

Pre-Facilitation Checklist and Considerations

Should you use a facilitation process?

Question	Response
Why do you want to have a facilitation?	
What is the objective or goal of the facilitation?	
What data do you hope to collect during the facilitation? How do we plan to collect and capture this data? How will we ensure participants know what data we are collecting and why to ensure we have informed consent to collect.	
Why would facilitation be the best method to reach your goals and objectives?	

Who will be the facilitator?

Question	Response
Is there someone in your organization who can serve as a facilitator? Reminder – this person should be neutral, objective, and not be affected by the outcome of the facilitation.	
If there is not someone in your organization who can serve as facilitator, who should you bring in to handle the facilitation?	

What do you need to do to prepare?

Question	Response
What is your budget to host the facilitation? Don't forget to include the space, food, supplies, and the cost of an outside facilitator if needed.	
Will the facilitation take place in-person or remotely? What considerations do you need to keep in mind when deciding on one of these options?	
Who will be invited? Why are they the right people?	
Decide who will serve in the facilitation roles. Decide if someone will serve in more than one capacity. These roles are coordinator, scribe, meeting designer, and facilitator.	
Once a team is selected, outline the agenda to meet the goals and objectives. Ensure the facilitator reviews the agenda and is allowed to give input.	
Ensure process elements are taken into account in the planning, including but not limited to: meeting flow, communication methods, addressing power/influence, problem-solving process, group participation, and decision-making process.	

