

Facilitator Competence Assessment

A Worksheet

Please use this worksheet to assess your competence. It is wise to be more honest than hopeful. You are looking at your own knowledge, experience and abilities in relation to the ToP Facilitator Competencies. It will help you focus your attention on those areas that you believe need genuine improvement in order to ensure excellence. The first section is the worksheet and the second section is a more detailed description of each competency.

ToP™ Facilitator Competency	Strengths	Learning Needs
Manage Positive Client Relationships		
Understand Client Needs Assess client needs and clarify mutual understanding		
Create Appropriate Designs Design customized facilitation plans toward quality results		
Communicate Client Needs Articulate client needs and plans in writing		
Effective Project Management Appropriate marketing, management and financial systems		

ToP™ Facilitator Competency	Strengths	Learning Needs
Create a Participatory Environment		
Communicate Effectively Effective communication skills, rapport, active listening and feedback		
Create Positive Atmosphere Encourage respect for experience and perception of diverse participants		
Resolve Group Conflicts Mediate conflict and manage disruptive individual and group behaviour		
Implement Plans Effectively Create and use facilitation procedures to engage the group in their task		

ToP™ Facilitator Competency	Strengths	Learning Needs
Evoke the Creativity of the Group		
Understand Learning Needs Assess learning styles and needs.		
Apply Appropriate Approaches Use learning approaches that best fit the group.		
Elicit Group Creativity Engage all participants, awaken group energy and encourage creative thinking.		
Utilize Space and Time Effectively Plan effective use of time, space, visuals and equipment.		

ToP™ Facilitator Competency	Strengths	Learning Needs
Use ToP™ Methods Effectively		
Conduct Great Conversations Create 4 levels of questions and orchestrate focused conversations.		
Do Productive Workshops Use the ToP™ workshop method appropriately and effectively.		
Facilitate ToP Strategic Planning Design and Use strategic planning methods appropriately		
Guide Action Planning Ensure that group has a clear commitment and doable actions		
Conduct ToP Historical Scan/ Wall of Wonder Guide a historical description of the group journey		

ToP™ Facilitator Competency	Strengths	Learning Needs
Model Positive Professional Attitude		
Evoke Depth and Substance to Illuminate Group Potential Reveal the possibility in every situation and elicit group insight.		
Care for Group Journey Enable group to go on journey of change, transformation and development.		
Practice Self-Assessment and Self-Awareness Modify personal behaviour and style to reflect the needs of the group		
Act with Integrity Make choices with authenticity and responsibility		
Model Neutrality Maintain an objective, non-defensive, non-judgmental stance		

ToP™ Facilitator Competency	Strengths	Learning Needs
Orchestrate Quality Events		
Manage Overall Process Set clear context, use participatory processes and bring appropriate closure.		
Ensure Dynamic Process Keep the conversation moving, focused on the task and elicit wisdom.		
Adapt to Group Needs Adapt processes to fit the needs of the individuals and group.		
Work Effectively with a Team Demonstrate team values and co-facilitation.		

ToP™ Facilitator Competency	Strengths	Learning Needs
Produce Effective Results		
Apply Appropriate Methods Apply appropriate methods to ensure task completion and results.		
Clearly Document Results Keep ongoing records of group work and produce quality documentation		
Develop Authentic Consensus Enable the group to develop and articulate authentic consensus.		
Prepare for Solid Implementation Determine and enable the group to create implementation plans		

ToP Facilitator Competencies

1.0 Manage Positive Client Relationships

1.1 Understand Client Needs

- Assess and understand client needs, apply process to content and clarify mutual understanding
- Can assist clients in applying methods to content and task
- Clarify mutual understanding and commitment
- Can establish clear rational and experiential aims

1.2 Create Appropriate Designs

- Design customized constructs toward a quality product drawing upon a variety of methods, applications and resources
- Can draw upon a variety of methods, applications and resources and determine which to apply
- Uses "ORID" as an underlying pattern to create designs

1.3 Communicate Client Needs

- Articulate client needs and plans in writing using graphics and communicate essential method and principles.
- Can articulate plans in writing
- Can depict plans using graphics
- Can communicate essentials of method, process and principles

1.4 Manage Projects Effectively

- Appropriate management of facilitation projects
- Negotiate and write contracts
- Management of time and schedules
- Maintain positive relationships
- Resolve disputes
- Complete contracted work on time and within budget in an appropriately professional style
- Conducts appropriate participant and client debriefing and evaluation process

2.0 Create a Participatory Environment

2.1 Communicate Effectively

- Effective communication skills, an objective stance, rapport, active listening and participant feedback
- Effective verbal communication
- Rapport with participants
- Practice active listening
- Ability to observe and provide feedback to participants

2.2 Create Positive Atmosphere

- Encourage respect for experience and perception of diverse participants; creating a climate of safety and trust
- Encourage positive regard for experience and perception of all participants
- Create a climate of safety and trust
- Bring forth the diversity of the group

2.3 Resolve Group Conflicts

- Mediate conflict and manage disruptive individual and group behaviour
- Recognize and allow conflict to surface and objectify it
- Mediate conflict
- Manage disruptive individual and group behaviour

2.4 Implement Plans Effectively

Clarify objectives, focus questions, procedures and engage the group in their task
Articulate clear contexts
Clarify rational and existential objectives
Create appropriate focus questions
Provide clear procedures and instructions
Establish and maintain group norms
Able to get the group effectively engaged in their tasks

3.0 Evoke the Creativity of the Group

3.1 Understand Learning Needs

- Assess learning styles, needs and abilities and design appropriate experiences
- Understand multiple learning styles and learning theory
- Assess group sensory needs and abilities
- Able to blend learning and thinking styles

3.2 Apply Appropriate Approaches

- Use learning approaches that best fit the group and modify approach to meet emerging needs
- Select from a wide variety of sensory approaches
- Use approaches that best fit the needs and abilities of the group

3.3 Elicit Group Creativity

- Engage participants of all styles, awaken group energy and encourage creative thinking
- Communicate with all styles
- Draw out participants of all styles
- Awaken group energy
- Encourage creative thinking
- Discern and respond to stalled creativity
- Able to adapt own style to group needs

3.4 Utilize Space and Time

- Plan effective use of time, space, visuals and equipment
- Arrange space to meet the purpose of the meeting
- Plan and monitor effective use of time
- Records ideas visibly and legibly
- Uses visual materials and equipment effectively
- Know when to move the group and when to stay
- Manage symbolic and celebratory aspects of meetings

4.0 Use ToP Methods Effectively

4.1 Conduct Great Focused Conversations

4.1a Design

- Create effective focused conversation.
- Identifies appropriate rational and experiential aims, opening and closing
- Provides appropriate concrete beginning point
- Create and adapt 4 levels of questions in sequence

4.1b Lead

- Orchestrate discussion flow:
- Able to use the discussion method to reach depth in the content
- Able to guide and adapt discussion flow
- Adapt discussion method to many applications

4.2 Do Productive Consensus Workshops

4.2a Design

- Knows what situations are best suited for use of workshop method
- Identifies rational and experiential aims
- Designs appropriate focus question that will achieve rational aim of workshop

4.2b Lead

- Generate quality brainstorm
- Assist the group in synthesizing ideas in clusters
- Enables the group to give meaningful names to data clusters
- Guide appropriate reflection
- Adapt workshop method to many applications
- Document results

4.3 Facilitate ToP Strategic Planning

4.3a Design

- Know when to use strategic planning
- Understands ToP Strategic Planning cycle and its impact
- Adapts focus questions and agenda to group needs

4.3b Lead

- Conducts appropriate environmental analysis activity
- Communicates helpful context for each workshop and for whole process
- Guides group to identify practical vision, deep contradictions, motivating strategies, and concrete action plans

4.0 Use ToP Methods Effectively

4.4 Guide Action Planning

4.4a Design

- Choose appropriate planning design
- Creates agenda for context and closing of session

4.4b Lead

- Establish clear context and instructions
- Uses approach, language, phrasing to connect the current reality with the anticipated victory
- Ensures “outcome” and “action” language used appropriately
- Ensures alignment between individual action plans
- Ensures follow-through mechanisms are in place
- Creates clear visual documentation

4.5 Conduct ToP Historical Scan / Wall of Wonder

4.5a Design

- Determine appropriate use
- Have clear purpose and aims
- Choose appropriate timelines

4.5b Lead

- Explain clearly to the group the process, reason, purpose, and each step
- Encourage honesty to explore positive and negative aspects
- Guide group through brainstorming, posting, high and low points, turning points, naming parts and the whole, reflection / evaluation
- Adapts process to needs of group
- Uses visual on wall appropriately

5.0 Model Positive Professional Attitude

5.1 Evoke Depth and Substance to Illuminate Group Potential

- Reveal the possibility in every situation
- Honour the wisdom of the group
- Enable the group to acknowledge and understand its real situation
- Elicit root issues
- Enable the group to see real possibilities and options
- Enable the group to assume ownership and responsibility for its results
- Uncover profound insights of the group

5.2 Care for Group Journey

- Understand dynamics of individual and group change
- Understand and apply processes of image change
- Enable groups to bring up and deal with difficult issues and undiscussables
- Guide group through discouragement
- Enable group to go on journey of change, transformation and development of new capacity over time
- Build capacity, not dependency

5.3 Practice Self-Assessment and Self-Awareness

- Reflect on behaviour and results
- Maintain congruence between actions and personal and professional values
- Modify personal behaviour / style to reflect the needs of the group
- Cultivate understanding of one's own values and their potential impact on work with clients

5.4 Act with Integrity

- Describe situations as facilitator sees them and inquire into different views
- Demonstrate affirmation of the group and its possibility
- Make choices with authenticity and responsibility
- Demonstrate inclusiveness
- Model professional boundaries and ethics (as described in ethics and values statement)

5.5 Model Neutrality

- Honour the wisdom of the group
- Encourage trust in the capacity and experience of others
- Vigilant to minimize influence on group outcomes
- Maintain an objective, non-defensive, non-judgmental stance

6.0 Orchestrate Quality Events

6.1 Manage Overall Process

- Conduct whole, integrated processes
- Establish clear context and brings appropriate closure
- Apply a variety of participatory processes
- Manage large and small group processes

6.2 Ensure Dynamic Process

- Keep the conversation moving, focused on the task and elicit the wisdom of the group.
- Keep the group moving
- Recognize tangents - redirect to task
- Listen, question and summarize to elicit the sense of the group
- Help the group reflect on experience

6.3 Adapt to Group Needs

- Adapt processes to specific group situations.
- Adapt processes to fit the needs of the situation
- Target questions to orchestrate change
- Able to assess and respond to the group's energy
- Enable groups to develop identity and purpose

6.4 Work Effectively with a Team

- Demonstrate team values and processes
- Support co-facilitation in delivery of services
- Demonstrate team values and processes
- Support co-facilitation in delivery of services
- Design services in cooperation with clients and colleagues

7.0 Produce Effective Results

7.1 Apply Appropriate Methods

- Can determine what results are required and ensure task completion
- Know a variety of applications to meet group objectives
- Can determine what product or result is required
- Adapt processes to changing situations
- Assess and communicate group progress
- Assist with task completion

7.2 Clearly Document Results

- Keep ongoing records of group work and produce quality documentation on schedule
- Keep ongoing notes and records
- Produces quality documentation on time

7.3 Develop Authentic Consensus

- Determine what is required and enable the group to develop and articulate authentic consensus
- Able to determine what kind of decision or consensus is required
- Enable the group to develop authentic consensus
- Enables effective articulation of consensus and decisions

7.4 Prepare for Solid Implementation

- Able to enable groups to create appropriate implementation plans
- Able to determine what kind and level of implementation planning is necessary
- Able to design effective implementation planning processes
- Evokes commitment to follow-through
- Able to clarify and assist working groups