Your Guide to Finding a Qualified Professional Facilitator

So, you need to develop a request for proposal (RFP) and evaluate your choices for a facilitation partner? INIFAC is here to help! The primary purpose of an RFP is to provide a fair and transparent method for comparing and evaluating vendors and options. Well-crafted RFPs incent providers to present their most compelling and competitive solutions tailored to your requirements and objectives.

Your goals for the RFP should be to supply potential providers the basic requirements that help establish the project scope, schedule, and relative budget.

In the early stages the RFP will help you screen out the least qualified providers, freeing you up to work more closely with a short list of clear leaders. Depending on the amount of time you have and where you are in the budget cycle, it’s a good idea to collaborate with your short-listed firms to compare strategic options, establish corresponding budgets and develop an understanding of the work that will be required by your internal team as well as the facilitation team.

The First Factor in a Choosing the Right Facilitator

No matter how detailed or involved your RFP process, your success in selecting the best partner will correlate directly with the quality of the questions in the RFP. Well-written questions will optimize your options and clearly differentiate the providers. On the other hand, poorly crafted questions will muddle evaluations and obscure important information you will need to select that winning partner.

Good RFPs lead to good proposals, good proposals lead to better solutions and working relationships, which then lead to better projects and outcomes. So, what should you include if you want to write a good RFP?

1. **Give a very clear and concise purpose statement.**

You will want to have a clear and succinct purpose statement that explains what you are seeking to do and the product you are seeking to create. Here are a couple of sample purpose statements to guide you.

Examples

* 1. The purpose of our project is to gain agreement on the strategic direction of our company by holding a two-day strategic planning retreat.
  2. The purpose of this RFP is to select a facilitator who will successfully guide our leadership team through a series of workshops to improve our communication and alignment.

1. **Define the task list.**

List the steps you expect the vendor to take in achieving the purpose. Keep in mind, you don’t have to think of all the steps. Expect the winning vendor to create the full list.

Examples

At a minimum we expect the vendor to take the following actions

* 1. Hold a strategic planning briefing with the attendees at least 30 days in advance of the session to orient us on the session and to help us define the preparation work needed.
  2. Provide any resource information we will need on the strategy planning process.
  3. Facilitate the two-day strategy session.
  4. Document the results of the session.
  5. Recommend steps we can take to ensure we properly monitor the execution of the strategic plan.

1. **Provide the details…**

(What you have provided below…perhaps give an example?)

1. **Develop a list of questions/requests for the vendor to respond to…**

Examples

* 1. Describe the approach you use for strategic planning.
  2. For the approach you describe, explain the **typical** timeframe and duration: how many sessions, what is the duration of each session, over what time period? We understand that every strategic plan is different, but what is the case most often?
  3. Over the past five years, how many organizations have you done this approach for?
  4. Provide three strategic planning references whom we can contact. Include what the organization does, what you did for them, when you did it, and a contact person with name, title, email address and phone number.
  5. Provide all costs, including material and travel, for you to do the approach you would use with us.

1. **Be sure to ask about certification.**

**Which facilitation certifications do you hold, if any?**

When a facilitator holds a quality certification, you can be assured that they have been reviewed by their peers and have achieved an element of distinction. The **Certified Master Facilitator®** is the highest certification available to facilitators and indicates that they have achieved 4.0 or higher on a 5.0 scale on **each** of six core competency areas, which cover 30 sub-competencies. The rating is assessed both on the evaluation of a facilitated session as well as a scoring on a detailed 30-question written submission.

The CMF® is a mark of facilitation excellence. Facilitators who score under 4.0 in **ANY** of the six competency areas, on either the facilitated session or written submission, do not meet the rigorous CMF® standard.

1. **Have the final candidates facilitate the group.**

The best way to determine if a facilitator is a fit for your group is to have the facilitator facilitate the group! A simple 15-20 minute facilitation is enough for you to determine if the facilitator’s energy, pace, warmth, professionalism, probing skills, presence, personality, etc. are a good match for your group.

1. **See our Example…**

**#1 Develop a list of questions**.

Then evaluate each question by asking how each response will help you:

* Accurately define the scope
* Understand the culture and skills of each vendor
* Understand the range of options
* Compare the expertise and tools of each vendor
* Uncover new ideas and approaches you may not have considered

**#2 Determine the details that vendors need to know about the project to bid accurately**

These are the details about what you specifically need in two main areas: deliverables and outcomes. Deliverables are usually tangible products (a strategic plan, a written record of the meeting, training, an agenda, and so on). An outcome is the result of the meeting – the “why” you need a facilitator (an agreement, specific training information, consensus).

If you have dates set for your meetings, please list them (you can save a lot of time if the facilitator isn’t available on dates that you have selected).

**#3 Use the INIFAC Competencies in your decision making process.**

These peer reviewed and tested competencies are the best in the facilitation world, and will give you clear examples of competencies in areas where you might need them the most.

Here is a link to our competencies:

**#4 See our example RFP questions for some language you can use to guide you on your way!**

What questions should you be asking to assess their experience, methodology and technical capabilities?

We’ve put together some questions that we think are essential to include in your RFP for a professional facilitation partner. This list should help you to:

* Avoid a common risk or point of failure that you might have experienced in the past
* Differentiate providers’ capabilities or identify gaps in the skills/tools addressing difficult tasks
* Learn what you should expect and how you can prepare

It may seem like a lot but there's a really good chance you've already answered most of these questions in conversations with colleagues and your task in selecting a good vendor is just to get them down on paper.

Obviously, this list isn't all-inclusive and there may be other elements to include, but thoughtful questions like these signal to a facilitator that you’re taking the project seriously, that you’re investing time to understand what success means to you, and to identify what you’re really looking for.

Again, the better the RFP is, the better the proposal your vendors can send in response.

RFP Questions to Include

1. Tell us about your ability to maintain an unbiased perspective: able to create a neutral zone where alternative points of view can be shared and debated in a respectful manner.
2. Describe your sensitivity to the feelings of individuals: able to sense how people are feeling and understanding how to respond.
3. Describe your sensitivity to the feelings of the group: able to aid in developing positive group "chemistry", perceives and responds to the group's dynamic.
4. Detail your ability to listen: both to the explicit meaning of words and also to their tone and implicit meaning.
5. How do you demonstrate tact: take uncomfortable actions or awkward things said and be able to carefully and respond kindly.
6. Tell us about your commitment to collaboration and working together.
7. Share your sense of timing: has developed a sense regarding when to bring a discussion to a close, when to change the topic, when to cut off someone who has talked too long, when to let the discussion run over the allotted time and when to let the silence continue a little longer.
8. List examples of your resourcefulness and creativity: able to think on his or her feet, and change direction in mid-stream, using other creative approaches to engage the group, or entertaining ideas from the group on how to shift the agenda.
9. Tell us how you stay organized and accountable: able to capture key and necessary elements of meetings and discussion in writing, document and monitor action items from various meetings and keeps members on tasks and schedule.
10. What are the elements of success to a productive meeting?
11. What is your approach to facilitating productive meetings from a process perspective?
12. List the special challenges that occur in a municipal setting and how your firm addresses them.
13. Describe any strategies, technological tools, or other innovations you use to streamline meetings.
14. Provide two examples of past experiences in which you were able to facilitate a group of people with strong, differing opinions and diverse perspectives while discussing topics that were very sensitive in nature. Please describe how these projects were successful as well the lessons learned during the duration of the two examples provided.