



Considering a Consultant

Do We Need a Facilitator for Our Meeting/Retreat?



Good question!

Even with a talented team there are times that an organization will benefit from an outside, experienced facilitator. Here are a few things to consider.

You may need a facilitator if:

- Need decisions not just discussion
- Want everyone to participate
- Leaders want to participate fully without running the room
- Topics are high stakes or sensitive
- Want to aim to eliminate bias
- Desire to foster full team ownership
- Want to stimulate fresh ideas and perspectives
- Want assistance in handling team conflict or disagreement
- This is a strategic planning, succession planning, partnership discussions or new project kickoff
- Large groups or cross-functional teams are involved
- Lack internal facilitation skills

How do we choose the right facilitator for us?

- Define your goals and be clear with what you want to accomplish before you start speaking with facilitators. This may change a bit once you speak with them and that is ok.



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- Meet with the facilitator(s) and be ready with questions to ask. Learn if they have the right experiences and qualifications, understand your goals, and are available in your timeframe and within the budget.

Sample questions to ask:

- What is your **experience** with groups like ours?
- Can you share **examples** of past work?
- How do you **learn** about our group's goals?
- How do you keep people **engaged**?
- How do you handle **quiet people** who do not speak up?
- How do you stop **loud people** from taking over?
- What do you do if the group gets **off track** or runs out of time?
- Do you provide a **written summary** or notes?
- How do you measure if the meeting was a **success**?
- Do you offer any **follow-up**?
- Expect a written proposal from them to outline the scope of work, timeline and budget along with information about the facilitator. A confidentiality agreement should also be included.
- In addition to a proposal be sure to meet with the facilitator (along with any lead staff or board member) to have a further conversation about your needs and expectations.
- The facilitator should “get” your organization in terms of culture and mission. Look for a style in the facilitator that fits with your organization.
- Beware of unrealistic promises or “big talk”. Facilitation is an art, a people-focused skill, not a science. The facilitator should care/take interest in you, your team and the mission of your organization.
- Look out for red flags in the vetting process. Are they timely? Are they available or do you have to chase them down? Are they organized? If there are negative traits, they will likely carry over into the project.

How do we pay for this?

- An organization can pay for facilitators by planning in advance and adding this to their annual budget.
- Foundations may be willing to pay for a facilitator for particular projects, particularly ones they fund or may want to fund.
- Oftentimes various grants will allow for adding in facilitator time as part of planning or assessment.

How do we work well together?

- Expect your facilitator to be candid, objective, inquisitive and informed.



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- Do your part to make the relationship work! Be clear, responsive, a good communicator and accept feedback. Make time for the project.

Learn more about our expert strategic facilitation services of KS Solutions at www.kssolution.com or reach out to Kate Scherr-Adams at kscherr@kssolution.com.