

In preparation for the assessment, you may be asking yourself - What am I being assessed against? What is the criteria that I am assessed by? This document is designed to provide clarity on the criteria and help you prepare for your assessment.

Tactical Assessment

	Fail	Pass
Introductions	Does something horribly wrong that creates a weird energy for the meeting	Candidate conveys competence and sets appropriate expectations (e.g. purpose of meeting, learning vs. getting work done, timeouts, etc.).
Check-in	Check-in process feels off or weird; as if the meeting would have been better without it	Role-models an effective check-in, may get a little too personal, but sets an appropriate expectation and energy for the meeting

Scoring Rules

- The scoring range is 0-11; and on each criteria 1 is Facilitator Level and 2 is Coach Level.
- Facilitator Level: Must get a score of 1 on at least 4 out of 6 criteria (minimum total score = 4) , AND must not get a 0 score on criteria #1 or #6.
- Coach Level (must first meet Facilitator Level): Must have scored a 2 on 3 out of 6 criteria (minimum total score = 9), AND must have at least a score of 1 on every criteria.

- For Facilitator or Coach Level, the candidate must have passed the criteria according to both assessors.
- Final score is the highest score given by EITHER assessor.

Scoring Criteria				
#		Novice (0)	Facilitator (1)	Coach (2)
1	Mechanics	Violates basic rules defined by the Constitution	Holds to the basic requirements of the tactical meeting process; works effectively with the Secretary to navigate Glassfrog and capture outputs	-
2	Support	Rigid facilitation with little or no framing or explanations; it feels difficult to be a "good" participant	Uses adequate framing & energy to make it fairly easy for participants to see how the process works	Approaches the meeting as a learning experience; comfortable pace without sacrificing processing time
3	Powershift	Makes no or very little attempt to clarify typical powershift issues	Tends to call timeouts, and/or explain powershift conceptually; and misses key opportunities	Highlights specific powershift issues through skillful questions and redirections
4	Differentiation	Makes no or very little attempt to clarify roles and people	Highlights differentiation issues, though may be awkward in doing so	Skillfully navigates the group to the role-structure without making it painful
5	Involvement	Easily gets too involved in interpreting the issues for the group and actually shuts out participants or is barely involved	A balance of involvement; sometimes maybe too involved in interpreting the	Neutral, but proactive; not pushed around, and not needlessly rigid, and not sucked into the issues

		expecting participants to facilitate themselves.	issue, sometimes not involved enough	
6	Explanations	Communicates major misunderstandings of Holacracy's core rules or paradigm shift	No major misunderstandings, but may talk too much about philosophical or other elements	Able to succinctly and accurately convey rules and elements