) within the cultural context of each participant. Having an understanding of ourselves and our own cultural frames of reference and being open to learn about peoples cultures can help us appreciate one another and respectfully work together.
* Use good communication skills such as active listening and reflective questioning and other listening skills
* Engagement skills, ability to engage a variety of audiences
 |  |
| 1. When flip charting, record *their* thoughts and specific words versus your own. Avoid impressing your own ideas on top of theirs. This is a nuanced factor as clients will often benefit from your advice, but only when requested, considered and accepted.
* Ability to summarize discussions
 |  |
| 1. Always allow participants to critique and adjust your notes after you process them. Adjusting notes based on participant feedback builds understanding, buy-in, and a willingness to adapt one’s self to agreed-upon findings and commitments.
 |  |
| 1. Avoid influencing teams to make decisions they are not ready or willing to make. Be patient and take small steps in these situations.
* Decision making skills
 |  |
| 1. Make sure that *each* individual participant is feeling and doing OK at the end of each day. As difficult conversations are had in the room, seemingly stable temperaments may waver, and you need to know it.
* Ability to enforce ground rules and explain boundaries
* Facilitation of participants from various levels within the organization
 |  |
| 1. Make sure that *you* are OK with everyone in the room. If you have misgivings or negative feelings about someone, always avoid making that the basis for your decisions and actions in facilitation.
* No perceived biases
* Don’t alienate people
* Facilitation of participants of diverse backgrounds
 |  |
| 1. Allow the teams to go off on tangents, confident that the DAPIMTM method allows you to bring them back to the work objectives. These tangents often yield new insights and important ideas for later use within the work.
 |  |
| 1. When teams are going off on tangents, provide them a line of sight to how their discussion fits into the DAPIMTM model (e.g., “right now you are adding a finding to one of your priority topics”).
* Recognize if there is a lack of progress in the meeting and help get participants back on track
* Ability to maintain focus and purpose of group-keep them on target
 |  |
| 1. Balance the group’s overall dynamics. Gauge their collective temperament and lean the other way as needed for them to practice balance themselves (e.g., encouraging an overly task-oriented team to focus on relationships).
* Manage sidebar conversations
* Keeping conversations balanced among participants
 |  |
| 1. Always allow for hot topics to be raised, but diffuse the emotional pitch that often accompanies them, through either:
* Non-personal techniques (e.g., introducing a related model)
* Empathic mirroring (in 1-on-1s or in the room)
* Ability to mediate when necessary
* Conflict resolution skills
 |  |
| 1. Guide the appropriate level of involvement of observers. If ground rules for observers are not being met, challenge this overtly. If observers are controlling a discussion, back them off openly so the team sees that this is their process.
 |  |
| 1. Technical skills
* Using outlines and agendas
* Using equipment and tools such as power point and projectors
* Transcribing notes after sessions
* Flip charting in operational terms that allow for work products to be reviewed and understood at future meetings
 |  |
| 1. Using resources and support
* Using peers as mentors and liaisons
* Co-facilitation
* Using Sponsors and leaders (RD or others) to clarify requests of service and review agendas
* Be accountable to sponsors
* Understand boundaries on projects
* Use clerical support/supplies appropriately
* Connect with Logistics Lead for information sharing
* Complete duties within specified times
 |  |