

Facilitator Training Guide: Strategic Action Assessment System

A comprehensive guide for training facilitators to implement the SolarPunk Sangha Strategic Action Assessment methodology

Overview: What We're Training For

This system transforms abstract sustainability frameworks into practical implementation support. Facilitators learn to guide participants through honest self-assessment, peer support, and strategic action planning that significantly increases success rates.

Core Philosophy: Assessment serves empowerment, not gatekeeping. We help people succeed, not exclude them.

Training Program Structure

Pre-Training Preparation (Self-Study)

Time Required: 3-4 hours over 1 week

Materials to Study:

1. Full Strategic Action Assessment Tool (detailed version)
2. Quick Assessment & Facilitator Guide
3. Assessment Domain Posters
4. Success Tracking System overview
5. Sample strategic actions from SolarPunk Sangha catalogue

Reflection Questions for Trainees:

- What sustainability frameworks am I already familiar with?
- What facilitation experience do I bring to this work?
- What aspects of this methodology feel challenging or exciting?
- How might this approach benefit my community context?

Self-Assessment Exercise: Complete the full Strategic Action Assessment for a strategic action you're personally interested in. Note:

- Where did you feel uncertain about scoring?

- What support would you have wanted as a participant?
 - Which domains felt most/least familiar to assess?
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Training Day 1: Foundation & Philosophy (6 hours)

Morning Session: Understanding the System (3 hours)

Opening Circle (30 minutes)

Introductions including:

- Name and community context
- Facilitation experience background
- One strategic action you're personally passionate about
- What drew you to this training

Training agreements:

- Vulnerability and honest self-reflection
- Learning through practice, not just theory
- Supporting each other's growth as facilitators
- Commitment to participant empowerment over assessment perfectionism

Framework Foundation (90 minutes)

The Integration Challenge (20 minutes)

- Problem: Participants get inspired by workshops but struggle with implementation
- Traditional approach: Choose framework, apply it
- Integration approach: Use multiple frameworks as lenses for readiness assessment

Framework Overview (70 minutes) Interactive exploration of how each framework contributes:

Circles of Sustainability (15 minutes)

- Hands-on activity: Take a current local issue, map it across all four domains
- Discussion: How does this shift from single-issue to systems thinking?
- Facilitator insight: Helps participants anticipate ripple effects

UN SDGs & Human Rights (15 minutes)

- Activity: Match strategic actions from catalogue to SDGs and rights
- Discussion: How does this connect local action to global movements?
- Facilitator insight: Provides vision alignment and legitimacy

EU Competency Framework (15 minutes)

- Self-assessment: Rate yourself on key competencies
- Discussion: Which competencies do you want to develop?
- Facilitator insight: Helps participants honestly assess capacity

Life Course Methodology (10 minutes)

- Reflection: How has your activism capacity changed across life stages?
- Discussion: Why does life stage matter for action sustainability?
- Facilitator insight: Prevents overcommitment and supports self-care

Green New Deal Principles (15 minutes)

- Activity: Evaluate a strategic action against GND principles
- Discussion: How do these principles shape action design?
- Facilitator insight: Ensures justice and systems change focus

Break (15 minutes)

Assessment Philosophy (45 minutes)

Core Principles (15 minutes)

- **Assessment serves empowerment:** We help people succeed, not exclude them
- **Gaps are information, not judgment:** Low scores show learning opportunities
- **Community support is essential:** Individual readiness + collective support = success
- **Honest assessment prevents burnout:** Better to prepare well than fail exhaustively
- **Multiple intelligences matter:** Different people bring different strengths

Common Facilitator Pitfalls (15 minutes)

- **Perfectionism paralysis:** Requiring high scores before action
- **Individual focus:** Forgetting community support can address gaps
- **Academic approach:** Teaching frameworks instead of supporting assessment
- **Advice-giving:** Telling people their scores instead of guiding self-discovery

- **Rush to action:** Skipping reflection for enthusiasm

Participant Emotional Journey (15 minutes) Understand typical responses and how to support them:

- **Initial excitement:** "I want to do everything!"
- **Assessment reality:** "Oh, this is more complex than I thought"
- **Discouragement:** "Maybe I'm not ready for this"
- **Strategic clarity:** "Now I know what I need to learn"
- **Community connection:** "I don't have to do this alone"

Afternoon Session: Practice & Application (3 hours)

Experiencing the Assessment (60 minutes)

Individual Assessment (20 minutes) Trainees complete quick assessment for their chosen strategic action

Peer Consultation (20 minutes)

Practice the peer consultation process as participants

Community Mapping (20 minutes) Use sticky notes to map group strengths and development needs

Debrief as Facilitators (Discussion)

- What did you notice about your own resistance or enthusiasm?
- Where did you want more guidance or support?
- What felt most/least useful about each activity?

Facilitation Skills Deep Dive (90 minutes)

Creating Psychological Safety (30 minutes) Role-play scenarios:

- Participant deflates after seeing low scores
- Someone dismisses assessment as "too academic"
- Group member dominates discussion
- Conflict emerges between participants with different approaches

Practice key responses:

- "Low scores aren't judgment, they're information about where to focus learning"
- "What would honoring both urgency and strategy look like?"
- "How might we support each other's different strengths?"

Asking Powerful Questions (30 minutes) Practice moving from advice-giving to inquiry:

Instead of: "You should focus on building your community support"

Try: "What would it take to move from yellow to green in community support?"

Instead of: "That action seems too ambitious"

Try: "Help me understand what draws you to this particular action"

Instead of: "You need more skills first"

Try: "What support would help you develop the skills this action requires?"

Managing Group Energy (30 minutes) Techniques for different energy states:

- **High enthusiasm, low strategy:** Channel excitement into planning
- **Analysis paralysis:** Move from thinking to feeling/sensing
- **Discouragement:** Focus on community support and small wins
- **Conflict/disagreement:** Find shared values, separate positions from interests

Break (15 minutes)

Workshop Flow Practice (75 minutes)

Micro-Teaching Rounds (45 minutes) Each trainee facilitates one 15-minute segment:

- Individual assessment explanation
- Community mapping activity
- Peer consultation instructions
- Closing commitment ceremony

Feedback Structure:

- 2 minutes: What worked well
- 2 minutes: One specific suggestion for improvement
- 1 minute: Appreciation

Full Run-Through Planning (30 minutes) In pairs, plan complete 90-minute workshop including:

- Timing for each segment
- Transition language between activities
- Materials and space setup
- Contingency plans for common challenges

Training Day 2: Advanced Skills & Adaptation (6 hours)

Morning Session: Customization & Context (3 hours)

Adapting to Different Communities (90 minutes)

Context Assessment (*30 minutes*) Before running workshops, facilitators assess:

Community Characteristics:

- Size and demographics
- Previous workshop/organizing experience
- Current issues and energy levels
- Existing leadership and decision-making culture
- Resource availability and constraints

Cultural Considerations:

- Communication styles (direct vs. indirect)
- Time orientation (flexible vs. punctual)
- Authority relationships (hierarchical vs. egalitarian)
- Conflict approaches (avoidance vs. engagement)
- Learning preferences (individual vs. collective)

Adaptation Strategies (*60 minutes*)

For Different Group Sizes:

- **Small groups (6-12):** More intimate sharing, extended discussions
- **Medium groups (13-25):** Breakout pairs, carousel stations
- **Large groups (26+):** Facilitate in teams, use technology for mapping

For Different Experience Levels:

- **New activists:** Focus on skill-building, provide more structure
- **Experienced organizers:** Emphasize systems thinking, peer teaching
- **Mixed groups:** Pair experienced with newcomers, multiple learning tracks

For Different Cultural Contexts:

- **Collective cultures:** Emphasize group assessment, consensus building
- **Individual cultures:** Honor personal reflection, individual goal-setting
- **Hierarchical cultures:** Work with existing leaders, respect authority patterns
- **Egalitarian cultures:** Distribute leadership, encourage all voices

Break (15 minutes)

Troubleshooting Scenarios (75 minutes)

Challenge Scenarios Practice (60 minutes) In small groups, develop responses to:

Scenario 1: Participant becomes defensive about low scores, argues assessment is biased **Scenario**

2: Group gets stuck in analysis, won't move to action planning

Scenario 3: Someone dominates discussion, others withdraw **Scenario 4:** Conflict emerges between

participants advocating different strategic actions **Scenario 5:** Virtual workshop with technical

difficulties and low engagement **Scenario 6:** Community with recent trauma or conflict affecting trust levels

Response Framework:

- Immediate response: What do you say/do in the moment?
- Underlying need: What might this behavior indicate?
- Systemic approach: How do you address the pattern, not just the incident?
- Prevention: How might you design to avoid this challenge?

Whole Group Sharing (15 minutes) Each small group shares one scenario and response for whole group refinement

Afternoon Session: Implementation & Sustainability (3 hours)

Success Tracking & Data Collection (90 minutes)

Why Track Success (20 minutes)

- Improve assessment accuracy over time
- Demonstrate methodology value to funders/partners
- Build community learning and confidence
- Refine workshop design based on outcomes
- Scale effective practices to other communities

Data Collection Ethics (25 minutes)

- Informed consent for tracking participation
- Anonymization and privacy protection
- Community ownership of aggregated data
- Transparency about how data is used
- Right to withdraw from tracking at any time

Practical Implementation *(45 minutes)*

During Workshop:

- Initial assessment score collection
- Development priority identification
- Community support request documentation
- Commitment recording

Follow-up Systems:

- 2-week check-in via email/phone (script practice)
- 3-month survey design and distribution
- 6-month interview/focus group facilitation
- Story collection and case study development

Data Analysis Skills:

- Spreadsheet setup and management
- Pattern recognition in assessment scores vs. outcomes
- Qualitative theme identification
- Community report writing and presentation

Break *(15 minutes)*

Building Facilitator Community *(75 minutes)*

Ongoing Learning Network *(30 minutes)*

- Monthly video calls for case consultation
- Shared resource library development
- Peer observation and feedback system
- Annual in-person gathering for methodology refinement

Mentorship System *(20 minutes)*

- New facilitators paired with experienced ones
- Gradual independence pathway: observe → co-facilitate → lead → mentor
- Regular check-ins and skill development planning
- Crisis consultation availability

Innovation and Adaptation *(25 minutes)*

- Documentation system for local adaptations
 - Testing and refinement process for tool improvements
 - Community of practice for methodology evolution
 - Research collaboration opportunities
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Post-Training Support System

First Workshop Support (Intensive)

Pre-Workshop (1 week before):

- 30-minute planning call with mentor
- Materials review and customization guidance
- Participant communication template review
- Backup plan development

During Workshop:

- Mentor available via text for urgent consultation
- Post-workshop debrief call within 48 hours
- Troubleshooting support for unexpected challenges

Post-Workshop (2 weeks after):

- Follow-up system implementation support
- Data collection guidance
- Participant tracking setup assistance

Ongoing Development Support

Monthly Community Calls (*90 minutes*)

- Case consultation for challenging situations
- Success story sharing and learning
- Tool refinement based on collective experience
- New resource sharing and skill building

Quarterly Skill Development (*3 hours*) Rotating topics based on facilitator needs:

- Advanced conflict resolution in workshop settings
- Cultural competency and anti-oppression facilitation
- Virtual workshop mastery
- Data analysis and community reporting
- Workshop design for specific populations

Annual Gathering (*2 days*)

- In-person connection and relationship building
- Methodology refinement based on year's learning
- Advanced facilitation skill development
- Strategic planning for network growth

Certification and Recognition

Basic Certification Requirements:

- Complete 2-day training
- Co-facilitate one workshop with mentor
- Successfully facilitate one independent workshop
- Complete 3-month follow-up tracking with participants
- Participate in 3 monthly community calls

Advanced Certification Requirements:

- Basic certification plus:
- Facilitate 5 workshops independently
- Mentor one new facilitator through their certification

- Contribute one innovation/adaptation to methodology
- Present learning at annual gathering

Continuing Education:

- Annual re-certification through participation in ongoing support
 - Advanced training opportunities in specialized applications
 - Research collaboration and methodology development participation
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Training Materials Checklist

For Trainers to Prepare

Documents:

- ☐ Full assessment tool (detailed version)
- ☐ Quick assessment sheets (multiple copies)
- ☐ Assessment domain posters (printed large format)
- ☐ Strategic action catalogue (sample selections)
- ☐ Facilitator guide with timing
- ☐ Success tracking templates

Supplies:

- ☐ Sticky notes (5 colors, multiple pads)
- ☐ Markers (thick tip, multiple colors)
- ☐ Flip chart paper
- ☐ Name tags and pens
- ☐ Timer or bell for transitions
- ☐ Masking tape for wall posting

Technology:

- ☐ Laptop/projector for presentations
- ☐ Video conferencing setup for virtual training elements
- ☐ Shared digital workspace (Google Drive, etc.)
- ☐ Contact management system for ongoing support

For Trainees to Receive

Take-Home Packet:

- ☐ All assessment tools in digital and print format
- ☐ Community adaptation guide
- ☐ Success tracking system overview
- ☐ Monthly call schedule and connection info
- ☐ Mentor contact information
- ☐ Certification pathway overview

Digital Access:

- ☐ Shared resource library
 - ☐ Template collection (emails, surveys, etc.)
 - ☐ Video recordings of training sessions
 - ☐ Community forum or discussion platform
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Quality Assurance & Continuous Improvement

Monitoring Training Effectiveness

Trainee Feedback Collection:

- End-of-training evaluation
- 1-month post-training check-in
- 6-month impact assessment
- Annual satisfaction and development needs survey

Workshop Quality Tracking:

- Participant satisfaction scores from workshops led by trainees
- Implementation success rates by facilitator
- Common challenges encountered across facilitators
- Innovations and adaptations developed locally

Methodology Evolution

Research Integration:

- Academic partnerships for methodology study
- Conference presentations and peer review
- Publication of learning and outcomes

- Integration with broader social change methodologies

Community Feedback Loops:

- Regular surveys of workshop participants about facilitator effectiveness
- Focus groups on assessment tool accuracy and usefulness
- Community input on methodology improvements
- Transparent reporting of success rates and challenges

Innovation Encouragement:

- Recognition system for effective local adaptations
 - Resource support for promising methodology experiments
 - Documentation and sharing of successful innovations
 - Integration of proven improvements into core training
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Conclusion: Supporting Facilitator Success

The goal is not to create perfect facilitators, but to develop a learning community that continuously improves its capacity to support strategic action implementation. Every facilitator brings unique gifts and perspectives that strengthen the overall methodology.

Remember:

- Start where you are, with what you have
- Prioritize participant empowerment over perfect technique
- Build community among facilitators - you don't do this work alone
- Stay curious about what works in your context
- Share your learning to strengthen the whole network

The assessment system serves the facilitator community just as it serves workshop participants - as a tool for honest reflection, strategic development, and mutual support toward more effective social change work.