
Facilitation Skills Self-Assessment

Identify your current level of facilitation mastery by reviewing the descriptions and competencies that follow. 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 interventions

Provide a rating for each item using the following scale:
1 = totally disagree 2 = disagree 3 = not sure 4 = agree
5 = totally agree

Level I: Basic Competencies

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 differences among 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 non-threatening 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 II: Intermediate Competencies

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 midstream if necessary. _____

18. I know strategies to create a safe environment and gain buy-in from reluctant participants. _____

19. I can deal with resistance non-defensively, even when it's aimed at me personally. _____

20. I know the signs of groupthink 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 and 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 the 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 III: Advanced Competencies

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 teammates 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 upper management both individually and in group settings. _____

43. I know how to negotiate the power and authority levels I need in order to be effective. _____

44. I'm able to design complex one and two day meetings and retreats to achieve specific outcomes. _____

Skills and competencies that I currently possess:

Skills and competencies that I would like to develop further: