# Facilitation Assessment Template

**Instructions**

The purpose of the assessment template is to help the facilitator and participants to gather and assess relevant information that will affect the design of the facilitated session. Some questions are suitable for discussion directly by the participants, while the facilitator may wish to keep others private.

|  |
| --- |
| **About the Participants**   1. How well do they know each other? 2. What have they worked on together in the past and what were the dynamics of that working relationship (e.g. degree of conflict, teamwork, risk-taking, or communications)? 3. What are the relevant skills and knowledge of each participant? 4. To what extent will the participants be working together after this event? |
| **About the Problem to be Solved**   1. What are the issues or problems that the participants will tackle? 2. What has been done so far? |
| **About the Organizational Context**   1. What pressures or expectations from outside the group are likely to affect this facilitation? 2. What aspects of organizational culture and norms are likely to have a significant influence? 3. What authority structures exist both inside and outside of the group that will affect participants’ ability to communicate openly and make immediate decisions? |
| **Group Context**   1. What personality styles or expected norms, both for individual participants and for the group as a whole, are likely to affect how people behave during the session? 2. What are the apparent strengths and weaknesses of the group related to the topic of this facilitation? 3. What is the group’s developmental stage according to Tuckman’s model? 4. Does the group typically prefer a high context or low context interaction style? 5. To what extent do participants prefer task vs. process orientation? |
| **Facilitator’s Assessment**  How should the facilitation be designed to accommodate the situation described in this assessment? Consider specific facilitation techniques to use, pitfalls to watch out for, and topics to include in the agenda (including ordering and time allocation). |