# Self-Assessment: Effective Design and Facilitation Skills

**Directions**: Read each of the following and rate your current level of knowledge and demonstrated skill level in each of the five sections using the following scale:

**1 = Not Usually 2 = Rarely 3 = Occasionally 4 = Often 5 = Almost always**

**A. Designing Training Sessions:**

\_\_\_\_\_ 1. I assess the learning needs of participants before I design the development session.

\_\_\_\_\_ 2. I gather background data on the demographics and experiences of the participants before I design the development session.

\_\_\_\_\_ 3. I use some type of conceptual model(s) as I design activities. (Examples: “What, So What, Now What,” Gibb: Who am I? Who are You? What are we going to do? How are we going to do it?” or the Experiential Learning Cycle: Do, Reflect, Analyze, Generalize, Apply.)

\_\_\_\_\_ 4. I write specific, realistic, and behavioral learning outcomes that are linked to the learning needs of participants.

\_\_\_\_\_ 5. I write clear and understandable designs and lesson plans.

\_\_\_\_\_ 6. I develop effective grounding, warm-up/icebreaker activities that leave participants feeling energized, engaged and motivated to learn.

\_\_\_\_\_ 7. I sequence activities to teach foundational concepts and skills before more complex ones.

\_\_\_\_\_ 8. I design activities that meet the varying learning styles of all learners.

\_\_\_\_\_ 9. I effectively use a variety of learning methods and tools, including experiential learning, small group activities, journaling, media, role plays, music, etc.

\_\_\_\_\_ 10. I create multiple opportunities for participants to teach each other in a participative, collaborative learning environment.

\_\_\_\_\_ 11. I design activities that are inclusive of all participants across social group identities.

\_\_\_\_\_ 12. I use the principles of Universal Design in all learning activities to create maximum accessibility to the material and activities.

\_\_\_\_\_ 13. I develop useful handouts and learning tools that help participants both deepen their learning and apply the concepts and skills to their lives.

**B. Facilitating Development Sessions:**

\_\_\_\_\_ 14. I create learning environments that are respectful and challenging a brave space.

\_\_\_\_\_ 15. I use effective listening and communication techniques, including clarifying, paraphrasing, open-ended questions, etc.

\_\_\_\_\_ 16. I demonstrate empathy effectively.

\_\_\_\_\_ 17. I use silence effectively.

\_\_\_\_\_ 18. I use humor appropriately and effectively.

\_\_\_\_\_ 19. I manage time effectively.

\_\_\_\_\_ 20. I introduce activities and give directions well.

\_\_\_\_\_ 21. I effectively teach key concepts, definitions, and terms as I process activities and facilitate discussions.

\_\_\_\_\_ 22. I process activities using open-ended and closed-ended questions effectively.

\_\_\_\_\_ 23. I use processing questions to move participants through the Experiential Learning Cycle to help them make meaning of activities and apply their insights to create change (Do, Reflect, Analyze, Generalize, Apply; or What? So What? Now What?)

\_\_\_\_\_ 24. I effectively move discussions and activities along and keep the group focused and “on track.”

\_\_\_\_\_ 25. I acknowledge and appreciate people’s participation.

\_\_\_\_\_ 26. I summarize discussions and make transitions effectively.

\_\_\_\_\_ 27. I encourage group members to participate and engage them in the process through my choice of activities and my facilitation style.

\_\_\_\_\_ 28. I use “Connecting Language” that bridges one person’s comments to another’s.

\_\_\_\_\_ 29. I effectively find some relevant point in participant comments, even those that seem way off the topic.

\_\_\_\_\_ 30. I effectively help participants recognize assumptions and help them differentiate between observable facts and interpretations.

\_\_\_\_\_ 31. If I believe someone is on a tangent, I can effectively acknowledge their point, and redirect the conversation back to the group’s topic.

\_\_\_\_\_ 32. I minimize how much I use the “telling” style and maximize how often I pose questions or dilemmas to facilitate dialogue among participants.

\_\_\_\_\_ 33. I am able to “relate in” and “see myself in the participants” to find compassion and make a connection with them, rather than judging them or distancing from them.

\_\_\_\_\_ 34. I use self-disclosure and share feelings, thoughts, opinions, and personal experiences effectively.

\_\_\_\_\_ 35. I easily “go with the flow” and am flexible with the agenda as I adjust to the needs of the group in the moment.

\_\_\_\_\_ 36. I consider feedback and coaching from group members and co-facilitators.

\_\_\_\_\_ 37. I can “meet the participants where they are” and not demand or expect them to be farther along in their understanding or skill development.

\_\_\_\_\_ 38. I can easily stay in the facilitator role and not become a participant in the learning process.

\_\_\_\_\_ 39. I effectively use my voice and nonverbal behavior to facilitate learning and engage participants.

\_\_\_\_\_ 40. I effectively name and discuss group dynamics with participants in the moment and use them as “teachable moments” to facilitate deeper learning.

\_\_\_\_\_ 41. I can “let go of the outcome” and “trust the process” knowing learning takes place even when I do not recognize it happening in the moment.

**C. Facilitating with an Inclusion Lens**

\_\_\_\_\_ 42. I talk about the organization’s commitment to diversity and inclusion.

\_\_\_\_\_ 43. I state that it is everyone’s responsibility to help create an organizational climate that is respectful and inclusive for all community members.

\_\_\_\_\_ 44. I effectively discuss the common daily indignities and microaggressions that people from marginalized groups experience.

\_\_\_\_\_ 45. I effectively discuss specific behaviors and actions that help create an inclusive organizational environment.

\_\_\_\_\_ 46. I consistently demonstrate respect for all participants across privileged and marginalized group memberships.

\_\_\_\_\_ 47. I pay attention to the multiple group memberships of participants and notice patterns of participation, including who’s talking, who is quiet, who interrupts, who gets interrupted, who takes leadership, whose ideas “plop” or are ignored, etc.

\_\_\_\_\_ 48. I notice what issues of diversity are discussed effectively and which ones are ignored or not addressed productively.

\_\_\_\_\_ 49. I recognize and interrupt prejudice, stereotypes, and exclusionary group dynamics that occur in the session.

\_\_\_\_\_ 50. I am aware of how people may experience and interpret comments and nonverbal behaviors differently based upon their cultural perspective and their experiences in their multiple privileged and marginalized groups.

**D. Responding in “difficult dialogues” with an Inclusion Lens**

\_\_\_\_\_ 51. I effectively navigate discussions where group members are feeling and expressing deep emotions, including anger, sadness, fear, frustration, hopelessness, etc.

\_\_\_\_\_ 52. I am able to be “in the moment” ~ fully present and focused on what is happening in the group and in myself during difficult dialogues.

\_\_\_\_\_ 53. I effectively respond to participant behaviors I believe are distracting, including dominating, interrupting, side-tracking, side conversations, etc.

\_\_\_\_\_ 54. I acknowledge comments which sound inappropriate or triggering.

\_\_\_\_\_ 55. I engage people in dialogue when I experience one of their comments as inappropriate or triggering.

\_\_\_\_\_ 56. I recognize that “resistance” and challenges from participants are often doorways to deeper understanding and learning for the group.

\_\_\_\_\_ 57. I effectively navigate conflict and disagreement among group members.

\_\_\_\_\_ 58. I respond effectively to challenges and engage “resistance” from group members without taking it personally or feeling deeply triggered.

\_\_\_\_\_ 59. I can use triggering events as “teachable moments” for the group.

**E. My self-work as a facilitator**

\_\_\_\_\_ 60. I am aware of my biases, assumptions, and stereotypes for the full range of privileged and marginalized groups.

\_\_\_\_\_ 61. I continually interrupt, reframe, and unlearn my biases, stereotypes, and assumptions about privileged and marginalized groups.

\_\_\_\_\_ 62. I understand how my various privileged and marginalized group memberships impact how I am perceived and experienced by others.

\_\_\_\_\_ 63. I understand how my various privileged and marginalized group memberships impact how I make meaning of situations and how I react/respond.

\_\_\_\_\_ 64. I am aware of how my beliefs about what is “effective” \_\_\_\_\_\_\_ has been influenced by my socialization and experiences in my multiple privileged and marginalized group memberships (i.e., facilitation, dialogue skills, conflict resolution, training, meeting management, supervision, advising…)

\_\_\_\_\_ 65. I continuously self-reflect to examine my behaviors, assumptions, feelings, and attitudes and their impact on others with an Inclusion Lens.

\_\_\_\_\_ 66. I continually seek and utilize feedback about my behaviors and attitudes from members of privileged and marginalized groups and utilize their input to improve my practice.

\_\_\_\_\_ 67. I am aware of my “early warning signals” that I am beginning to feel triggered.

\_\_\_\_\_ 68. I am able to notice and navigate my own triggered feelings of anger, fear, stress, grief, etc., so that I do not “work my issues on the group.”

\_\_\_\_\_ 69. I am aware of my common triggers and their intrapersonal roots.

\_\_\_\_\_ 70. I actively do my work around my hot buttons and triggers: explore their roots; do my healing work; etc.

\_\_\_\_\_ 71. I actively continuously expand my understanding of issues of diversity, inclusion, and social justice.