

Facilitating the Self-Assessment Process

The purpose of conducting a self-assessment as a facilitated conversation is to have a free-flow of ideas to generate evidence of successes or challenges in specific areas.

For example, a key indicator under Shared Vision is:

“Our Vision represents input from a broad range of people in the community”

Responses will be in the form of specific evidence such as: “We have an Outreach Team that actively conducts outreach events and activities that engages different community groups.” This would be evidence. We record it as a SUCCESS.

In this conversation style, the free flow of ideas may result in participants naming difficulties the group is having in this area. An example of this kind of response might be: "You know, we haven't done enough about seeking input from young people with opportunities to participate in collaborative activities." We record this as a CHALLENGE.

Because we always want to build on our strengths to overcome our challenges, recording these simultaneously facilitates the next level of discussion, which is ACTION.

We record an ACTION and ask if there's a person who is willing to take the LEAD to move this action forward.

Recording Guidelines

1. Use three flipcharts side by side (or draw columns on one piece of flipchart paper)
2. Facilitator records Successes while facilitating discussion
3. Recorder records Challenges as they come up
4. When Successes and Challenges are named, record the Action and the name of the person willing to take the Lead. Actions typically are ideas that will help overcome challenges. Actions also may build on or expand successes.

SUCCESSES	CHALLENGES	ACTION/LEAD

Creating the Action Plan

In Action Planning, we identify "who will do what by when."

1. Take the Action and Lead information from the self-assessment documentation.
2. Prioritize Actions. There are many ways to prioritize actions, for example, resources, avoiding duplication of efforts, acknowledging best practices. A really effective way to prioritize actions is to see which actions have someone's name attached to them. If someone has the energy and desire to take a strategy on, include it in your action planning.
3. Create an Action Planning grid from prioritized actions.
4. Incorporate your actions into your collaborative plans.

Example:

Action (Milestones)	Lead (Who?)	Timeline (By when?)
Establish a "Youth engagement" team	Recruitment Coordinator	July 1, 2009
Determine what existing youth groups are in the community	Collaborative members	July 30, 2009
Develop/revise outreach materials and activities that are accessible to young people	Youth engagement team	August 15, 2009
Map assets and interests of youth and invite young people to upcoming collaborative meeting/event	Youth engagement team/Collaborative members	Through September 30, 2009
Evaluate Results	Collaborative	October meeting

