Professional Planning Forum’s Skills Framework
&
Professional Accreditation
Assessment Guide
March 2013 V0.3
Checklist

- Detailed levels of ability document / folder
- Assessment forms
Purpose of the Assessments

- To understand current skill levels for each individual
- To use the assessment to compare current skill levels with those required for the role, identify and prioritise needs and help shape development plans in line with organisational goals
- To provide feedback / recommendations to:
  - Amend competencies assigned to the roles and objectives of the organisation
How to prepare

- Ensure the individual being assessed has had the appropriate time to prepare for the assessment and have made use of the self assessment mechanism (excel or online) to record their scores and evidence.
- If this is not given the appropriate time, the calibration session becomes much more difficult.
How to prepare

- Use the assessment form to review which competencies are applicable for that role and then ensure the individuals sponsor (line manager or external) completes the following:
  - Read the detailed levels of ability, noting down which skill level they believe the individual is currently at
  - Consider what they have observed the individual doing, in what context and how this fits with the competency definition and how this relates to the current role the individual is in
  - Note down any particular examples or evidence to support the level of ability selected in readiness for the discussion
  - Please note, ALL of a level should be evidenced for it to be assigned. Where the individual partially meets a level of ability, note down the elements they need to develop
How to prepare

■ Consider that the competency levels will cover all roles within the planning function and therefore the skill levels required for the role you are reviewing may be higher than for some and lower than for others (e.g. negotiation and influencing skills for an MI co-ordinator will not need to be as advanced as for the Planning Manager)

■ The competencies have been rigorously checked and should be fit for purpose. Due to the varying nature of our industry, they have been created with a generic approach, so common sense may need to be applied to reflect individual organisational structures, processes and goals
How to conduct the assessment

- Ensure the individual has prepared – if they haven’t you should look to rearrange the session.
- Take each competency and ask the individual to advise what level of ability they believe they are at and to summarise their evidence to support this.
- Check if this matched with the sponsor’s own observations. If it does, record both skill levels and the relevant assessment mechanism.
How to conduct the assessment

- If the ratings do not match, discuss the varying view points, aiming to achieve a consensus. Ask probing questions to understand the differing viewpoints and be prepared to manage the expectation of the individual as to what stretch is required to achieve a skill level. (ensure that evidence of skills can be related to work, noting that the skill may have been used in a recent, previous role within the last 18 – 24 months)
How to conduct the assessment

- If evidence is being provided for a skill level used in a previous role, providing sufficient examples are provided, you should take the individual’s self assessment on good faith. The expectation is that you or the sponsor should be able to observe this skill before the next formal assessment to validate the self assessment.

- Where ratings did not originally match, record your and their original skill level of the mechanism, along with the final level agreed. If a resolution cannot be easily be achieved, move onto the next competency and if necessary, reserve a decision until after moderation.
Remember…

- This is often the first time an individual has been assessed for a role: It is fine for them to be at a lower skill level then plotted for the role – this can be worked on via a development plan.

- Keep the discussion moving – ensure you don’t spend too long on the first few competencies and run out of time to discuss the later competencies in sufficient detail.

- The assessment needs to be an **objective** review of current skill levels.

- Assigning a skill level which does not accurately reflect current skills will lead to a development plan being created which does not focus on increasing skill where it is most relevant.
Questions and Comments