TOOLS & TECHNIQUES

COMMON FRAMEWORK

GOAL
KEY QUESTION

WHO IS PARTICIPATING

SPACE DESIGN

CHECKLIST

DO I NEED AN (EXTERNAL) FACILITATOR?

CONGAZ

CHECKLIST: DO I NEED AN (EXTERNAL) FACILITATOR?

Copy the score for your choice in the last column

			SCORE	UW SCORE
1	**NUMBER OF PARTICIPANTS**			
	ONLINE	**OFFLINE**		
	a. 4 or less	a. 6 or less	1	
	b. 5 - 8	b. 6-20	2	
	c. 9 - 12	c. 21-60	3	
	d. More than 12	d. Over 60	6	
2	**ORIGINS OF PARTICIPANTS**			
	a. Same group, background, department, function, within one organisation		1	
	b. Same group or organisation, different background, functions, departments		2	
	c. Same group or organisation with some from outside		3	
	d. From different organisations, (public) groups, and/or opponents		6	
3	**SIMILARITIES BETWEEN PARTICIPANTS**			
	a. Similar education, status, background. We know each other.		1	
	b. Similar education, status, background. We know each other a little bit.		2	
	c. Differences in education, status, or background. They barely know each other.		3	
	d. Generational, status, language, and/or cultural differences. They do not know each other.		6	
4	**POSITION OF PARTICIPANTS**			
	a. Shared interest		1	
	b. Additional interests (in chain)		2	
	c. Conflicting interests (competitors) but roughly equivalent		3	
	d. Conflicting interests and unequal balance of power		6	
5	**TIME CONSTRAINTS**			
	a. Emergency situation: situation is acute, fast, result within 2 days to 2 weeks.		1	
	b. Time constraints: results needed within weeks to months		2	
	c. At some point in time; decisions with scope from months to (a) year(s)		3	
	d. Long term; policy, innovation, exploration: longer than one year		6	
6	**COMPLEXITY OR FREQUENCY**			
	a. Not very complicated, clear, routine, or weekly meeting		1	
	b. Some complexity or monthly meeting		2	
	c. Complicated, uncertainties, or annual meeting, congress, conference		3	
	d. Complex, one-off, or unique meeting; project start-up, project evaluation		6	

CHECKLIST: DO I NEED AN (EXTERNAL) FACILITATOR? (2)

Copy the score for your choice in the last column

		SCORE	UW SCORE
7	**RISK**		
	a. Little to no risk. Results are known and achievable.	1	
	b. Some risk. Results are unclear or difficult to achieve.	2	
	c. Risky. Results are unclear and feasibility is unclear.	3	
	d. High (detrimental) risk, (severe) negative consequences if results are not achieved.	6	
8	**EXPENDITURE VS. INCOME**		
	a. Routine. Only internal costs or fixed costs.	1	
	b. Some extra expenditures. Marginal effect on income.	2	
	c. Lots of expenditures. Participants, speakers, space. High impact on income.	3	
	d. Investments: Return on investment important.	6	
9	**ONLINE HABITS**		
	a. Participants are used to work online	1	
	b. Participants are used to work online but not in group work	2	
	c. Participants are used to work online but don't master the tools/techniques you want to use	3	
	d. Participants are not used to work online	6	
	TOTAL: ADD UP THE SCORES		

EXPLANATION OF THE RESULT

Score up to 14 offline or 15 online: No (external) facilitator needed.
This score involves routine decisions. Although no (external) facilitator is needed, it can work well for mutual relations to use some free forms.

Score from 15 - 21 offline or 16 - 24 online: Consider an (external) facilitator.
With this score, guidance can be useful. For example, ask a colleague or an experienced person from another department to spar. In any case, prepare the important points well. What do you want to achieve? How would you like to do that? What alternatives do you have? Don't be afraid of resistance. Resistance is needed to move. Try an indirect approach, i.e. not working towards your goals immediately, but first taking stock of how the participants experience the situation.

Score greater than 22 offline or 25 online: Get an (external) facilitator.
With this score, independent assistance is necessary. You need to control both the content and the process. You have a situation that you may still be able to deal with, but for participants, you will always have a double agenda. However, no one will say that to you! You have to deal with supporters and opponents, participation, contradiction, and advocacy. Prepare the meeting well, preferably with a professional. Make a script. Make sure the steps have a certain logic.