

Team facilitator checklist

This checklist assumes that you are facilitating a conversation within your regular team. In that case you know the people well and the context within which they are operating. A checklist for an external facilitator would be more extensive than that shown below. Ideally, the role of facilitator for each segment of the meeting is allocated before the meeting so that you can prepare a little.



THE PARTNERSHIP

Prior to meeting

- ☐ What is the purpose of the discussion? (to plan, decide, learn, change?)
- ☐ Who is needed in attendance to make this discussion most effective?
- ☐ What pre-work is required? Does there appear to be appropriate data if a decision is required? Has pre-reading/briefing been supplied to all team members with adequate time to digest it?
- ☐ What facilitative process might suit this discussion and purpose? (A web search will provide many quick tools/techniques.)
- ☐ What equipment will be required? (whiteboard, pens that work!, sticky dots, post it notes etc)
- ☐ How much time do you think this discussion may take? Is there adequate time in the agenda? If not, what might reasonably be achieved in the time allocated?

During the meeting

- ☐ Ask someone to summarise the issues for discussion
- ☐ Gain agreement of the whole team about what the desired outcome of the discussion is.
- ☐ Explain the process you intend to use.
- ☐ Seek volunteers for the roles of scribe and timer.
- ☐ Agree the time allocation and what may be reasonably achieved in that time.
- ☐ Remind team members of their roles as they participate in conversation together – listening, building on ideas, not interrupting etc.
- ☐ Begin the process and open the discussion – the presenter of the issue may like to kick off.
- ☐ Be the guardian of the process. Watch where you are in your chosen process and keep the team moving through that process.
- ☐ Interrupt the conversation for any observations you have about how the process is working or not. Seek the team's guidance if you need help.
- ☐ Acknowledge a change of hat if you want to contribute to the content of the discussion.
- ☐ Stay focussed on the way in which the team is working through the process and the way in which they are interacting.
- ☐ At the end of the discussion, agree next steps and who will do what. Ensure that is scribed onto the whiteboard.

After the meeting

- ☐ Ensure team members have the information that they require to follow through.
- ☐ Seek some feedback on your facilitation. It's a muscle to practice and exercise.

