

# Integral Facilitator Self-Assessment

## 20 Archetypes of the Integral Facilitator

The capacity of a group to move through their challenges can be greatly and predictably increased by applying particular tools and skills.

Imagine a painter's pallet. The painter has access to many hues and textures that give life to a certain form---a landscape, portrait, object, or idea. Applying particular colors and at particular times, the artist will have significant impact on how the final product affects a viewer.



During our **Journey of Facilitation and Collaboration Course** at the University of Wisconsin, we teach a series of competencies to encourage groups to evolve into high functioning teams. Like a good painter, you learn how to recognize when a new color should be applied to stimulate, focus, or appreciate. By drawing on competencies at the appropriate time, one may increase the capacity of a group to solve multi-disciplinary, multi-scale and multi-cultural challenges. While certain competencies are emphasized during particular stages of group development, these competencies are not bounded in a certain stage. Often you will employ many competencies. As you move through the weird and wonderful forms of group problem solving, you will carry the entire pallet of colors.

Now you may be asking, "How can it be translated into the way I work as a collaborative leader or facilitator?" Facilitators play many roles as group leaders. For a facilitator to be truly integral, these roles should address the tasks of each quadrant and throughout the levels of group and organizational complexity.

We've identified 20 archetypes and corresponding competencies required of an integral facilitator and mapped them into the four quadrants shown on the next two pages. Understand that we group these not for rigid application to those tasks assigned to each quadrant but in an attempt to organize our thinking and cover all the roles occupied by facilitation.

## Integral Facilitator Self-Assessment

Following the competency map below is an Integral Facilitator's Self-Assessment. Complete this assessment to determine your level of competency for each of these archetypes, then consider the questions that follow to help you craft a develop plan to enhance your skills.

You may freely use this assessment in your classes and organizations to help develop the facilitation skills of others as long as it is presented intact within this document as a whole.

## 20 Archetypes of the Integral Facilitator

### Self-Awareness

#### Core Values & Intentions (The Inner Guide)

- Presence
- Intuition
- Objectivity
- Integrity
- Possibility
- Humor
- Adaptability
- Empathy
- Results
- Mastery

#### Theoretical Knowledge (The Scholar)

- Understand role of facilitator
- Distinguish between content and process
- Fluent in approaches for data generation, grouping, selection, and decision-making
- Know signposts of group dysfunction
- Fluent with Integral Facilitation Model
- Understand stages of group development and how they impact process design and approach
- Know how to work with individuals who are visual, verbal and kinesthetic.
- Know how to facilitate groups that over-process (talk excessively or analyze without decision).

### Task Management

#### Ten Commandments Collaboration (The Pat)

- Manage your ego toward the background
- Follow inner guidance in service to the group
- Be directive on process, impartial on content
- Be confident, secure, and authentic
- Challenge participants to stretch
- Be light with group, serious with task
- Adapt to and be creative with the unexpected
- Honor and respect your participants
- Facilitate progress toward group objectives
- Seek feedback, learning, and coaching

#### Assessment (The Consultant)

- Collaborate with client to build an integral project charter
- Assess personality, behavioral styles, and organization
- Assess and share my biases with client
- Solicit evaluation and make adjustments
- Follow-up to maintain momentum and continuity

#### Process Design (The Architect)

- Negotiate tasks, deliverables, roles & responsibilities
- Design events to achieve clearly defined objectives
- Prepare to unique needs of audience
- Select best resources and processes for event

#### Presentation (The Orator)

- Present with self to connect with others
- Pay attention to audience, one person at a time.
- Comfortable with silence
- Use voice as an instrument

#### Group Memory (The Scribe)

- Effectively use presentation tools
- Accurately, concisely, and clearly record and organize participant inputs

#### Accountability (The Warrior)

- Facilitate accountability for results
- Provide tools to facilitate accountability

#### Roles (The Shape Shifter)

- Transition into other roles as situation dictates
- Modify behavior/style for gender, personality, culture

## 20 Archetypes of the Integral Facilitator (Continued)

### Group Awareness

#### **Listening (The Friend)**

- Attend to whoever is speaking and if distracted reengage with the speaker.
- Listen to grasp significance and meaning of individual participant comments (content) while facilitating.
- Listen for depth and meaning in conversation using non-verbal cues in body language and my intuition.

#### **Inquiry (The Investigator)**

- Question incongruence
- Clarify and reveal assumptions
- Ask open-ended questions to draw out participants
- Concisely summarize key points of discussion

#### **Understanding (The Muse)**

- Read group culture, i.e. norms, patterns, values, power relationships.
- Use and interpret body language to connect and engage.
- Take advantage of “surprises” and “mistakes” in service of group goals.
- Sense group’s energetic state and how it might need to shift to support the current task.
- Sense group’s cognitive and emotional readiness for the task and adjusts approach as necessary.
- Sense group’s readiness based on stage of group development.

#### **Forbearance (The Empath)**

- Be inwardly and outwardly silent to hold space of the group.
- Keep attention on participant, not myself
- Be empathetic, putting yourself in other’s shoes
- Honor participant’s ability to experience and process their thoughts & feelings.

#### **Set (The Shaman)**

- Select and time process to consider group “state”
- Intervene to shift state in support of task
- Employ words, icons, symbols, and activities relevant to group culture
- Create rituals for learning, connection, transition

### Group Management

#### **Setting (The Lover)**

- Model and demonstrate ways to cultivate safety and trust
- Prepare physical environment for mood, culture, and purpose.
- Configure room to support group culture, purpose, and process.

#### **Facilitating Participation (The Magician)**

- Help groups understand the value of full participation through stories, metaphors, and actions.
- Give clear and concise instructions for group activities and check for understanding.
- Clearly summarize key points during dynamic discussions.
- Demonstrate techniques that cultivate a participatory environment.

#### **Facilitating Process (The Guide)**

- Distinguish process from task and content
- Employ the appropriate process tools given the task, culture and individuals in the group.
- Assure the group understands what process it is using and why appropriate.
- Effectively facilitate selected processes to reach the stated goal or task.

#### **Intervention (The Coach)**

- Lay the groundwork for intervention—Permission
- Identify behaviors requiring intervention—Perception
- Weigh decision to intervene—Predicament
- Use an effective intervention method—Process

#### **Conflict Magic (The Mediator)**

- Provide safe environment for conflict to surface.
- Engage participants in a collaborative negotiation process to address key aspects of a conflict.
- Impartially articulate various perspectives of an issue.
- Identify underlying needs and interests of all parties.
- Develop and analyze options and consequences.
- Constructively respond to disagreement in support of learning and group capacity.

#### **Consensus Building (The Guardian)**

- Facilitate understanding of consensus concept
- Know the pros and cons of consensus building and alternative decision-making methods.
- Model positive tone for collaboration.
- Facilitate a consensus building process.
- Facilitate alternative decision-making methods.

## Integral Facilitation Skills Self-Assessment

**Facilitation Skills Assessment. Rate yourself on each of the archetypes, and indicate skill level desired**

- 0 No Skill
- 1 Limited knowledge
- 2 General, conceptual knowledge only.
- 3 Can perform with assistance. Have applied knowledge.
- 4 Can perform without assistance. In-depth knowledge. Leads or directs others in performing.
- 5 Can give expert advice and lead others to perform. Sought by other for consultation and leadership. Have comprehensive knowledge with ability to make sound judgments.

Competency	Score
<b>Self-Awareness</b>	
<b>Core Values &amp; Intentions (The Inner Guide)</b>	
<b>Presence:</b> I can identify and work with my personal patterns, thoughts, and feelings and center or re-center my body and mind when off track.	1 2 3 4 5
<b>Intuition:</b> I am attuned to nuances and actively share my insights in service to the group.	1 2 3 4 5
<b>Objectivity:</b> I release my personal judgments or agenda.	1 2 3 4 5
<b>Integrity:</b> I am true to myself, what I perceive, and capable of standing up for my beliefs.	1 2 3 4 5
<b>Possibility.</b> I believe in the brilliant possibilities and innate intelligence of what a group can achieve or become.	1 2 3 4 5
<b>Humor:</b> I take myself lightly and my work seriously.	1 2 3 4 5
<b>Adaptability:</b> Trusting in the innate intelligence of groups, I am open and adapt to the unexpected.	1 2 3 4 5
<b>Empathy:</b> I relate to the challenging feelings that participants meet in the face of change and conflict. I honor and respect who they are and the values they hold.	1 2 3 4 5
<b>Results:</b> I am committed to helping groups define and achieve its desired results.	1 2 3 4 5
<b>Mastery:</b> I have a beginner’s mind. I am committed to life-long learning, and open to receiving feedback and coaching, from participants and peers alike.	1 2 3 4 5
<b>Theoretical Knowledge (The Scholar)</b>	
I understand the role of facilitator.	1 2 3 4 5
I can distinguish between content and process.	1 2 3 4 5
I’m fluent in idea generation, grouping, selection, and decision-making processes.	1 2 3 4 5
I’m fluent with the Integral Facilitation (four-quadrant) Model.	1 2 3 4 5
I know and actively monitor signposts of group dysfunction.	1 2 3 4 5
I understand stages of group development and how they impact process design and approach.	1 2 3 4 5
I can engage individuals who are visual, verbal and kinesthetic.	1 2 3 4 5
I know how to facilitate groups that over-process (talk excessively or analyze without decision).	1 2 3 4 5
<b>Self-Awareness Score (Your Total/90)</b>	

## Integral Facilitation Skills Self-Assessment (Continued)

<b>Task Management</b>	
<b>The Ten Commandments of Collaboration (The Path)</b>	
I can manage my ego toward the background, quieting this part of myself when necessary.	1 2 3 4 5
I can “turn within” to access inner guidance in service to groups.	1 2 3 4 5
I can be directive on process, impartial on content.	1 2 3 4 5
I am confident, secure, and authentic about who I am and how this influences my facilitation style.	1 2 3 4 5
I can challenge participants to stretch to their full potential.	1 2 3 4 5
I can be light with group, serious with task.	1 2 3 4 5
I can adapt to and be creative with the unexpected.	1 2 3 4 5
I can honor and respect participants.	1 2 3 4 5
I can faithfully facilitate progress toward group objectives.	1 2 3 4 5
I actively seek feedback, learning, and coaching.	1 2 3 4 5
<b>Assessment (The Consultant)</b>	
I can collaborate with a client to build a project charter.	1 2 3 4 5
I can assess personality, behavioral styles, and organizational development using a series of inquiry questions or a client intake interview.	1 2 3 4 5
I can assess and share my biases or conflicts of interest with the client.	1 2 3 4 5
I can solicit evaluation and make adjustments.	1 2 3 4 5
I can follow-up to maintain momentum and continuity between group engagements.	1 2 3 4 5
<b>Process Design (The Architect)</b>	
I can negotiate tasks, deliverables, roles & responsibilities.	1 2 3 4 5
I can design events to achieve clearly defined objectives.	1 2 3 4 5
I can prepare for unique needs, objectives and context of audience.	1 2 3 4 5
I can select best resources (e.g. facilities, staff, equipment) for event from among many available.	1 2 3 4 5
<b>Presentation (The Orator)</b>	
I can be present in a way that builds a personal, genuine connection.	1 2 3 4 5
I can pay attention to audience, one person at a time.	1 2 3 4 5
I can be comfortable with silence.	1 2 3 4 5
I can use voice as an instrument.	1 2 3 4 5
<b>Group Memory (The Scribe)</b>	
I can effectively use presentation tools (such as visuals, whiteboards, or easels).	1 2 3 4 5
I can accurately, concisely, and clearly record and organize participant inputs.	1 2 3 4 5
<b>Accountability (The Warrior)</b>	
I can facilitate individual commitment for tasks, results and next steps.	1 2 3 4 5
I can apply tools or methods to hold participants accountable for commitments made.	1 2 3 4 5
<b>Roles (The Shape Shifter)</b>	
I can transition into other roles as situation dictates, including consultant, coach, or group member.	1 2 3 4 5
I can modify my behavior/style to support organizational type, personality, or culture.	1 2 3 4 5
<b>Self/Task Management Score (Your Total/145)</b>	

## Integral Facilitation Skills Self-Assessment (Continued)

<b>Group Awareness</b>	
<b>Listening (The Friend)</b>	
I can attend to whoever is speaking and if distracted reengage with the speaker.	1 2 3 4 5
I can listen to grasp significance and meaning of individual participant comments (content) while facilitating.	1 2 3 4 5
I can listen for depth and meaning in conversation using non-verbal cues in body language and my intuition.	1 2 3 4 5
<b>Inquiry (The Investigator)</b>	
I can clarify and reveal assumptions.	1 2 3 4 5
I can question incongruence in statements made or actions taken by participants.	1 2 3 4 5
I can ask open-ended questions to draw out participants.	1 2 3 4 5
I can concisely summarize key points of discussion.	1 2 3 4 5
<b>Understanding (The Muse)</b>	
I can read group culture (norms, patterns, values, key power relationships).	1 2 3 4 5
I can use and interpret body language to connect and engage participants.	1 2 3 4 5
I can take advantage of "surprises" and "mistakes" in service of group goals.	1 2 3 4 5
I can sense group's energetic state (e.g. calm, agitated, flowing) and how it might need to shift to support the current task.	1 2 3 4 5
I can sense group's cognitive and emotional readiness for the task and adjusts approach as necessary.	1 2 3 4 5
I can sense the group's readiness to make a change (or take action) based on its stage of group development.	1 2 3 4 5
<b>Forbearance (The Empath)</b>	
I can be inwardly and outwardly silent <b>to hold the space for a group.</b>	1 2 3 4 5
I can keep attention on participants, not myself.	1 2 3 4 5
I can be empathetic, putting myself in another's shoes.	1 2 3 4 5
I can support participant's ability to experience and process their own feelings and thoughts.	1 2 3 4 5
<b>Set (The Shaman)</b>	
I can select and employ processes at the appropriate time that consider group "state" (e.g. calm, agitated, flowing).	1 2 3 4 5
I can intervene to shift a group's state in support of the task.	1 2 3 4 5
I can employ words, icons, symbols, and activities relevant to culture of the group.	1 2 3 4 5
I can create rituals for learning, connection, and transition.	1 2 3 4 5
<b>Group Awareness Score (Your Total/105)</b>	

## Integral Facilitation Skills Self-Assessment (Continued)

<b>Group Process</b>	
<b>Setting (The Lover)</b>	
I can model and demonstrate ways to help cultivate safety and trust.	1 2 3 4 5
I can prepare physical environment for mood, culture, and purpose.	1 2 3 4 5
I can configure room (tables, chairs, etc.) to support group culture, purpose and process.	1 2 3 4 5
<b>Facilitating Participation (The Magician)</b>	
I can help groups understand the value of full participation through stories, metaphors, and actions.	1 2 3 4 5
I can give clear and concise instructions for group activities.	1 2 3 4 5
I can clearly summarize key points as a result of group engagement activities or discussions.	1 2 3 4 5
I can demonstrate techniques that cultivate a participatory environment.	1 2 3 4 5
<b>Facilitating Process (The Guide)</b>	
I can distinguish process from task and content.	1 2 3 4 5
I can select the appropriate process tools given the task, culture and individuals in the group.	1 2 3 4 5
I can ensure the group understands what process it is using and why appropriate.	1 2 3 4 5
I can effectively facilitate selected processes to reach the stated goal or task.	1 2 3 4 5
<b>Intervention (The Coach)</b>	
I can lay the groundwork for intervention by earning standing or <i>permission</i> from the group.	1 2 3 4 5
I can identify behaviors requiring intervention by <i>perceiving</i> when it may be necessary.	1 2 3 4 5
I can weigh the decision to intervene by intentionally grappling, in real time, with the <i>predicament</i> to take action in service to the group.	1 2 3 4 5
I can use words, gestures, or activities to deliver an effective intervention <i>process</i> .	1 2 3 4 5
<b>Conflict Magic (The Mediator)</b>	
I can provide a safe environment for conflict to surface.	1 2 3 4 5
I can engage participants in a collaborative negotiation process to address key issues.	1 2 3 4 5
I can impartially articulate various perspectives of an issue.	1 2 3 4 5
I can identify underlying needs and interests of all parties.	1 2 3 4 5
I can develop and analyze options and consequences.	1 2 3 4 5
I can constructively respond to disagreement in support of learning and group capacity.	1 2 3 4 5
<b>Consensus Building (The Advocate)</b>	
I can teach and help participants understand what consensus is and how to employ it during group decision-making.	1 2 3 4 5
I know pros and cons of consensus building and alternative decision-making methods.	1 2 3 4 5
I can model and reinforce a positive tone to support group collaboration.	1 2 3 4 5
I can facilitate a consensus decision-making process.	1 2 3 4 5
I can facilitate different decision-making methods (e.g. directive, voting, consensus) as needed.	1 2 3 4 5
<b>Group Process Score (Your Total/130)</b>	

# Action Plan

**The three archetypes I'm most going to focus on improving are:**

- 1.**
- 2.**
- 3.**

**Specific skills I plan to develop are:**

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**Specific actions I plan to take:**

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**My Facilitation Goals are:**

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**My plan to practice Facilitation in the next four weeks:**

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**What structure will you put into place to be accountable for this plan?**

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