Advocacy & Communication SOLUTIONS

Facilitation Planning Checklist:

The Facilitation Planning checklist is based on the knowledge and experience of Advocacy & Communication Solutions staff. The checklist will help a facilitator design, plan for, and prepare a facilitated session from start to finish. Ideally, though not always, one would have a month to prepare for the facilitation. The checklist prompts the facilitator with ideas to consider when collecting necessary background information, including information on objectives and participants; helps the facilitator identify the best session flow; and ensures the facilitator remembers material, pre-event, and post-event details.

Basic facilitation information:

Date: ______________ Location: ______________________________

Start time: ______________________________ End time: ______________________________

SECTION 1: Design and Planning Checklist	
Background information *(3–4 weeks before)*	
✔ Determine the objective of the facilitation session. Include action, outcome and qualifier (if necessary). Example: To create a list of 10 assessment questions for program participants. ✔ Speak with the client or meeting organizer about meeting objectives.	
✔ Identify any potential challenges or barriers with this group to meet stated objectives. ✔ Speak with the client or meeting organizer about potential challenges.	
✔ Identify if there is a predetermined agenda. If so, who will provide it to you? ✔ If an agenda is not provided, and you are at liberty to create your own, develop a draft agenda. ✔ Identify if/when participants will receive a copy of the final agenda.	
✔ Identify who will be setting up the room the day of event (tables and chairs), handling technology needs (projector, computer, telephone, etc.) and food/beverage orders.	

Continued on next page

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Washington, DC 20001

Phoenix
207 North Gilbert Road
Suite 007
Phoenix, AZ 85234

Designing the session *(2–3 weeks before)*	
✔ Outline group discussions or activities that can help the group reach its goals. • Determine what information needs to be conveyed and what (if any) decisions need to be made; • Generate and organize ideas: (i.e. sticky wall); • Prioritize/analyze ideas: (i.e. dot voting); • Decision making: (i.e. multiple criteria decision making).	
✔ Identify what type of icebreaker is appropriate for the group. Which icebreaker will you use?	
✔ Identify which ground rules may be necessary for the group. • Do they already have existing ground rules? • Will there need to be time in the agenda to develop or go over ground rules? • Are there cultural norms to address in the ground rules?	
✔ Determine if any other discussions/presentations should occur during the session.	
✔ Review your agenda. Is there a logical flow to the discussion and activities during your facilitation session? • Is there a good balance of group interaction and discussion? • What questions might be asked of you during each section? • Are there sensitive topics or negative reactions that you should be ready to address? • Are there natural breaks or will you have to designate them?	
✔ Determine who is responsible during each session of the facilitation for introductions, lead facilitator, timekeeper, recorder (public), taking notes and any other roles that are necessary.	
✔ If there are other presenters or facilitators at the session, determine their role. • Who is responsible for booking them and bringing them up to speed on the purpose and content of the event?	

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Preparing materials *(2 weeks before)*	
✔ Determine if any materials will be distributed to the participants during/prior to the session (information packet, reading material, audio/visual, etc.). • Are participants required to bring any material to the session (data, reports, work samples, etc.)? • Who is responsible for creating and/or sending materials? • Who is responsible for going through the materials in the meeting? • How will you introduce the topic? • What questions or concerns may come up about the materials? Who is prepared to answer those questions?	
✔ Consider developing a source document (2–4 pages) that includes the major pieces of information on a particular issues. • An FAQ works well but you can also use a structure that reflects • What the issue is, • why it is important, and • why people should care. • Then develop shorter version of that document for particular audiences or those that do not want as much content.	

Planning checklist *(2 weeks before)*	
✔ Design the room set-up to be most conducive to the activities, number of participants and room size.	
✔ Determine if there is a need for technology of any kind (computer, projector, telephone, laser pointer, etc.) Reserve and/or confirm necessary equipment.	
✔ Determine who is responsible for room logistics on the day of the event. Identify who will be setting up the room the day of event (tables and chairs), handling technology needs (projector, computer, telephone, etc.) and food/beverage orders. Reach out to them if necessary to confirm any room set up or equipment needs.	
✔ Determine if you will do an evaluation for the session. Develop one if necessary.	

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Planning checklist *(3–5 days before)*	
✔ *Hold a prep call with other presenters and facilitators to go through agenda and answer any questions. Outside speakers may need to be briefed about audience and the objective of the session/presentation.*	
✔ *Practice how to introduce topics and/or materials based on the audience and the questions you anticipate might come up.*	
✔ *Confirm logistics: room set up, food orders, appropriate signage/ directions, name-tags, sign in sheets, handouts, etc.*	
✔ *Send out agenda and materials to participants.*	

Planning checklist *(1–3 days after)*	
✔ *Follow up and debrief with facilitation team and/or with the client/meeting organizer.*	
✔ *Send thank you email and/or presentation slides, and address any unanswered questions that came up during the session, if necessary.*	
✔ *Follow up with any important stakeholders who may have missed the meeting.*	