

**Facilitator/Trainer Assessment Tool**

This tool is a way to evaluate your facilitation and training skills. The evaluation criteria are broken into 6 components. Each component can be evaluated individually or you can use this entire tool for a complete overall evaluation.

## How to use the tool

The Evaluator/Assessor will observe the Facilitator/Trainer leading a session. They will then meet with Facilitator and review the criteria for one or all of the components listed below, sharing what they observed. It is a suggested practice for the evaluator/assessor to ask the trainer/facilitator what worked, and what might they change, before sharing their observations.

This tool can be used for the purposes of self-assessment or external assessment to help ensure continuous improvement in our work.

Facilitator Assessment Tool criteria include:

1. Setting the Stage
2. Methodology and Delivery
3. Philosophy and Attitude
4. Content
5. Teamwork
6. Ethics

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Based on work by The Northwest Institute for Community Health Educators (NICHE) and The Association for Sexuality Education and Training (ASSET)

# Setting the Stage

Date

Facilitator/Trainer Name Evaluator/Assessor Name: Topic/Lesson(s)

Audience # of participants

## Type of Assessment: Select one

* Peer Assessment of a colleague
* Initial ❑ Ongoing
* Self-Assessment
* Other

**Evaluation Criteria** Check what was effective

* Assesses group and individual needs verbally and/or in writing
* Establishes credibility
* Describes objectives
* Outlines agenda
* Establishes group agreements and reiterates them as needed
* Acknowledges possible feelings or differences of opinion
* Establishes an effective learning environment
* Arranges physical environment
* Has materials ready and available for the session
* Has sign-in sheet and any other paperwork available at the start of the session Strengths in Setting the Stage

Areas for improvement in Setting the Stage

Overall, with consideration of all the elements of this competency, how would you assess this trainer’s skills in Setting the Stage?

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Poor |  |  |  |  |  |  |  |  | Excellent |
| 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 10 |

# Methodology and Delivery

Date

Facilitator/Trainer Name Evaluator/Assessor Name: Topic/Lesson(s)

Audience # of participants

## Type of Assessment: Select one

* Peer Assessment of colleague
* Initial ❑ Ongoing
* Self-Assessment
* Other

**Evaluation Criteria** Check what was effective

* Uses an appropriate variety of teaching methods
* Uses interactive methods
* Uses audiovisual equipment skillfully and judiciously
* Uses the resources of the group
* Uses relevant examples
* Adapts curricula for the needs of the audience
* Encourages group to analyze language and teaching methods used
* Explains complex ideas clearly and unambiguously
* Is concise and repeats only when needed
* Straightforward and matter of fact
* Serious and empathetic when appropriate
* Smiles and uses humor appropriately
* States instructions clearly
* Balance of control and spontaneity, revises plans as needed
* Paces the session, begins and ends on time
* Presentation is organized, logical, rational transitions between segments
* Demonstrates comfort with the subject matter
* Communicates that learners can perform new skills and provides feedback as appropriate Strengths in Methodology and Delivery

Areas for Improvement in Methodology and Delivery

Overall, with consideration of all the elements of this competency, how would you assess this trainer’s skills in Methodology and Delivery?

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Poor |  |  |  |  |  |  |  |  |  | Excellent |
| 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

# Philosophy and Attitude

Date

Facilitator/Trainer Name Evaluator/Assessor Name: Topic/Lesson(s)

Audience # of participants

## Type of Assessment: Select one

* Peer Assessment of colleague
* Initial ❑ Ongoing
* Self-Assessment
* Other

**Evaluation Criteria** Check what was effective

* Communicates respect and enjoyment of the audience
* Encourages positive working relationships and open communication
* Communicates respect through language and tone
* Makes clear that assumptions are not being made about learners
* Speaks from own experience (not representative of a whole group)
* Acknowledges the diversity implicit in every group
* Communicates appreciation for diversity
* Uses an anti-bias approach to improving the teaching and learning environment
* Promotes the use of “teachable moments” when or if conflict arises during the session
* Communicates inclusion in language and attitude
* Shows pleasure in teaching and facilitating Strengths in Philosophy and Attitude

Areas for improvement in Philosophy and Attitude

Overall, with consideration of all the elements of this competency, how would you assess this trainer’s skills in Philosophy and Attitude?

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Poor |  |  |  |  |  |  |  |  |  | Excellent |
| 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

# Training Content

Date

Facilitator/Trainer Name Evaluator/Assessor Name: Topic/Lesson(s)

Audience # of participants

## Type of Assessment: Select one

* Peer Assessment of colleague
* Initial ❑ Ongoing
* Self-Assessment
* Other

**Evaluation Criteria** Check what was effective

* Provides accurate information
* Handouts are organized, readable, useful and relevant
* Visuals are organized, readable and visually appealing
* Content is appropriate for audience
* Training content delivered in a meaningful sequence
* There is time for skills building within the agenda
* Defines terminology and avoids acronyms and jargon
* Identifies slang and translates for the audience when necessary
* Can address issues and share resources related to diversity

Strengths in Training Content

Areas for Improvement in Training Content

Overall, with consideration of all the elements of this competency, how would you assess this trainer’s skills in Training Content?

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Poor |  |  |  |  |  |  |  |  |  | Excellent |
| 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

# Teamwork

Date

Facilitator/Trainer Name Evaluator/Assessor Name: Topic/Lesson(s)

Audience # of participants

## Type of Assessment: Select one

* Peer Assessment of colleague
* Initial ❑ Ongoing
* Self-Assessment
* Other

**Evaluation Criteria** Check what was effective

* Appreciates and acknowledges training host organizations or individuals
* Gives useful, concrete feedback to learners and co-trainer(s)
* Gives feedback respectfully and in a timely, appropriate way
* Requests and handles feedback graciously
* Asks for input from the group when answering participants’ questions
* Offers assistance to co-trainer when appropriate
* Negotiates with co-trainer in a respectful way when rearranging the training schedule
* Problem-solves as needed
* Shares in team responsibilities prior and during training Strengths in Teamwork

Areas for improvement in Teamwork

Overall, with consideration of all the elements of this competency, how would you assess this trainer’s skills in Teamwork?

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Poor |  |  |  |  |  |  |  |  |  | Excellent |
| 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

# Ethics

Date

Facilitator/Trainer Name Evaluator/Assessor Name: Topic/Lesson(s)

Audience # of participants

## Type of Assessment: Select one

* Peer Assessment of colleague
* Initial ❑ Ongoing
* Self-Assessment
* Other

**Evaluation Criteria** Check what was effective

* Fosters an effective learning environment
* Exposes learners to range of beliefs, in a fair and respectful way
* Accurately represents own capabilities as a trainer
* Expresses research findings honestly and without distortion
* Acknowledges the authors of training resources, materials, and activities
* Attempts to recognize own cultural assumptions
* Acknowledges and follows pertinent laws and policies Strengths in Ethics

Areas for improvement in Ethics

Overall, with consideration of all the elements of this competency, how would you assess this trainer’s skills in this area?

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Poor |  |  |  |  |  |  |  |  |  | Excellent |
| 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |