

Competency Assessment

Begin your journey to facilitation mastery by reviewing the descriptions and competencies that follow. Identify both the skills that you currently possess and those areas in need of further development, then create your personal learning goals. The descriptions and competencies are arranged in three levels:

Level I – consists of the core skills required to lead routine discussions and manage meetings effectively

Level II – consists of the ability to design complex decision processes and manage difficult situations

Level III – involves designing and leading activities that are part of a planned change effort

Level I - Basic Competencies Self-Assessment

New facilitators almost always start out leading the regularly scheduled meetings held within their own department or project team. These are meetings where they're familiar with the content under discussion and will be able to ask effective questions due to their knowledge of the issues being explored.

In these meetings the group leader is typically present, as are the facilitator's peers. The facilitator may be notified in advance to lead the meeting or, as is often the case, be pressed into action without much notice if the need for facilitation materializes.

1 = Totally disagree 2 = Disagree 3 = Not sure 4 = Agree 5 = Totally agree

1. I understand the concepts, values and beliefs underpinning facilitation. _____
2. I'm aware of what to do at the start, middle and end of a facilitation _____
3. I'm skilled at active listening, paraphrasing, questioning and summarizing key points. _____
4. I'm able to manage time and maintain a good pace. _____
5. I know techniques for encouraging active participation and generating ideas. _____

6. I know how to create and then use group norms to encourage effective behaviors. _____
7. I can make clear notes that accurately reflect what members have said. _____
8. I'm familiar with the core process tools used to structure participative group discussions. _____
9. I understand the difference between various decision-making tools and know when to use each one. _____
10. I understand how to help a group achieve consensus and gain closure. _____
11. I'm skilled at offering constructive feedback to groups and am comfortable accepting personal feedback. _____
12. I know the key components of an effective meeting design and can create a detailed agenda. _____
13. I know how to ask good probing questions that challenge assumptions in a nonthreatening way. _____
14. I know when and how to conduct periodic process checks. _____
15. I know how to use a variety of exit surveys to improve meeting effectiveness. _____

Level I skills I currently possess:

Level I skills that I would like to develop further:

Level II – Intermediate Competencies Self-Assessment

Once a facilitator has gained experience managing regular staff meetings, they may be asked to lead special-purpose meetings for their peers or even for groups who are outside their work unit.

This transition can take place for a number of reasons. It can occur naturally simply because all groups have a periodic need for special-purpose meetings such as problem-solving sessions, planning meetings, or team-building workshops.

This shift can also happen when a facilitator is sought out for assistance by those outside their immediate work group if they've gained a reputation for being effective. Regardless of the reason for the shift, leading more complex, special-purpose conversations requires an additional level of skill. This is especially true if the participants are unknown to the facilitator.

1 = Totally disagree	2 = Disagree	3 = Not sure	4 = Agree	5 = Totally agree
----------------------	--------------	--------------	-----------	-------------------

16. I know how to use surveys and conduct interviews to assess group needs and interests. _____
17. I can design meetings for a variety of purposes and can adjust my designs in mid-stream if necessary. _____
18. I know strategies to create a safe environment and gain buy-in from reluctant participants. _____
19. I can deal with resistance nondefensively, even when it's aimed at me personally. _____
20. I know the signs of 'group think' and can structure discussions to overcome it. _____
21. I'm skilled at asking complex probing questions that help members uncover underlying issues and information. _____
22. I can recognize the signs of group tension or conflict and do not hesitate to offer that insight to groups. _____
23. I'm able to appropriately and assertively intervene in order to redirect ineffective behavior. _____
24. I'm able to articulate both sides of an issue, then offer a process to reframe the conversation. _____

25. I'm able to hear and then consolidate ideas from a mass of information and create coherent summaries. _____
26. I can recognize when decision processes are polarized and know how to restructure them so they're collaborative. _____
27. I possess tools to help groups out of decision deadlocks. _____
28. I understand the team development process and know how to implement a variety of team-building activities. _____
29. I'm sensitive to interests, needs and concerns of individuals from different cultural backgrounds and from various levels and functions in the organization. _____
30. I'm sufficiently versed in process responses that I never lose my neutrality even during difficult conversations. _____

Level II skills I currently possess:

Level II skills that I would like to develop further:

Level III – Advanced Competencies Self-Assessment

A facilitator is required to possess skills at the third and final level of mastery any time they're approached to design and lead processes that involve either a planned intervention to resolve a dispute, an initiative aimed at enhancing organizational effectiveness or a planned change effort. Whether the assignment is internal or external to their usual work group, when a facilitator takes on such a facilitation assignment, they're functioning as an Organization Development consultant.

Note that the facilitator is now said to be acting as a consultant because they're acting to help or support a client through the application of their specialized knowledge in a situation where they lack managerial control. In the case of Organization Development consulting, that special knowledge is the application of process tools and techniques that are used to engage stakeholders in every step of the planned activity.

1 = Totally disagree	2 = Disagree	3 = Not sure	4 = Agree	5 = Totally agree
----------------------	--------------	--------------	-----------	-------------------

31. I have a personal philosophy of facilitation that guides my work. _____
32. I'm aware of strategies for negotiating the power I need in order to be effective in any situation. _____
33. I understand the theories and primary methodologies of Organization Development. _____
34. I'm aware of the steps that make up the core processes that facilitators are asked to apply. _____
35. I'm aware of change management models and can use them to design and implement complex change activities. _____
36. I know how to design and facilitate various strategic and business planning discussions. _____
37. I know the steps in the main process tools that are part of process improvement efforts, such as process mapping. _____
38. I'm skilled at designing and implementing surveys. _____
39. I'm skilled at using survey feedback to involve clients to interpret their own data and identify actions. _____
40. I'm able to design and implement interpersonal and intergroup conflict interventions to settle contentious issues. _____

- 41. I'm aware of the steps in the coaching process and know how to use coaching to help individuals and teams. _____
- 42. I'm able to deal comfortably with high-level management one-on-one and in group settings. _____
- 43. I know how to contract for the use of my services as a neutral third party and operate as a process consultant. _____
- 44. I'm able to design complex one- and two-day meetings and retreats to achieve specific outcomes _____

Level III skills I currently possess:

Level III skills that I would like to develop further:

Combine the areas of further learning that you have identified in each of the three levels to create a personal learning plan to guide you.

The skills and competencies that I plan to acquire or improve include: 
