

Facilitator/ Leadership Observation and Evaluation Form

NAME OF FACILITATOR/COACH BEING OBSERVED: _____ DATE: _____

NAME OF OBSERVER: _____

INSTRUCTIONS:

The following questions are intended to focus your observations toward leadership behaviors as demonstrated in group facilitation. Some of the questions relate specifically to the role of facilitator and others may refer to general behaviors within the group.

If the question is not relevant to the leadership or group experience you observe then leave that question blank. Questions which ask for a response on a continuum from 1-10 can be answered by circling a point along the continuum line. Be sure to complete as many of the open-ended questions as possible.

After using these guides as a template for evaluation ask yourself what are the key issues present and then draft your self-evaluation and partner evaluation.

Contract management:

Did the group establish a formal contract for their operating principles?

If so was the contract owned by the group?

Did the facilitator differentiate between group goals and operating principles?

Was the contract interpreted as an open contract? Were amendments made as a result of new experiences?

Leadership roles of the facilitator and/or behaviors of the team?

I. Briefing

How clearly were guidelines and objectives stated?

How did the facilitator cover safety issues?

How did the facilitator demonstrate a high level of enthusiasm and engagement in the group's process?

Did the briefing include an interaction regarding clarity or understanding?

II. Interventions -

In what ways did you as a facilitator manage the four internal dimensions of high performance?
How did the facilitator assist the team or learning group to understand their own process?

A. Power Shared:

Communication patterns within the group were equally shared?

1 _____ 10

Take a 2 minute segment of active dialogue by the group and chart the number of responses by each group member.

e.g.	Mary	# of responses
	Sam	
	Tasha	

What "voices" are not being heard or valued? any exclusion?

What does this say about the level of cooperation? Is communication shared and inclusive or monopolized and exclusive? What facilitator interventions could be initiated (if needed) to assist the group process.

Leader encouraged equal participation by group members (non-talking behaviors)

1 _____ 10

How often is 'leadership influence distributed? Was the leadership function carried by several key people?
Names:

B. Positive Emotional Climate:

Score the team 1- 10 on one of more of these key principles of creating a positive group climate:

"Caring for others" 1 _____ 10

"Truth Telling" 1 _____ 10

Leadership influence solicited ideas from group members for solutions to the immediate problem.
1_____10

The group encouraged/respected 'freedom of risk taking' among group members.
1_____10

Is there an example of an idea that got thrashed/rejected by the group as soon as it was offered?

Critical thinking or Consequential thinking?
The group explored consequences of various options?
1_____10

Leadership influence assisted the group to construct a step-by-step (start to finish) plan for the problem?
1_____10

What about behavioral indication of:

Impulse delay?

Creativity and brainstorming?

Action vs. deliberation balance?

Endurance?

Evaluation?

III. Debriefing

Was opening statement given to provide context and/or direction

Was isolation for reflection (e.g. journals/solitude) used appropriately?

Leader positioned the group in an eye-contact pattern for any group discussions.
1_____10

What about physical comfort (temp/time/noise/etc.)?

Leader used open-style questions to encourage group discussion.

1 _____ 10

closed questions

well crafted, open

no questions

questions

Were rounds used (voluntary/involuntary)? _____ Was the pass or exit clause voiced? _____

Was an pass option necessary? _____

Leader guided discussion along a path toward identifiable goal

1 _____ 10

How did the facilitator encourage communication during group discussion?

How was a clear action plan identified for the team?