
Assessment 11-4

Facilitator Competencies

This assessment instrument will help you manage your own professional development and increase the effectiveness of your time management training sessions. Training facilitators can use this instrument in the following ways:

- ◆ **Self-assessment.** Use the assessment to rate yourself on the five-point scale, which will generate an overall profile and help determine the competency areas that are in the greatest need of improvement.
- ◆ **End-of-course feedback.** Honest feedback from the training participants can lessen the possibility that facilitators deceive themselves about the 12 competencies. Trainees may not be able to rate the facilitator on all 12, so it may be necessary to ask the participants to rate only those they consider themselves qualified to address.
- ◆ **Observer feedback.** Facilitators may observe each other's training sessions and provide highly useful information on the 12 competencies that are crucial to be effective in conducting time management training.
- ◆ **Repeat ratings.** This assessment can be the basis of tracking professional growth on the competencies needed to be an effective facilitator. The repeat measure may be obtained as often as needed to gauge progress on action plans for improvement.

The Competencies

Facilitators are faced with many challenges anytime they lead a training session. Many skills are necessary to help participants meet their learning needs and to ensure that the organization achieves its desired results for the training. This assessment contains a set of 12 important competencies that effective time management training requires. Not all seasoned facilitators have expertise in all of these competencies, but they may represent learning and growth areas for almost any facilitator.

Here is a detailed explanation of the importance of each of the dozen crucial elements of facilitator competence:

- ◆ **Understanding adult learners:** Uses knowledge of the principles of adult learning in both designing and delivering training.

Effective facilitators are able to draw on the experiences of the learners in a training session, and then give them the applicable content and tools to engage them fully and help them see the value of the learning. It is also important to address the participants' various learning styles and provide them with opportunities to solve problems and think critically so they can work through real business issues and develop additional skills.

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- ◆ **Presentation skills:** Presents content clearly to achieve the desired outcomes of the training. Encourages learners to generate their own answers through effectively leading group discussions.

Of all the competencies a facilitator uses during a training session, none may be more obvious than the need to have exceptional presentation skills. The facilitator's ability to present content effectively and in an entertaining way is one of the first things learners notice and is a large part of a successful workshop. The nature of adult learning makes it equally important that the facilitator is not just a talking head, but is also adept at initiating, drawing out, guiding, and summarizing information gleaned from large-group discussions during a training session. The facilitator's role is not to feed answers to learners as if they are empty vessels waiting to be filled. Rather, it is the facilitator's primary task to generate learning on the part of the participants through their own process of discovery.

- ◆ **Communication skills:** Expresses self well, both verbally and in writing. Understands nonverbal communication and listens effectively.

Beyond presenting information and leading discussions, it is vital for a facilitator to be highly skilled in all aspects of communication. He or she should use language that learners can understand; give clear directions for activities; involve trainees through appropriate humor, anecdotes, and examples; and build on the ideas of others. This will lead to training sessions that are engaging and highly valuable for the participants. Facilitators must also be able to listen well and attend to learners' nonverbal communication to create common meaning and mutual understanding.

- ◆ **Emotional intelligence:** Respects learners' viewpoints, knowledge, and experience. Recognizes and responds appropriately to others' feelings, attitudes, and concerns.

Because learners may have many different backgrounds, experience levels, and opinions in the same training sessions, facilitators must be able to handle a variety of situations and conversations well, and be sensitive to others' emotions. They must pay close attention to the dynamics in the room, be flexible enough to make immediate changes to activities during training to meet the needs of learners, and create an open and trusting learning environment. Attendees should feel comfortable expressing their opinions, asking questions, and participating in activities without fear of repercussion or disapproval. Monitoring learners' emotions during a training session also helps the facilitator gauge when it may be time to change gears if conflict arises, if discussion needs to be refocused on desired outcomes, or if there is a need to delve deeper into a topic to encourage further learning.

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- ◆ **Training methods:** Varies instructional approaches to address different learning styles and hold learners' interest.

All trainees have preferred learning styles, and one of the keys to effective training facilitation is to use a variety of methods to address them. Some people are more visual ("see it") learners, and others are more auditory ("hear it") or kinesthetic ("do it") learners. An effective facilitator must be familiar with a variety of training methods to tap into each participant's style(s) and maintain interest during the training session. These methods may include such activities as small-group activities, individual exercises, case studies, role plays, simulations, and games.

- ◆ **Subject matter expertise:** Possesses deep knowledge of training content and applicable experience to draw upon.

Facilitators must have solid background knowledge of the training topic at hand and be able to share related experience to help learners connect theory to real-world scenarios. Anecdotes and other examples to illustrate how the training content relates to participants' circumstances and work can enhance the learning experience and encourage learners to apply the information and also to use the tools they have been given. It is also crucial that facilitators know their topics inside and out, so they can answer the trainees' questions and guide them toward problem-solving and skill development.

- ◆ **Questioning skills:** Asks questions in a way that stimulates learners' understanding and curiosity. Encourages critical thinking.

An effective questioning technique works well to assess learners' understanding of training content. It also provides opportunities for them to analyze information and think critically. When learners ask questions, the facilitator is able to see where there may be confusion or a need to review concepts for better understanding. Similarly, when a facilitator asks thought-provoking questions in a way that invites participation, learners can brainstorm solutions to problems or think about situations to help them apply the training content to the issues they deal with on a regular basis.

- ◆ **Eliciting behavior change:** Influences others effectively both individually and within groups. Gains support and commitment from others to achieve common goals and desired outcomes.

This competency is important in two ways. First, facilitators must be able to persuade trainees to consider points of view that will lead to desired changes in behavior. A facilitator is often called upon to sell an organization's culture or policies, or to gain learners' participation to achieve the desired results of the training. To do this, a facilitator must be able to show that although he or she respects the trainees' views, the trainees must understand and accept the organization's realities and practices.

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Second, an effective facilitator must know how to form small groups and work well with them to influence groups to accomplish tasks, work through problems, and fulfill the needs of the group members. Drawing out the creative energy of groups through brainstorming or other activities, as well as helping group members blend their unique knowledge and skills to achieve a common goal, will lead to greater commitment on behalf of the learners to improve their behavior and apply the training content.

- ◆ **Feedback:** Gives and receives constructive, specific, and timely feedback, and communicates observations clearly and accurately.

It is essential for facilitators to provide learners with helpful feedback, whether formally through an assessment or informally through conversation. Use specific examples to communicate a learner's strengths and weaknesses; this will help the trainee understand the information and may also increase the learner's self-reflection. It can also serve as the basis for a coaching relationship for individual training and clarify what the learner should focus on for his or her growth and development. The facilitator should also be familiar with a variety of tools to gather feedback from training participants to improve the learning experience and the facilitator's own self-reflection and growth.

- ◆ **Motivation:** Encourages learners to participate and achieve desired results. Generates enthusiasm and commitment from others.

It is the training facilitator's responsibility to inspire others to achieve the desired outcomes of a training session and to focus on their goals. Although it is generally believed that motivation comes from within, a skilled facilitator can unleash energy and enthusiasm by creating a vision that inspires the learners. Facilitators can provide meaningful learning activities and infuse fun into the training experience, and they must effectively channel trainees' motivation into a commitment to achieving results.

- ◆ **Organizational skills:** Works in an orderly and logical way to accomplish tasks. Ensures that work is correct and complete. Presents ideas logically and sequentially for learners to understand.

The importance of this competency for facilitators is twofold. First, the facilitator must have good work habits and pay attention to detail. With any training event, many factors are necessary to ensure a successful experience. Work must be done thoroughly and accurately. A well-organized training facilitator typically creates well-organized, professional training. Second, it is important for facilitators to present ideas in a logical, sequential order that allows learners to absorb new content easily and also to be able to retrieve it quickly. This also increases the probability that the learners will actually use the content. The more organized the facilitator, the better.

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- ◆ **Time management:** Plans and uses time effectively. Balances important and urgent tasks and can work on multiple tasks simultaneously.

Facilitators do many things in addition to conducting training sessions. They must also budget their time effectively to address other priorities in their work: Prepare for the training, keep accurate records, analyze assessment data, design new content or activities, and report to the client organization. The most competent facilitators are able to multitask and keep the goals of the learners and client organization in view as much as possible. Good time management helps a facilitator keep track of all there is to do during any given day.

Facilitator Competencies

Instructions: If using this instrument as a self-assessment, place a ✓ in the box to the right of each of the 12 facilitator competencies that best describes your skill level. If using this form to provide feedback to a facilitator, place a ✓ in the box that best fits his or her level of competence in each area.

COMPETENCY	NO EXPERTISE	LITTLE EXPERTISE	SOME EXPERTISE	ADEQUATE EXPERTISE	EXPERT
Understanding adult learners: Uses knowledge of the principles of adult learning when both designing and delivering training.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Presentation skills: Presents content clearly to achieve the desired outcomes of the training. Encourages learners to generate their own answers through effectively leading group discussions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication skills: Expresses self well, verbally and in writing. Understands nonverbal communication and listens effectively.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Emotional intelligence: Respects learners' viewpoints, knowledge, and experience. Recognizes and responds appropriately to others' feelings, attitudes, and concerns.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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COMPETENCY	NO EXPERTISE	LITTLE EXPERTISE	SOME EXPERTISE	ADEQUATE EXPERTISE	EXPERT
Training methods: Varies instructional approaches to address different learning styles and hold learners' interest.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Subject matter expertise: Possesses deep knowledge of training content and applicable experience to draw upon.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Questioning skills: Asks questions in a way that stimulates learners' understanding and curiosity. Encourages critical thinking.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eliciting behavior change: Influences others effectively, both individually and within groups. Gains support and commitment from others to achieve common goals and desired outcomes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feedback: Gives and receives constructive, specific, and timely feedback and communicates observations clearly and accurately.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Motivation: Encourages learners to participate and achieve desired results. Generates enthusiasm and commitment from others.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organizational skills: Works in an orderly and logical way to accomplish tasks. Ensures work is correct and complete. Presents ideas logically and sequentially for learners to understand.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Time management: Plans time effectively. Balances important and urgent tasks and can work on multiple tasks simultaneously.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
