



Facilitation Needs Review

Adapted from Ryann Hoffman/ Mural.co

"We need a facilitator!" Maybe. I can certainly help your team go places. But maybe you don't really need my help.

You can save a bunch of time by taking a few minutes to answer the questions below. As you think through six criteria you will determine whether or not you need professional facilitation.

Evaluate each criterion on a spectrum (which means no binary – yes or no – answers). Circle the number that corresponds to your evaluation, and place in the score column.

Criterion	Meaning											Score
Purpose	To what extent is the purpose of your session simple, or more complex? Is the purpose clear about what you're hoping to accomplish together? Does everyone agree with this purpose?											
<i>Simple purpose</i>	1	2	3	4	5	6	7	8	9	10	<i>Complex purpose</i>	
Position	To what extent is the position of this session more pivotal, or more routine? A pivotal session challenges decisions that impact profit, people, and process. A routine meeting focuses on the content of work and is low impact on outcomes.											
<i>Routine position</i>	1	2	3	4	5	6	7	8	9	10	<i>Pivotal position</i>	
Process	To what extent are processes for this session simple or complex? How updates are communicated, how decisions are made and debated. Are these processes established or will new processes be introduced?											
<i>Simple process</i>	1	2	3	4	5	6	7	8	9	10	<i>Complex process</i>	
<i>Processes are Well Established</i>	1	2	3	4	5	6	7	8	9	10	<i>Processes are NOT Well-Established</i>	
Participation	To what extent does everyone's participation and contribution matter in this session? Does everyone need equal opportunity for deep thinking and contributing their perspective?											
Everyone's participation is NOT important to the successful outcome of the session	1	2	3	4	5	6	7	8	9	10	Everyone's participation IS critical to the successful outcome of the session	
People	To what extent is the combination of people in this session complicated? How many people will be there? Are group members familiar with one another? Do members represent different backgrounds, perspectives, and life experiences.											
<i>Under five people</i>	1	2	3	4	5	6	7	8	9	10	<i>Over 30 people</i>	
<i>people are very familiar with each other</i>	1	2	3	4	5	6	7	8	9	10	<i>people don't know each other at all</i>	



Criterion	Meaning										Score	
<i>combination of people in this session is NOT very diverse</i>	1	2	3	4	5	6	7	8	9	10	<i>combination of people in this session IS very diverse</i>	
Power	To what extent do power factors in this session impact psychological safety and ability to contribute meaningfully? Will people feel safe or will they be hesitant or fearful of sharing or contributing? Will there be people vying for control of the session? Will some members attempt to manipulate the process and outcomes?											
<i>Power dynamics don't impact participants' sense of safety and contribution</i>	1	2	3	4	5	6	7	8	9	10	<i>Power dynamic makes people feel uncomfortable, unsafe, and prohibit meaningful contribution</i>	
<i>Power struggles are easy to contain, make constructive or neutralize</i>	1	2	3	4	5	6	7	8	9	10	<i>Power struggles are very difficult to contain, make constructive, or neutralize</i>	
<i>It's ok if a little manipulation happens at this session</i>	1	2	3	4	5	6	7	8	9	10	<i>Manipulation would be really problematic for this session</i>	
Total Score (sum of all rows)												

You did it! Now what?

While this assessment isn't rigorously scientific, it does shine a clear light on your facilitation needs.

Tally up your ratings from each criterion, and then add all the scores together.

Below is a breakdown of facilitation levels by assessment score.

0-11 - Consider facilitation scaffolding for your session. Facilitate this meeting on your own, or have one of your team facilitate.

12- 35 - Consider light facilitation for your session. Be prepared to add more structure than a usual meeting, and allow more space for discussion and debate than normal.

36-65 - Consider strong facilitation. Use a facilitator that can manage the process and help structure the agenda and design.

65-110 – Definitely bring in an expert facilitation. Use an outside and expert facilitator that is as well grounded in meeting process as in human dynamics.

eric@sagatica.com 619.668.8500