

OD Practitioner Self-Assessment.

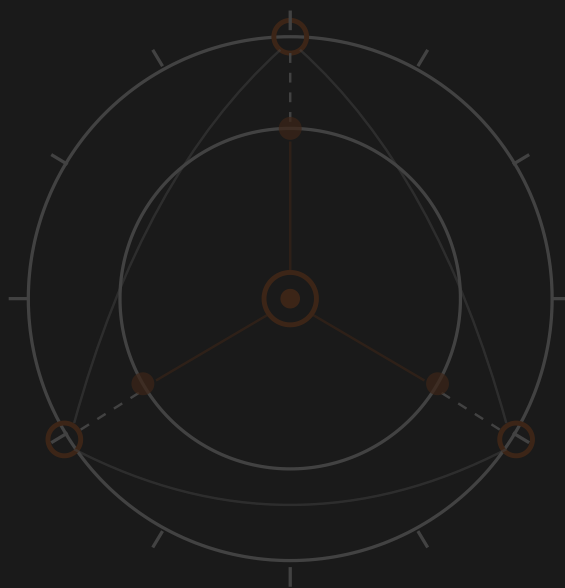
A reflective development tool for OD practitioners. Use it to get an honest picture of where you are in your practice, where you want to go next, and what that development looks like in practice.

YOUR NAME

YOUR ROLE

ORGANISATION

DATE COMPLETED



How to use this assessment

PURPOSE

This is a reflective development tool, not a performance assessment. Use it to gain an honest picture of where you are in your OD practice and to identify the development that would make the greatest difference to your effectiveness. Be honest rather than aspirational.

HOW TO RATE YOURSELF

Read all four level descriptors for each competency area before selecting a rating. Choose the level that best describes your consistent, evidenced practice: the level you operate at reliably, not occasionally. If you are between levels, rate at the lower level.

RECORDING YOUR RATING

Circle or tick the relevant level label in the rating column on each competency page. Use the reflection space to note specific evidence for your rating, identify development priorities, and record any actions you want to take.

USING YOUR RESULTS

Complete the summary page at the end to see your overall profile across all eight competency areas. Share your results with your line manager, supervisor, or coach to inform a development conversation. Return to the assessment in 6–12 months to track progress.

LEVEL	WHAT IT MEANS	TYPICAL CAREER STAGE
Foundation	Building awareness and early practice. Working with guidance. Theory and practice are beginning to connect.	New to OD, or transitioning from a generalist HR/L&D background. Typically 0–2 years in an OD-specific role.
Developing	Applying skills with increasing confidence. Working independently on straightforward OD challenges. Beginning to adapt and respond in real time.	Building an OD specialism. Typically 2–5 years of OD practice with a broadening portfolio of interventions.
Proficient	Skilled and confident practitioner. Handles complexity and ambiguity. Evidence-informed. Helps others develop their practice.	Established OD practitioner. Typically 5+ years of practice with experience of significant, systemic OD work.
Expert	Masterful practitioner and developer of others. Embeds OD thinking into the organisation. Contributes to sector-wide standards and practice.	Senior OD leader or specialist with a track record of complex, whole-system change and practitioner development.

This assessment is grounded in the CIPD Profession Map (OD&D specialist knowledge), Roffey Park's Making Sense of OD, The OD App Global Competency Framework, the TD/ASTD Competency Model for OD Practitioners, and AIHR organisational development research.

OD Theory and Knowledge Base

A grounded OD practitioner draws on a working knowledge of behavioural science and OD theory to make sense of organisational challenges and design appropriate interventions. This includes familiarity with foundational models: **Lewin's Force Field Analysis and Three-Step Change Model, the Burke-Litwin Causal Model, McKinsey's 7S Framework, Weisbord's Six-Box Model, and Nadler-Tushman's Congruence Model**, as well as contemporary approaches including **Dialogic OD, Appreciative Inquiry, Human Systems Dynamics, and Complexity theory**. Theory is not academic decoration. It is the lens through which a practitioner observes, diagnoses, and designs.

LEVEL	DESCRIPTOR	RATING
Foundation	Aware of key OD models by name: Lewin, Burke-Litwin, and Appreciative Inquiry and can describe their broad purpose. Draws on one or two familiar frameworks when making sense of organisational situations, though application is tentative and often needs guidance. Theory and practice feel separate rather than integrated.	<input type="radio"/>
Developing	Has working knowledge of a range of OD theories and models and can select an appropriate framework for a given situation. Applies Lewin's Force Field Analysis to understand driving and restraining forces. Uses Burke-Litwin or 7S to structure diagnostic thinking. Beginning to draw on Dialogic OD or Appreciative Inquiry in facilitated conversations. Can articulate why a theoretical lens has been chosen.	<input type="radio"/>
Proficient	Applies multiple theoretical frameworks with confidence and explains their relevance to colleagues and clients. Moves between diagnostic models (e.g. Nadler-Tushman congruence analysis) and dialogic approaches (e.g. Appreciative Inquiry, Open Space) depending on the nature of the challenge. Stays current with emerging OD thinking: including complexity theory and Human Systems Dynamics, and integrates new learning into practice. Helps others understand how theory informs intervention design.	<input type="radio"/>
Expert	Operates from a deep, integrated theoretical base and actively contributes to the field's development. Coaches other practitioners to select and apply OD theory with rigour and intentionality. Challenges superficial or tool-heavy approaches and role-models theory-informed practice. Creates learning environments where OD frameworks are used by the client system itself , building the organisation's capacity to make sense of its own dynamics rather than remaining dependent on external expertise. Contributes to sector discourse on emerging OD theory and practice.	<input type="radio"/>

EVIDENCE AND REFLECTION: WHAT TELLS YOU THIS IS YOUR LEVEL? WHAT WOULD DEVELOPMENT LOOK LIKE?

Diagnosis and Systems Thinking

Effective OD begins with rigorous diagnosis: understanding the organisation as a system of interdependent parts rather than isolated problems. This requires fluency in systems thinking frameworks such as the **Burke-Litwin model, Soft Systems Methodology, Iceberg Models of organisational culture, and Causal Loop Diagrams**. A skilled OD practitioner can identify leverage points, surface hidden dynamics, and understand how change in one part of the system ripples through others. Diagnosis is done with the system, not to it.

LEVEL	DESCRIPTOR	RATING
Foundation	Understands that organisations are systems and that problems rarely exist in isolation. Can describe the concept of interdependency. Collects basic diagnostic information through observation, conversations, and available data, but may focus on presenting symptoms rather than systemic causes.	<input type="radio"/>
Developing	Uses structured diagnostic frameworks (Burke-Litwin, Weisbord's Six-Box Model) to map organisational challenges across multiple system components. Distinguishes between technical and adaptive problems. Conducts diagnostic interviews and focus groups and synthesises findings into a coherent picture. Begins to surface informal dynamics: culture, relationships, and power, alongside formal structures.	<input type="radio"/>
Proficient	Applies a systems thinking lens consistently and confidently. Uses multiple diagnostic tools simultaneously and triangulates findings across formal data, qualitative insight, and direct observation. Names and works with patterns, informal dynamics, and shadow systems. Identifies high-leverage intervention points rather than responding to surface-level symptoms. Shares diagnostic thinking transparently and co-constructs the picture with clients rather than presenting a completed analysis.	<input type="radio"/>
Expert	Demonstrates exemplary systems diagnosis integrating hard data, qualitative evidence, and systemic pattern recognition. Coaches others to think systemically : challenging linear cause-effect thinking and developing the diagnostic capability of teams and leaders. Models complexity-aware practice: comfortable with ambiguity, paradox, and emergent understanding. Embeds diagnostic discipline into the organisation's own ways of working so that systemic thinking becomes a leadership and management habit rather than a specialist OD intervention.	<input type="radio"/>

EVIDENCE AND REFLECTION: WHAT TELLS YOU THIS IS YOUR LEVEL? WHAT WOULD DEVELOPMENT LOOK LIKE?

Intervention Design and Delivery

OD interventions range from large-scale whole-system processes: **Future Search, Open Space Technology, World Café, Real-Time Strategic Change, Appreciative Inquiry Summits**) to targeted team, leadership, or culture interventions. Skilled practitioners design interventions that are theory-informed, co-created with the client system, and responsive to what emerges. They distinguish between **prescriptive (expert-led)** and **facilitative (client-owned)** approaches and make deliberate choices about which is appropriate. Evaluation is designed in from the start, not added retrospectively.

LEVEL	DESCRIPTOR	RATING
Foundation	Can deliver structured, pre-designed interventions (team away days, workshops, facilitated conversations) competently when given a clear brief. Follows established processes and uses familiar tools. Beginning to understand that good intervention design starts with clear purpose and diagnostic insight rather than the selection of a preferred technique.	<input type="radio"/>
Developing	Designs straightforward interventions aligned to a diagnosed need and grounded in a theoretical rationale. Selects from a broadening toolkit: large-group methods, action learning sets, structured dialogue, and appreciative inquiry processes. Involves stakeholders in shaping the design. Adapts delivery in real time when the group or situation requires it. Can articulate the intended mechanism of change for a given intervention.	<input type="radio"/>
Proficient	Designs and delivers complex, multi-stage OD interventions with confidence. Balances diagnostic, dialogic, and action-oriented phases appropriately. Co-creates intervention design with client stakeholders rather than presenting a fixed plan. Builds evaluation into intervention design from the outset. Handles resistance, conflict, and unexpected emergence within an intervention without losing the thread of the work.	<input type="radio"/>
Expert	Designs sophisticated, whole-system interventions that build the organisation's own capacity for change rather than creating dependency on OD expertise. Coaches other practitioners in intervention design: developing their ability to hold the space, adapt in real time, and make values-consistent choices under pressure. Embeds OD approaches into the organisation's standard ways of operating: leadership team rhythms, planning cycles, and performance conversations all carry an OD quality.	<input type="radio"/>

EVIDENCE AND REFLECTION: WHAT TELLS YOU THIS IS YOUR LEVEL? WHAT WOULD DEVELOPMENT LOOK LIKE?

Facilitation and Group Process

Facilitation is one of the most critical OD skills: the ability to design and hold a process that enables a group to think, dialogue, decide, and learn together. Skilled facilitation draws on **group dynamics theory (Tuckman, Bion, Lewin's T-groups), process consultation (Schein), and psychological safety research (Edmondson)**. It is distinct from chairing, training, or presenting. The facilitator's role is to serve the group's process, not to drive its content. The facilitator uses their own reactions as data.

LEVEL	DESCRIPTOR	RATING
Foundation	Can facilitate straightforward group processes (structured discussions, brainstorming sessions, team meetings) with support. Manages participation at a basic level. Is aware of group dynamics but not yet confident in naming or working with them in the moment. Tends to follow a pre-planned agenda closely rather than responding to what is emerging in the room.	<input type="radio"/>
Developing	Facilitates a range of group processes with increasing confidence. Manages dominant voices and draws out quieter contributions. Uses process tools: breakout groups, paired reflection, structured rounds, purposefully. Beginning to notice and name group dynamics (e.g. avoidance, conflict, dependency) and make real-time adjustments. Holds space for difficult conversations without rescuing the group from productive discomfort.	<input type="radio"/>
Proficient	Facilitates complex, high-stakes group processes (including conflict, systemic resistance, and cross-organisational dialogue) with skill and composure. Applies Schein's process consultation approach: stays curious about the group's process without taking ownership of its content. Works with the whole room: physical space, silence, energy, and subgroup dynamics as facilitation data. Builds psychological safety deliberately and monitors its presence throughout.	<input type="radio"/>
Expert	Operates as a masterful facilitator in the most complex and contested group situations. Coaches other facilitators to develop their craft , including their use of self as an instrument of facilitation. Actively embeds facilitative approaches into the organisation's leadership culture : team meetings, governance processes, and decision-making forums all carry the quality of genuine dialogue rather than performative agreement. Recognised across the sector for the quality and impact of their facilitation practice.	<input type="radio"/>

EVIDENCE AND REFLECTION: WHAT TELLS YOU THIS IS YOUR LEVEL? WHAT WOULD DEVELOPMENT LOOK LIKE?

Consultancy and Contracting

OD practitioners operate as internal or external consultants: entering client systems, building trust, scoping work, managing expectations, and exiting cleanly. Effective contracting draws on **Schein's process consultation model and Block's Flawless Consulting framework**, establishing clarity about purpose, process, roles, and boundaries before work begins. The OD consultant's currency is influence rather than authority. Relationship quality and psychological contracting matter as much as the formal agreement.

LEVEL	DESCRIPTOR	RATING
Foundation	Understands the distinction between prescriptive (expert) and facilitative (process) consultancy. Can carry out basic scoping conversations and clarify what is being asked of them. Beginning to contract explicitly: naming roles, boundaries, and expected outputs, with guidance. Aware that entry into a client system requires care and that the presenting problem is rarely the whole story.	<input type="radio"/>
Developing	Conducts structured contracting conversations that cover purpose, process, roles, boundaries, and success criteria. Distinguishes between the presenting problem and the underlying organisational need. Builds working relationships with clients based on transparency and trust. Navigates entry into new client systems with increasing confidence. Beginning to manage scope creep and to renegotiate the contract when the work evolves.	<input type="radio"/>
Proficient	Contracts with sophistication, attending to formal, psychological, and ethical dimensions simultaneously. Uses Block's Flawless Consulting framework to structure engagement. Holds the consulting relationship with appropriate boundaries. Names and works with organisational politics, hidden agendas, and competing stakeholder interests without becoming triangulated. Exits engagements cleanly, transferring ownership and capability to the client system.	<input type="radio"/>
Expert	Models exemplary consulting practice and actively develops the consulting capability of other OD practitioners. Coaches colleagues in contracting, boundary management, and the use of self in the consulting relationship. Challenges the organisation's commissioning culture: advocating for OD ways of working in how change projects are scoped, governed, and evaluated. Contributes to sector-level thinking on ethical OD practice, including issues of power, access, and the practitioner's responsibility to the wider system.	<input type="radio"/>

EVIDENCE AND REFLECTION: WHAT TELLS YOU THIS IS YOUR LEVEL? WHAT WOULD DEVELOPMENT LOOK LIKE?

Data, Evidence and Evaluation

Evidence-informed practice is central to credible OD. This means collecting, analysing, and acting on multiple forms of data: quantitative (workforce analytics, surveys, survey data, outcome metrics) and qualitative (interview focus groups, observation) and understanding their limitations. At higher levels, this extends to **intersectional analysis across multiple protected characteristics, triangulation across data sources, trend-spotting over time, and benchmarking against external comparators**. Data is used to diagnose, to design, to evaluate, and to make the case for OD investment.

LEVEL	DESCRIPTOR	RATING
Foundation	Understands the importance of data in OD and can collect basic information through surveys, interviews, or observation. Reviews data at face value: identifies obvious patterns and themes. Reports findings clearly but may not yet interrogate data quality, source bias, or the limitations of a single data point. Aware that evidence should drive intervention design but does not always achieve this in practice.	<input type="radio"/>
Developing	Collects and analyses data across at least two modalities: quantitative survey results and qualitative focus group findings, and begins to triangulate between them. Starts to disaggregate data by protected characteristic (e.g. gender, ethnicity) to identify differential experiences. Understands the difference between correlation and causation. Uses evidence to inform intervention recommendations and can defend those recommendations to stakeholders.	<input type="radio"/>
Proficient	Applies rigorous, multi-source evaluation methodology. Triangulates across quantitative data, qualitative evidence, and direct observation as standard practice . Disaggregates data intersectionally: analysing the experience of staff across multiple protected characteristics simultaneously (e.g. the progression rates of disabled women of colour) to surface compounded disadvantage that single-characteristic analysis obscures. Tracks trends over time and identifies early signals of emerging issues before they become crises. Designs evaluation frameworks at the outset of OD programmes, not retrospectively.	<input type="radio"/>
Expert	Operates at the frontier of evidence-informed OD practice. Benchmarks organisational data against sector comparators and national datasets to contextualise findings and set ambitious but credible improvement targets. Applies sophisticated intersectional analysis as standard: understanding that aggregate data masks significant variation in the experience of different groups. Spots and names longitudinal trends that others miss , using them to inform strategic OD priorities. Coaches other practitioners in evaluation design, data literacy, and the ethical use of workforce data . Contributes to sector-level data standards and benchmarking initiatives. Challenges the organisation to publish its data transparently.	<input type="radio"/>

EVIDENCE AND REFLECTION: WHAT TELLS YOU THIS IS YOUR LEVEL? WHAT WOULD DEVELOPMENT LOOK LIKE?

Change Leadership and Stakeholder Influence

OD practitioners rarely hold formal authority. Their influence is relational, intellectual, and positional. Effective change leadership requires the ability to build coalitions, manage resistance, navigate organisational politics, and sustain momentum. This draws on **Kotter's Eight-Step Model, ADKAR, Bridges' Transition Model (distinguishing change from transition), and Prosci's change management frameworks**, alongside political astuteness and the ability to work credibly across hierarchy and organisational boundary.

LEVEL	DESCRIPTOR	RATING
Foundation	Understands the key stages of change, including Bridges' distinction between change (the external event) and transition (the internal psychological process). Aware of common change models including Kotter and ADKAR. Can support change communications and engagement activities. Beginning to identify key stakeholders and understand their positions. May struggle to influence upward or to challenge resistance constructively.	<input type="radio"/>
Developing	Applies change frameworks (Kotter, ADKAR, Prosci) to real change programmes and can explain their relevance to stakeholders. Conducts basic stakeholder mapping: identifying levels of support, interest, and influence. Manages straightforward resistance by listening, addressing concerns, and building understanding. Communicates about change in ways that are honest, clear, and appropriately paced for different audiences.	<input type="radio"/>
Proficient	Leads complex, multi-stakeholder change initiatives with confidence. Uses stakeholder mapping and political analysis to understand the landscape and identify leverage points. Applies Bridges' transition model to help individuals and teams navigate the emotional and psychological dimensions of change, not just the structural ones. Influences upward with evidence, courage, and credibility. Maintains sponsor engagement through the harder middle phases of change when momentum typically dips.	<input type="radio"/>
Expert	Provides strategic change leadership at organisational level and develops the change capability of leaders, managers, and other OD practitioners . Coaches senior leaders in the behaviours that make change stick. Embeds change literacy across the organisation: leaders understand change as a systemic process, managers are equipped to support their teams through transition, and OD thinking is built into how the organisation plans and governs change. Recognised internally and externally for the quality of change leadership thinking.	<input type="radio"/>

EVIDENCE AND REFLECTION: WHAT TELLS YOU THIS IS YOUR LEVEL? WHAT WOULD DEVELOPMENT LOOK LIKE?

Practitioner Self-Awareness and Ethics

The OD practitioner's most important instrument is themselves. Self-awareness (values, assumptions, triggers, biases, and the impact of your presence on a system) is foundational to ethical and effective practice. This draws on **Schein's use of self in process consultation, Hawkins and Smith's reflective practice framework, and the CIPD's core behaviours of ethical practice and valuing people**. At the highest levels, the practitioner actively models OD values: humanity, democracy, inquiry, and continuous learning. They help others internalise them as a way of being at work.

LEVEL	DESCRIPTOR	RATING
Foundation	Aware of the concept of use of self in OD and understands that their own assumptions and reactions affect how they work with others. Engages in some form of reflective practice (journaling, supervision, or peer reflection) though not yet systematically. Aware of their own values and how they differ from those of the organisations they work with. Beginning to recognise when personal triggers or biases are affecting their practice.	<input type="radio"/>
Developing	Engages in regular reflective practice and uses it to improve their work. Seeks and acts on feedback from clients, peers, and supervisors. Aware of their cultural positioning and how it shapes their perspective. Manages their own emotional responses in challenging situations with increasing skill. Names and works with ethical tensions in their practice: conflicts of interest, confidentiality dilemmas, and situations where organisational and individual interests diverge.	<input type="radio"/>
Proficient	Demonstrates mature self-awareness that actively informs and improves practice. Uses supervision, peer consultation, or action learning as a regular discipline rather than an occasional resource. Navigates ethical complexity with confidence, including working with power, privilege, and positionality in the client system. Maintains clear values-based practice even under pressure to compromise. Actively seeks challenge and disconfirmation of their existing assumptions.	<input type="radio"/>
Expert	Exemplifies OD values in practice and actively develops the self-awareness and ethical maturity of other practitioners. Creates reflective practice cultures: supervision structures, peer consultation groups, action learning communities, that sustain practitioner development over time. Coaches others to use themselves as instruments of OD: to notice what they are experiencing in a system, to name it with care, and to use it as data. Challenges organisational norms inconsistent with OD values, doing so with courage, skill, and humanity. Recognised as a practitioner whose integrity and self-knowledge set a standard that others aspire to.	<input type="radio"/>

EVIDENCE AND REFLECTION: WHAT TELLS YOU THIS IS YOUR LEVEL? WHAT WOULD DEVELOPMENT LOOK LIKE?

— SUMMARY

Your OD Practitioner Profile

COMPETENCY AREA	YOUR LEVEL	KEY DEVELOPMENT PRIORITY
1. OD Theory and Knowledge Base	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
2. Diagnosis and Systems Thinking	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
3. Intervention Design and Delivery	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
4. Facilitation and Group Process	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
5. Consultancy and Contracting	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
6. Data, Evidence and Evaluation	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
7. Change Leadership and Stakeholder Influence	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
8. Practitioner Self-Awareness and Ethics	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	

OVERALL REFLECTIONS: WHAT PATTERNS DO YOU NOTICE? WHERE ARE YOUR AREAS OF STRENGTH AND PRIORITY DEVELOPMENT?

MY TOP THREE DEVELOPMENT PRIORITIES FOR THE NEXT 12 MONTHS

WHO WILL I SHARE THIS WITH / WHAT SUPPORT DO I NEED?

REVIEW DATE

Want support with your OD development?

Avant People works with OD practitioners and people functions on mentoring, supervision, and bespoke development. If you want to talk through your results or think about what development could look like for you, get in touch at avantpeople.co.uk.