



Fearless Facilitator checklist

Use this tool to identify areas in which you could boost your confidence and credibility as a facilitator.

Of course, every situation is unique, so add whatever other “fearless” indicators are meaningful to you.

The term “client” refers to the leader of the groups you work with, whether as an internal or external facilitator.



| MARKETING | True | False | Notes to myself |
|---|------|-------|-----------------|
| I have all the clients I need. | | | |
| I am clear and convincing when I explain the benefits of facilitation. | | | |
| I feel confident when I talk to prospective clients. | | | |
| I am well paid for my services. | | | |
| I turn away clients that ask for services that I feel I cannot help (for ethical or other reasons). | | | |
| I have a business card and a website. | | | |
| I have a mailing list. | | | |
| Meeting process is explained. | | | |
| People with key information are present. | | | |
| Each agenda item has a specific person assigned to present the issue. | | | |
| Time limits set for each agenda item. | | | |
| Review of commitments and next steps before the end of the meeting. | | | |
| Meeting evaluation by participants. | | | |
| Meeting ends at the announced time. | | | |



| PLANNING | True | False | Notes to myself |
|---|------|-------|-----------------|
| I dedicate at least 40% of time spent on a project to research and planning. | | | |
| I work closely with the client or organizing committee to reach agreement on the program design. | | | |
| When I see that the client's ideas are not going to produce the desired results, I share my doubts and propose alternatives. | | | |
| I make a strong case for maximizing time spent in participatory dynamics (as opposed to just listening to reports and speeches. | | | |
| Throughout the planning process, I make sure that the planned activities will contribute to the desired outcomes. | | | |
| The agendas that I design are realistic in terms of time assigned to each topic. | | | |



| DURING THE EVENT | True | False | Notes to myself |
|---|------|-------|-----------------|
| At the beginning of a session, I take time to introduce myself and present the agenda and ground rules. | | | |
| When necessary, I modify the agenda to meet the emerging needs of the group. | | | |
| I intervene when a participant tries to dominate the discussion or goes off topic. | | | |
| I have a variety of strategies for keeping the group focused and engaged. | | | |
| When conflicts arise, I respond with calm and courage. | | | |
| I always have a Plan B. | | | |



| AT THE END OF THE JOB | True | False | N/A | Notes to myself |
|--|------|-------|-----|-----------------|
| I evaluate my own performance as facilitator. | | | | |
| I prepare a written report for the client that includes an assessment of what went well in the process, what could be improved and recommended next steps. | | | | |
| I schedule an evaluation meeting with the client . | | | | |
| I ask for testimonies and referrals. | | | | |



| PROFESSIONAL DEVELOPMENT | True | False | N/A | Notes to myself |
|---|------|-------|-----|-----------------|
| I take at least one facilitation-related training per year. | | | | |
| I participate in facilitation networks. | | | | |
| I read facilitation-related books and articles. | | | | |
| I get coaching to help me be more fearless! | | | | |
| When conflicts arise, I respond with calm and courage. | | | | |
| I always have a Plan B. | | | | |

IIFAC offers Coaching for Facilitators...so you do not have to face the challenges of alone. More information is available at <http://english.iifac.org/coaching/>

Or write me to schedule a free, 15-minute session to discuss your coaching needs and decide if it makes sense for us to work together.



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