Successful Delivery Skills

Skills Framework – Assessment Guide

Contents

Introduction and general approach

This guide has been developed to give you information and instructions for carrying out a skills assessment using the Successful Delivery Skills Framework and Skills Passport. It includes guidelines to help individuals recognise when and how to move from one proficiency level to another. It is written from the point of view of the individual but should also be read by your manager prior to confirming your assessment.

The Skills Framework identifies the skills required for Project management, Programme management and procurement needed by an individual within these professional disciplines to carry out their work. Further information on generic (soft) skills that underpin these is found at the beginning of the Skills Framework document.

In time, the Skills Passport will support a variety of assessment methods. The method currently being used in the Passport is self-assessment and manager-assessment.
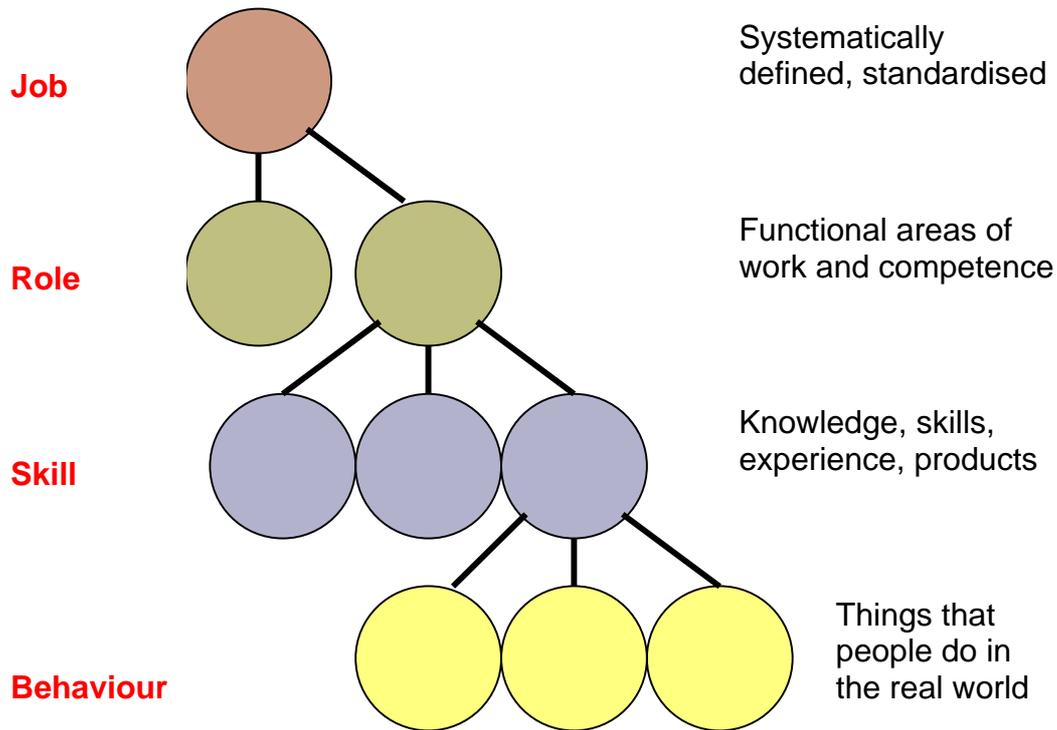
Responsibility for assessment lies with the individual and their manager. The assessment process is ongoing. Increases to your skills level due to additional training, qualification or experience need to be confirmed by your manager and recorded on your Skills Passport but please remember your proficiency levels can decrease through lack of use as well as increase.

It is important to note the Skills Framework and Passport are not performance measurement tools. They are measures of competence. While competence (ability) is part of performance (achievement), it is not the only factor

The assessment process is ongoing.

Proficiency levels and skills have been set and agreed by the Successful Delivery Skills User Forum that is made up of representatives from most major departments.

Architecture for Skills Framework

Job — Systematically defined, standardised

Role — Functional areas of work and competence

Skill — Knowledge, skills, experience, products

Behaviour — Things that people do in the real world

It is important to emphasise that there is no common agreement on job titles, grades etc. across departments. Therefore 'Role' is the area that remains static across departments. Each department will create jobs that consist of a number of roles – or areas of competence.

Following this architecture for the Skills Framework, an individual working as a project manager would match their position as follows:

Job   Current job title/role specific to your department.

Role   Project management. This would be one role that makes up a job. Others for example might be or a skill set specific to the job.

Skill   There are 14 skills associated with the project management role. The jobholder would select the total number that are relevant to the current role.

Behaviour   The behaviours are listed in bullet point format within the Skills Framework. These are the 'performance behaviours' or specifically stated requirements for a person performing a particular task (at expert level).

Job: As defined within relevant department.

Role: Project Management**.**

A project is a unique set of co-ordinated activities, with definite starting and finishing points, undertaken by an individual or team to meet specific objectives within defined time, cost and performance parameters as specified in the business case. It should have the following characteristics:

- a finite and defined lifespan
- defined and measurable business products (i.e. deliverables and/or outputs to meet specific business objectives)
- a corresponding set of activities to achieve the business products
- a defined amount of resources
- an organisation structure, with defined responsibilities, to manage the project.

Projects should contribute to business objectives; typically their funding is identified as part of business planning. They may be part of an overall programme of business change.

Project management is much more than the tasks carried out by a project manager. Project management is a combination of the roles and responsibilities of individuals assigned to the project, the organisational structure that sets out clear reporting arrangements and the set of processes to deliver the required outcome. It ensures that everyone involved knows what is expected of them and helps to keep cost, time and risk under control.

Skill (1 OF 14): 1. Business case management:

Behaviour: As an *expert* you will be able to:

- verify that objectives reflect the needs of the sponsor and stakeholders
- define and present project objectives from various inputs and sources of information
- review potential expenditure and agree budget
- review and prioritise perceived risks and opportunities
- consider options and decide on recommended approach
- analyse and prepare arguments for justifying the business case for the sponsor and other key stakeholders to commit to undertaking the project
- prepare all necessary supporting documentation
- prepare and present the business case in a format which is likely to gain support of the sponsor and other key stakeholders
- provide strategy for value management that improves business decision-making, increases effectiveness and enhances competitiveness of the project.

How do I carry out an assessment?

You will complete the assessment process in four stages. These are:

1. Review skills
2. Assess yourself
3. Review assessment with your manager
4. Summarise data

1. Review skills

You should first read the skill definition and proficiency level to assess your capability. This will give you a general description of the skill and the behavioural anchors or tasks that an *expert* in this skill would perform (unless the skill is specifically written at another level).

Below you can see an example of a skill, which includes its description and behavioural anchors (or tasks, actions or knowledge an expert in the skill would be able to perform).

Quality management

Quality management is concerned with the commitment to delivery and control of quality at all stages of the project's implementation. It requires responsibilities to be defined and delegated, and monitoring and reporting systems to be in place.

As an *expert* you will have underpinning knowledge and understanding of:
- principles of and processes for quality assurance and control
- quality assurance approval authorities
- communication and presentation techniques.

As an *expert* you will be able to:
- verify quality assurance procedures are appropriate and sufficient to meet requirements
- ensure a commitment to quality assurance procedures is obtained from those responsible for applying them
- ensure data is gathered and recorded in accordance with agreed quality assurance procedures
- accurately assess outcomes and performance against specified or expected targets or milestones
- identify areas of non-conformance promptly and report them clearly to those who need to know
- initiate effective remedial action to correct the causes of non-conformance and limit their effect produce and maintain records in line with requirements needed for quality audits.

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2. Assess yourself

Once you have reviewed the skills and proficiency level, begin your self-assessment by selecting the proficiency level for each skill that best describes your current knowledge and performance. Detailed instructions on how to input this data into the Skills Passport can be found in the Passport User Guide.

In the example above, the skill of Quality management has seven behavioural anchors listed at an "expert" level. When you review this list, the following general advice applies.

Awareness: You will recognise approximately 25 per cent of these behaviours, perhaps at a lower level than that listed, or will be contributing to these processes. You may recognise other additional behaviours, but in your current role will not be applying these behaviours on a regular basis.
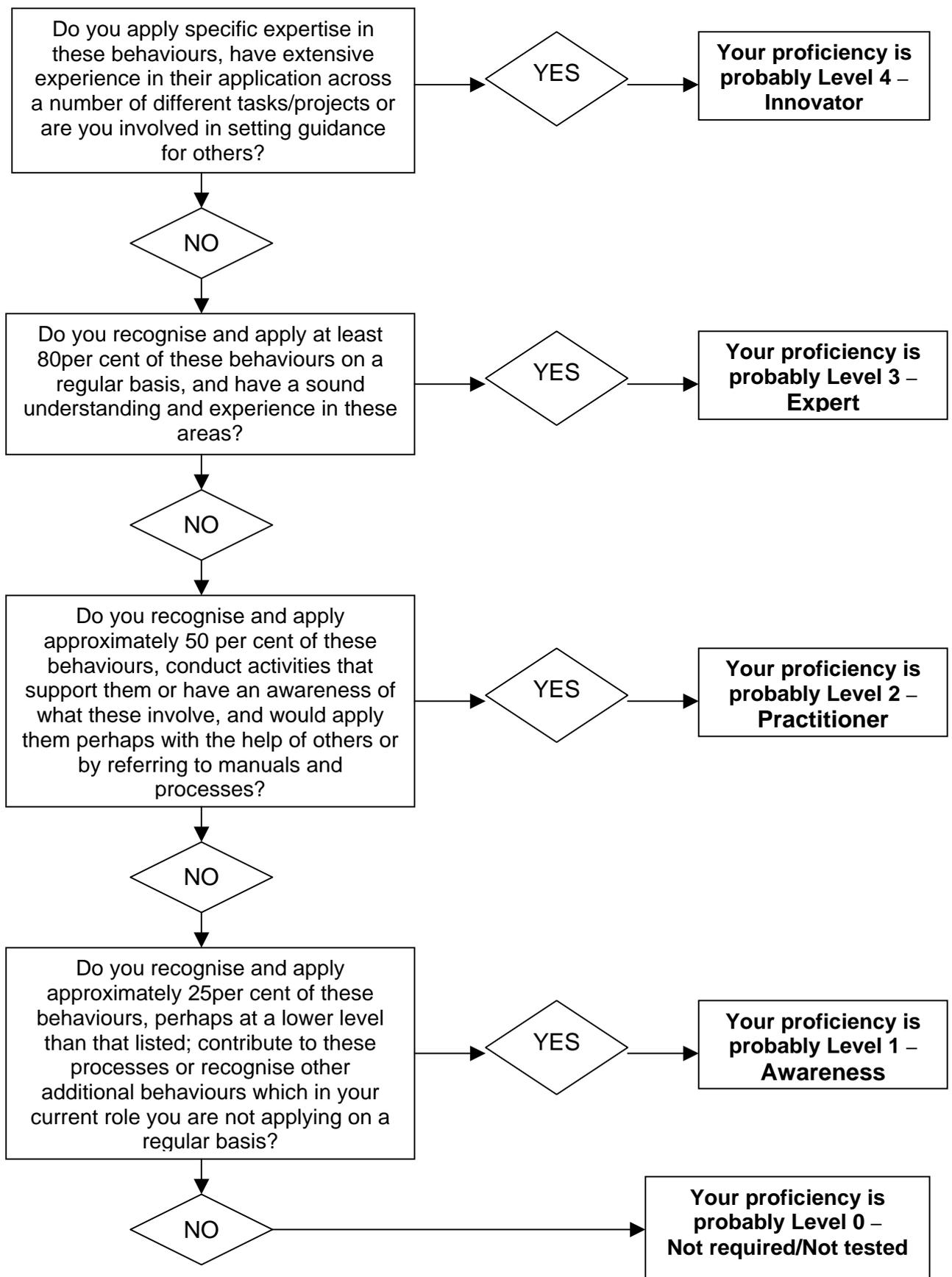
Practitioner: You will recognise and apply approximately 50 per cent of behaviours listed, or conduct activities that support them. You will have an awareness of what these involve, and would apply them perhaps with the help of others or by referring to manuals and processes.

Expert: You will recognise and apply at least 80 per cent of these behaviours on a regular basis, and have a sound understanding and experience in these areas.

Innovator: You will be applying specific expertise in these behaviours, have extensive experience in their application across a number of different tasks or projects and be involved in setting guidance for others.

You may prefer to use the self-assessment flow diagram below:

Self-assessment flow diagram

Do you apply specific expertise in these behaviours, have extensive experience in their application across a number of different tasks/projects or are you involved in setting guidance for others?

→ **YES** → **Your proficiency is probably Level 4 – Innovator**

↓ **NO**

Do you recognise and apply at least 80per cent of these behaviours on a regular basis, and have a sound understanding and experience in these areas?

→ **YES** → **Your proficiency is probably Level 3 – Expert**

↓ **NO**

Do you recognise and apply approximately 50 per cent of these behaviours, conduct activities that support them or have an awareness of what these involve, and would apply them perhaps with the help of others or by referring to manuals and processes?

→ **YES** → **Your proficiency is probably Level 2 – Practitioner**

↓ **NO**

Do you recognise and apply approximately 25per cent of these behaviours, perhaps at a lower level than that listed; contribute to these processes or recognise other additional behaviours which in your current role you are not applying on a regular basis?

→ **YES** → **Your proficiency is probably Level 1 – Awareness**

↓ **NO** → **Your proficiency is probably Level 0 – Not required/Not tested**

3. Review assessment with your manager

Once you have completed the self-assessment, a meeting should be scheduled with your manager.

The skill assessment helps you to organise your ideas and to review your knowledge and experience. However, this process needs input from your manager to establish a consensus where you both can agree on the individual's skill levels.

Your manager's view of your skills level may differ from your own self-rating, and for this reason the meeting is scheduled. Once agreement has been reached, you will find detailed instructions on how to input this data into the Skills Passport in the Skills Passport User Guide.

4. Summarise data

Once you and your manager have agreed on your current proficiency levels for all skills you should undertake a final review of this data in your Skills Passport to update your profile. This will represent your current proficiency level. If you can identify skills gaps you will be able to focus your development needs on these areas, as this will have the biggest impact on your current and short-term business needs.

Proficiency levels for assessment

Each skill set and competence is assessed at the following levels:

Level 0 Not required/not tested

This reflects where a skill listed in the framework is not relevant to an individual's current job structure.

Level 1 Awareness

Describes someone who is dependant on others for direction, is learning the skill and when facing something new or unusual has to refer to procedures, manuals, other team members etc., for guidance. You may only ever need awareness of particular skills, or may be gaining experience in the skill.

It is important to note that attending training does not automatically mean that your proficiency level will increase. Once you have received training you will need to reinforce what you have learnt by using the skills.

You may stay at this level for some time, training and other development activities will help, but it is experience of applying new skills that will develop your proficiency level. As people learn at different rates, there is no set time limit for your level to increase.

Level 2 Practitioner

Describes someone who can cope with standard problems/common situations, is competent at day-to-day application of the skill, and is able to present concepts, information and solutions.

At this level you can deal with most standard problems and will only need to refer to an expert for non-standard issues and problems. You will still be using a variety of development activities to increase your experience and proficiency level e.g. reading manuals, white papers etc. and on the job training. You will still go on training courses and these will probably be at an advanced level.

You will probably stay at this level for some time.

Level 3 Expert

Describes someone who can cope with unusual/non-standard problems and issues, is aware of alternative options and approaches to situations, can guide or advise others in this skill and is able to look ahead and anticipate.

Training alone will not take you to an expert level. It is experience in the job, as well as using the skill and other development activities that will develop your proficiency level.

Not only are you capable but confident in applying the skill in ordinary and unusual situations. Others will seek you out for advice and you may be involved in coaching/mentoring activities.

Level 4 Innovator

Describes someone who is seen as setting an example to others, is a recognised expert and visionary in the field, provides broad guidance to others in the application of their skills to related areas, is a 'thought leader' in their field (shows advanced thinking, develops innovative approaches) and stretches others' thinking and challenges them to excel.

Frequently asked questions

How long will it take to assess my skills?

The time it takes to complete the assessment will depend on your job and your experience of both the job and the skills assessment process.

From feedback we have received to date the average assessment will require 60-90 minutes, but does not need to be completed in one attempt. Take the time to read each skill description in full before you rate yourself. The initial assessment may seem a lengthy process, but once completed will only require minor – but regular – updating.

What happens if I change my job?

When you change jobs, you will be able to take your Skills Passport with you. If you change into a job outside of the project/programme management or procurement scope this information will decrease in relevance and value.

My manager is not in the same job – how can he/she assess my skills?

If your line manager is not best placed to carry out your assessment, agree on someone who is. This could be a peer, a mentor, a colleague or functional manager. This should be a person both you and your line manager agree on.

Once your skills have been assessed arrange a meeting with your manager to review your skill profile and discuss development plans.

What if I disagree with my manager's assessment?

In the event that you cannot agree your assessment with your manager, you may involve a third party – generally someone who is seen as an expert within the professional discipline in which you are being assessed.

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