

Facilitation Planning

The following template is designed to help you to plan an intervention which you have been asked to facilitate. The questions are designed for you to ask the client to get clarity on the scope and objectives of the session, and to help you plan the intervention to deliver against those. The questions are not exhaustive, you may have other questions that you need to ask – or there may be some questions on the checklist that are not relevant – but it should act as a guide to get you started.

Context	
Who is the 'client'? Who wants this event to happen?	
How has the need for this session come about?	
Why have you determined the need for external facilitation?	
Is there any business context that is particularly relevant to the session? Any big changes happening?	
Are there any 'no-go' topics / areas? Anything to be sensitive about?	
Is there senior sponsorship from this session? Who – and where – in the organisation? Why are they interested?	
What role do you expect the 'leader' to play? Is s/he part of the team, or is s/he stepping back or out ?	

Objectives / Purpose

What are you hoping to get out of the session ?
Describe both the explicit outcomes and any underlying or 'added value' outcomes.

What does success look like?

Can you specify the specific objectives and outcomes of the session?

How would you prioritise them?

Are you anticipating delivery of any 'products' from this session?

Style / approach

Is the preference for a formal approach, or informal?

What style have worked well with this team / this function in the past?

Are there any tools / techniques that are particularly favoured?

Are there any tools or approaches that have been used before that didn't really have an impact with the team?

How should the session approach be 'signed off' – checked when and by who?

Who will take responsibility for taking notes / writing up outcomes etc?

Would they expect – or be ok with – pre-work?

Attendees	
Who will attend the meeting?	
Are they eager to attend? What concerns are there?	
How has this session been presented to them?	
What are their collective expectations?	
Can I contact them individually in advance of the session to discuss their individual expectations?	

Logistics	
Confirm the date(s) of the session	
Will this be a one off, or a series of workshops?	
Is the meeting venue etc arranged? Check that it has all the facilities etc that are required (eg break out rooms, flip charts, multi-media etc)	
What I need to bring with me?	
What breaks will be required?	

Other notes