

Facilitator Self Assessment Skills Inventory



A n a m C a r a
Leading and Learning with Soul

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Facilitator Self Assessment Skills Inventory

The following is a Values / Practice self-assessment inventory for presenters and facilitators. It focuses on the necessary skills to do such work the following categories:

- Planning
- Presenting
- Communicating
- Working with Others
- Dual Processing
- Self Awareness

Directions

Step 1: Please answer the 49 questions on the following pages, which address several areas of skills required of presenters and facilitators. Circle the number that you think best represents your current 'practice' (I Have). Tally your overall scores for each category. Do not attempt to complete the other tasks listed.

Step 2: Now, revisit your scores and then identify those areas that you rated low that you value (I Want). Place a check next to the low ratings that you both value AND wish to improve. (You might not wish to improve in an area that you do not value).

Step 3: Review the entire inventory to find the categories where you desire the most growth. Select one or two categories in which to focus your attention.

Step 4: Create a goal for those areas you most desire to improve.

Note: You do not need a goal for every section of the inventory. In fact, focusing your efforts on one or two goals for a short period of time will most likely provide you with a greater opportunity for growth than working on everything at once.

Step 5: Fill in both the action steps required to help you succeed with mastering your learning goal AND the indicators or evidence you will seek while you are performing that will help you determine whether or not you have improved in that goal area overall.

Revisit the inventory as often as you like, adding new goal areas, checking to make sure you are still 'sharp' in areas you believe you have already mastered, etc.

Facilitator Self Assessment Skills Inventory

Planning	I Have (1 low – 5 high) Circle appropriate score					I Want Check if a focus for growth
	1	2	3	4	5	
1. Gathers the appropriate information to support planning (minutes, history, intention, feelings)	1	2	3	4	5	
2. Prepares agenda with appropriate timelines	1	2	3	4	5	
3. Plans and organizes job tasks	1	2	3	4	5	
4. Generates relevant and helpful materials for meeting purpose	1	2	3	4	5	
5. Identifies and has ready a minimum of two tools for facilitating various group tasks: <ul style="list-style-type: none"> • Defining problems • Generating ideas • Decision making • Intervention techniques • Implementation 	1	2	3	4	5	
6. Secures buy-in on defined strategy and agenda in advance of session	1	2	3	4	5	
7. Establishes / Honors the appropriate prevention strategies for effective meetings (ground rules, clear mission, meeting purpose, shared roles, etc.)	1	2	3	4	5	
8. Pre-designs and uses measurement tools to track meeting evaluation results	1	2	3	4	5	
<i>Total Score this section</i>						<i>of 40 possible</i>

My Action Plan

Personal goal to address desired growth targets:

Action steps to reach goal:

What evidence will I seek while facilitating to indicate I've accomplished the goal:

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Problem Solving / Decision Making	I Have (1 low – 5 high) Circle appropriate score					I Want Check if a focus for growth
	1	2	3	4	5	
9. Applies basic meeting maintenance skills in conducting meetings (redirect, regain and maintain focus as needed, clarify directions, give and receive feedback, etc.)	1	2	3	4	5	
10. Identifies and uses the appropriate tools / techniques to support group work as changes in agenda or direction occur	1	2	3	4	5	
11. Applies concepts of group behavior in dealing with positive and negative behaviors at meetings.	1	2	3	4	5	
12. Manages "venting" and turn conflict into collaboration	1	2	3	4	5	
13. Addresses and resolves problems	1	2	3	4	5	
14. Diagnoses and resolves basic conflicts that may emerge during a meeting.	1	2	3	4	5	
15. Accurately assesses timing and intervention technique (know when to act and when to trust the group to address its issues)	1	2	3	4	5	
16. Models effective negotiation and consensus decision-making skills	1	2	3	4	5	
17. Develops action plans	1	2	3	4	5	
18. Secures buy-in on defined action steps and plans during or at conclusion of meeting	1	2	3	4	5	
19. Supports the group in reaching consensus	1	2	3	4	5	
20. Organizes and analyzes data (compare, contrast, predict; averages, summaries, rates)	1	2	3	4	5	
<i>Total Score this section</i>						<i>of 60 possible</i>

My Action Plan

Personal goal to address desired growth targets:

Action steps to reach goal:

What evidence will I seek while facilitating to indicate I've accomplished the goal:

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Communicating	I Have (1 low – 5 high) Circle appropriate score					I Want Check if a focus for growth
	1	2	3	4	5	
21. Presents a clear message to groups	1	2	3	4	5	
22. Listens to people's needs and grievances	1	2	3	4	5	
23. Masters the use of clarification techniques (acknowledgment, questioning, and summarizing) to promote participation and collaborative decision making	1	2	3	4	5	
24. Checks for understanding and effectiveness	1	2	3	4	5	
25. Maintains a neutral stance (in non-verbals and in speaking manner/word choices)	1	2	3	4	5	
26. Provides reassurance to participants	1	2	3	4	5	
27. Reads and accurately interprets others' non-verbal cues and respond accordingly	1	2	3	4	5	
<i>Total Score this section</i>						<i>of 35 possible</i>

My Action Plan

Personal goal to address desired growth targets:

Action steps to reach goal:

What evidence will I seek while facilitating to indicate I've accomplished the goal:

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Working with Others	I Have (1 low – 5 high) Circle appropriate score					I Want Check if a focus for growth
	1	2	3	4	5	
28. Maintains respectful stance for all in the group – honoring a variety of participatory styles						
29. Creates a safe environment for participation						
30. Examines and improves the planning process, decision-making, risk-taking, problem-solving and communication strategies as a team						
31. Makes suggestions for improvements in a manner that allows suggestions to be received and appreciated						
32. Serves in a manner that is friendly/helpful and service-oriented						
33. Creates a synergistic flow amongst participants to encourage teamwork and keep the excitement alive						
34. Leads when appropriate, but transfer responsibilities / tasks to others in an effort to empower participants						
35. Shares expertise freely, visibly and audibly transferring knowledge and skills when necessary						
<i>Total Score this section</i>						<i>of 40 possible</i>

My Action Plan

Personal goal to address desired growth targets:

Action steps to reach goal:

What evidence will I seek while facilitating to indicate I've accomplished the goal:

Facilitator Self Assessment Skills Inventory

Dual Processing	I Have (1 low – 5 high) Circle appropriate score					I Want Check if a focus for growth
	1	2	3	4	5	
36. Keeps an eye to the immediate moment and the long range direction – intervening as necessary to keep the group moving toward the target (<i>big picture thinking</i>)						
37. Maintains flexibility in design and approach – adjust to accommodate the needs of the group while maintaining course toward the end target (<i>freedom from attachment to the 'how' or the agenda</i>)						
38. Predicts / Anticipates potential political or organizational snags or difficulties and establish steps to avoid or support group through the challenges (<i>context and content awareness</i>)						
39. Monitors and continually evaluates group and individual performance, intervening as necessary to create the conditions for success in meeting outcomes (<i>synchronous analysis and response</i>)						
40. Synthesizes information to create necessary linkages to past work or co-existing initiatives and clearly delineated next steps (<i>systems thinking</i>)						
41. Synthesizes information to create necessary linkages to past work and clearly delineated next steps (<i>systems thinking</i>)						
<i>Total Score this section</i>						<i>of 30 possible</i>

My Action Plan

Personal goal to address desired growth targets:

Action steps to reach goal:

What evidence will I seek while facilitating to indicate I've accomplished the goal:

Facilitator Self Assessment Skills Inventory

Self Awareness	I Have (1 low – 5 high) Circle appropriate score					I Want Check if a focus for growth
42. Analyzes personal strengths and weaknesses as a facilitator and develops and acts on an action plan for improvement	1	2	3	4	5	
43. Seeks advice as needed	1	2	3	4	5	
44. Solicits / Welcomes audience feedback – during and after the session - and incorporates suggestions for improvement as appropriate	1	2	3	4	5	
45. Answers “I don’t know” when uncertain of the requested answer and follows up as needed (e.g. doesn’t over promise knowledge or skills)	1	2	3	4	5	
46. Facilitates groups with objectivity – removing personal agenda	1	2	3	4	5	
47. Self-checks motivation, attachment to outcome, and purpose in the times when using persuasion while facilitating	1	2	3	4	5	
48. Offers solicited advice carefully, professionally and infrequently	1	2	3	4	5	
49. Employs strategies to ‘opt out’ of facilitation role when serving as a contributor to the meeting or empowering others to leadership roles	1	2	3	4	5	
<i>Total Score this section</i>						<i>of 40 possible</i>

My Action Plan

Personal goal to address desired growth targets:

Action steps to reach goal:

What evidence will I seek while facilitating to indicate I’ve accomplished the goal:
