

# PRIMARY FACILATOR CHECKLIST

Case Number \_\_\_\_\_

Primary Facilitator \_\_\_\_\_ Co-Facilitator \_\_\_\_\_  
Facilitation Date(s) \_\_\_\_\_

Date received case Assignment \_\_\_\_\_

Date received case/client contact Information \_\_\_\_\_

Date of first contact with: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please return the following completed forms to: Attn: Kyle Huddleston  
Shared Neutrals Program Coordinator  
3106 Pierce Parkway, Suite D  
Springfield, OR 97477

- Primary Mediator Checklist
- Consent to Mediate Form
- Debriefing Critique Form
- Client Evaluation forms (if mediators collect them)

### Please answer the following questions:

Type of Case/Conflict: (Please check all that apply)

- Employee/Employee
- Employee/Supervisor
- Interpersonal
- Crosscultural
- Unlawful Harassment
- Union Grievance
- EEO
- Other \_\_\_\_\_

Outcome:  Successful  Mixed  Unsuccessful

(Please briefly describe mediation outcome, such as the degree of resolution reached)

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Total Facilitation Hours: \_\_\_\_\_ Primary \_\_\_\_\_ Co-Facilitator \_\_\_\_\_

(Please include case development, scheduling, mediation, debriefing AND co-mediator hours in total mediation hours)

Travel Time \_\_\_\_\_ Travel Expenses \_\_\_\_\_

(Please include travel time and expenses of co-mediator)

## **Mediator Checklist**

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#### **General Procedures:**

- Contact all involved parties within 48 hours of receiving case assignment**
  - Schedule date of meeting(s) - preferably within 2 weeks of case assignment
  - Review mediation process
  - Complete case development
  
- Enlist the assistance of a co-facilitator**
  - Devise strategy for co-facilitating case
  
- Inform Program Coordinator of co-facilitator selected and date of meeting(s)**
  - Inform Program Coordinator of any changes

#### **At the Mediation/Facilitation session:**

- Write case number on all forms before distributing or completing**
  
- Everyone present signs Consent form before meeting**
  
- Each participant receives copy of Mediated Agreement form (if completed)**
  - Mediators/Facilitator do NOT retain a copy of the agreement
  
- Distribute evaluation form and envelope to each participant**
  - Collect completed forms OR encourage participants to mail back
  
- Debrief with your co-facilitator using the Mediator Critique form OR**
  - Arrange a time to debrief within a week of the meeting(s)
  
- Complete and return debriefing critique form and ALL forms to:**
  - Attn: Kyle Huddleston,
  - Shared Neutrals Program Coordinator
  - 3106 Pierce Parkway, Suite D
  - Springfield, OR 97477
  
- Send travel documentation to Agency Liaison or designated official for agency**