

Facilitation Checklist

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HATFIELD HOUSE
FACILITATION

Creating conversations, connecting ideas

Hatfield House Facilitation are expert facilitators in the public sector.

We are experienced in multiple consultation and engagement techniques to help you work with your stakeholders.

We have developed this guide to help clients prepare for their events and maximise the use of every consultation opportunity.

PLANNING PHASE

Consultation Purpose

- Define purpose and goal of consultation** – Why are we doing this process? What are we consulting about? Where do we want to get to in the discussion (e.g. ideas, proposals, decisions, consensus)? What is the authorising environment?
- Determine participant list by stakeholder type** – Who needs to be in the room? If some stakeholders aren't in the room, do we need to let them know about the meeting in advance and follow up with them afterwards?
- Draft and finalise agenda** – What do we need to talk about? How should the discussion be ordered to get to the intended outcomes?
- Decide if a Welcome to Country is required**, or prepare for Acknowledgement
- Draft and finalise pre-reading** – What shared knowledge will participants need to set the background and context for the discussion? Is there an information differential between stakeholders that needs to be addressed?
- Consider and determine facilitation methods** – How will we conduct the meeting? What are the best methods for eliciting the input from participants? What handouts, if any, will be needed in the meeting? Facilitator will prepare an annotated agenda
- Determine documentation approach** – Do we want minutes, a report of the discussion, or simple notes? Will documentation be provided back to participants after the meeting, or made public, and how? Who will take the notes? How soon after the meeting will notes be required?
- Issue agenda and any pre-reading** – Provide sufficient time for busy participants to be able to engage with the agenda and materials. Inform participants in advance if the meeting will be recorded
- Consider key participants for pre-consultation or to call on during the discussion** – Expert knowledge, formal position holders / host agencies, opinion leaders, consumers, key populations
- Review risks and develop mitigation strategies** – What could happen that might derail the conversation? How will we re-orient the discussion? What key messages can we communicate about contentious issues?

continued overleaf

PLANNING PHASE

Consultation Purpose *(continued)*

- Consider participants' needs** – Does anyone have needs for special audio-visual equipment, or a breakout space for people with mental illness?
- Consider the mix of stakeholders in the room** – Should participants choose their own tables / seats or do we want to construct a mix using name plates?
- Consider support staff** – Who will register participants on the day, take notes, liaise with the venue, welcome and introduce any key participants?
- Prepare and if necessary seek approval for facilitation slide deck** – your facilitator will assist with this
- Finalise participant list** and provide to facilitator and hosts
- Prepare bio's / introductions** for speakers and provide to facilitator

VENUE & LOGISTICS

- Table arrangements** (boardroom and cabaret are frequently productive)
- Laptop, data projector, USB, AV support, lectern**
- Lapel / lecturn microphones, roving microphones x 2**
- WiFi availability and code** for participants
- Power cords** for participants to use laptops and phones
- Easel / butchers paper or whiteboard, markers**
- Registration table and name tags**
- Notepads and pens** for participants
- Breakout / quiet spaces** for individuals or small group work
- Parking for participants**
- Catering / timing of breaks** to fit with agenda
- Maximum number of participants in the venue**
- Housekeeping e.g. toilets, emergency exits**

EVENT DAY

Consultation Purpose

- Ensure the hosts, planning team and facilitator are **aware of any emerging / urgent issues** that may impact on the consultation e.g. new announcements, media, operational issues

Venue and Logistics

- Set up registration desk and name labels
- Set up the room including testing AV equipment
- Set up tables e.g. pens, notepads, water, handouts, agendas, name plates
- Update participant list with any late additions / apologies
- Confirm break times with venue liaison
- Pre-meeting check in with planning team and review annotated agenda
- Welcome any hosts, speakers, key participants
- Enjoy the meeting!

POST-EVENT

- Prepare documentation** arising from the event as planned, and if necessary, approve and / or send out the documentation
- Action items noted** in the event for follow-up
- Send thank you's** to key participants
- Follow up with any participants** who expressed concern about the process or outcomes
- Consider briefing any key stakeholders / groups** who were unable to attend, on the discussion and outcomes
- Within the planning team, **consider any opportunities to improve engagement** with stakeholders for future consultations



About Joanne Smith

Joanne has an excellent reputation for providing specialist consultation and strategic expertise to public sector agencies in high profile and contentious matters. Joanne draws on a wealth of public sector leadership experience having worked in senior positions in NSW Health and in a Minister's Office. Joanne understands the complex engagement and governance environment of the Australian Health system and has a deep knowledge of stakeholders and their agendas.

About Hatfield House

Hatfield House designs innovative and feasible solutions for public sector partners. We have an enviable record of resolving complex program, policy and stakeholder issues because we understand the unique needs of government agencies. As an extension of your team, we provide a balance of dynamic thinking and in-depth analysis to deliver services that exceed client expectations and enhance stakeholder relationships.

It's our inside knowledge of the Health system that enables us to recognise what decision makers require and provide solutions that meet their objectives.

For more information about tailored team development, contact

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