

# General Guidelines for Facilitator Checklist

## **Prepare for session**

- Review session, determine topic introduction and evaluate need to incorporate objectives into treatment plan
- Review facilitator notes for next session so you are able to include the participants in advance (invite them to bring something to group, etc.)
- Copy session material and additional handouts (if needed)
- Review main learning points from previous session
- Evaluate need for visual aids or interactive exercises (food labels, mediset, etc.)
- Review current enrollees and call day prior for reminder
- Have group room available with necessary supplies (pencils, flip chart, etc.). Ensure the physical environment is welcoming, comfortable and attractive as possible.
- Write on board/flip chart – topic or any other introductory material you want to visually emphasize
- Prepare additional material such as certificate of attendance or snacks

## **Involve participants**

- Begin on time
- Use positive feedback early, frequently and specifically
- Engage participants by reading aloud or writing on board/flip chart
- Stop and discuss frequently
- Facilitate summarization
- Direct questions to individuals
- Maintain balanced participation
- Express expectations for regular attendance
- Maintain good boundaries and minimize self-disclosure

## **Repeat and Reapply**

- Use concrete relevant examples that apply to real life situations
- Invite general and personal examples
- Apply multimodal learning
- Give emphasis to main learning points
- Encourage note taking
- Utilize recitation
- Support and reinforce participation

## **Motivate and Engage**

- Provide recognition
- Circulate
- Use adult-to-adult interactions
- Demonstrate a positive attitude and enthusiasm
- Emphasize strengths and encourage hope
- Employ creative methods
- Recognize individual stages of change
- Use creative and interactive exercises to motivate and engage

## **Reinvolve and Close**

- Respond constructively
- Provide immediate prompts
- Cue to return or remain
- End on time
- Provide support regarding attendance and encourage return to next session

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(cont.)

## Evaluating Effectiveness

- Review Topic Assessments/Client Satisfaction or feedback
- Monitor according to organizational Performance Improvement Plan

## Structure and Strategy

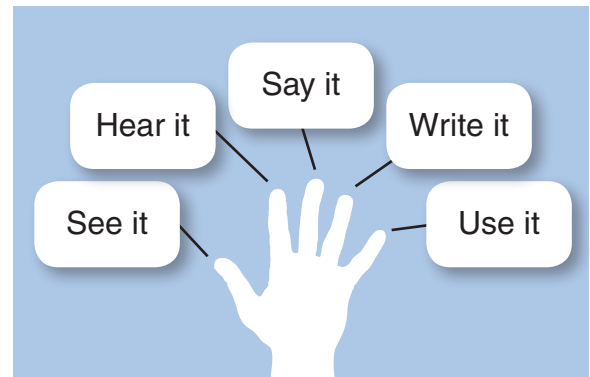
Use the TRIMM approach which is based upon motivational and engagement strategies.

- **Topic identification** (Today we will talk about...)
- **Relevance to participants** (How might learning about this topic be useful to you?)
- **Identify session objectives** (in the participant's handouts.)
- **Material presentation** (the actual content of each session)
- **Motivate participants** (to practice what they learned during and/or between sessions)

**Nine Step Session Progression.** There are nine (9) key tasks that facilitators complete which comprise the structured progression of each session and follow the TRIMM acronym:

1. Review Main Learning Points from the last session
2. Discuss Personal Practice Option completion from the last session
3. Complete, score, give feedback & collect Pre Topic Assessment
4. Introduce Topic & Relevance for Participants
5. Identify Session Objectives
6. Read, discuss, and complete Participant Handout
7. Review Main Learning Points of this session
8. Pick Personal Practice Options
9. Complete, score, give feedback & collect Post Topic Assessment

Simply presenting new knowledge is not likely to lead to behavioral change. That is why the deepest learning comes when new material is actively applied to real life situations.



**Positive feedback** helps learning more than negative comments, especially when the praise is specific.

**Provide yourself with reinforcers –** compartmentalize, de-stress, laugh, eat lunch with a friend, buy yourself flowers, revisit your values. Do what needs to be done to survive a career in a helping profession where you give so much of yourself. Renew yourself. Seek guidance, seek support, seek to grow professionally. Surround yourself with people and activities that give you mini-breaks from the challenges that you face at work. Remember to celebrate the successes.