

Choosing a Facilitator

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Facilitation is a multifaceted approach in which a qualified person presides over a group in a problem resolution meeting, organizational retreat, strategic planning summit or other group setting.

Facilitator Roles

A facilitator moderates and assists the group to fulfill the goals and objectives of their meeting, encourages creative and innovative thinking, and keeps the group within an agenda and timeframe. Facilitators can play roles as coaches, trainers, team builders and consultants, and it should be determined which criteria are most important to the group. An experienced facilitator can guide discussions by knowing how and when to let ideas surface and be examined versus when to move on. Facilitated meetings should include structured discussions designed to engage the group in sharing information, perspectives, frustrations and insights.

The group should be confident and comfortable with the facilitator and trust his or her ability to serve in a neutral manner with regard to significant and sensitive issues. The right facilitator can keep the group focused on important issues, move the meeting forward, assist with making difficult decisions, and provide expertise and knowledge where required. Ultimately, he or she shepherds discussions into decisions and helps the group define concrete action steps.

Facilitator Questions

Selecting a facilitator is one of the most important decisions regarding the event. Facilitators operate in different ways and have different styles and experiences. It is important to identify someone who will most closely

match the needs of the meeting and the culture of the group. There are several facilitator selection criteria. The simplest is to talk with two or three possible facilitators, describe your organization and articulate what you are looking for to see if there is a fit. When performing facilitator due diligence, ask these questions:

- How might you work with our organization?
- What other experiences have you had that might help?
- Can you both prepare for and facilitate the retreat?
- What are your fees? Ask about fees for preparation time, facilitating the retreat, and preparing summary action items or follow-up reports. Facilitators have different ways of billing, such as hourly or fixed fees.
- Where are you based? Nearby facilitators can save on transportation costs, while facilitators from outside your geographic area provide greater anonymity and may have broader experience.
- Do you have any special skills or background? Some facilitators might have more skills in certain sectors and interest in the typical issues that arise in organizations in those sectors.
- Have you worked with other similar organizations? Such a person can often suggest options or solutions that have been successfully implemented by similar types of organizations.
- Based on our discussion, would you be interested in working with our company?

Facilitator “Audition”

Prior to facilitator confirmation, certain members of the group should also meet with potential facilitators prior to the meeting to determine if there is enough synergy for the group to be engaged



by a facilitator in the meeting process. The finalist should have a background in the group’s sector and the ability to grasp concepts, theories and strategies particular to the group’s business. He or she should not be intimidated by attendees who try to take control of the meeting or who wish to turn it into a complaining and griping session.

Pre-Event Meeting

Once a facilitator is chosen, he or she can help the planning team by conducting pre-retreat interviews. The facilitator can determine where core agreement and nuances deserve to be explored and where disagreements need to be examined and resolved. He or she can recommend discussions and structured activities for the retreat agenda, making sure the meeting remains focused and defined outcomes are achieved.

Having the right facilitator will significantly increase the chances of a successful meeting by fully engaging the participants and defining future commitments so that execution is the logical and agreed-upon next step. 🧩

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