



Protected Area Competence Assessment Application (PACAA)

Introduction and user guide

The application uses the 300 competences in the [IUCN WCPA Global Register of Competences for Protected Area Practitioners](#) to generate customised job descriptions, course curricula and capacity needs assessments and reports for protected area personnel. Please consult this while learning to use the PACAA

This application helps you to sort and filter the 13 Work Categories, 4 levels and 300 competences of the competence register to

- Create customised profiles/position descriptions for individuals or for particular jobs (e.g. ranger, senior biologist, PA Director).
- Create course curricula and learning objectives
- Create competence assessment questionnaires based on the profiles to be completed by individuals and/or managers
- Analyse the results of the questionnaires for individuals of groups in order to create detailed job descriptions and training course curricula and to identify strengths, weaknesses and capacity needs.

The application is designed to be quite simple and robust, to be undemanding on computing power and to work on older model computers and operating systems.

The offline option means that it can be used almost anywhere with a copy of MS Excel.

Once you are used to the full screen version it is quite easy to use on mobile phones, but the graphics are not specially designed for mobiles. You will need to download the MS Excel App to use the offline version.

This application has been produced with support of the 11th European Development Fund through the Biodiversity and Protected Areas Management (BIOPAMA) Programme. The contents of this publication are the sole responsibility of IUCN and can in no way be taken to reflect the views of the European Union nor of the Organisation of African, Caribbean and Pacific States



Production of the app was also supported by



Application concept developed and designed by Owen Appleton and Mike Appleton

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Website by [eastpoint](#)

Using the App Step by Step

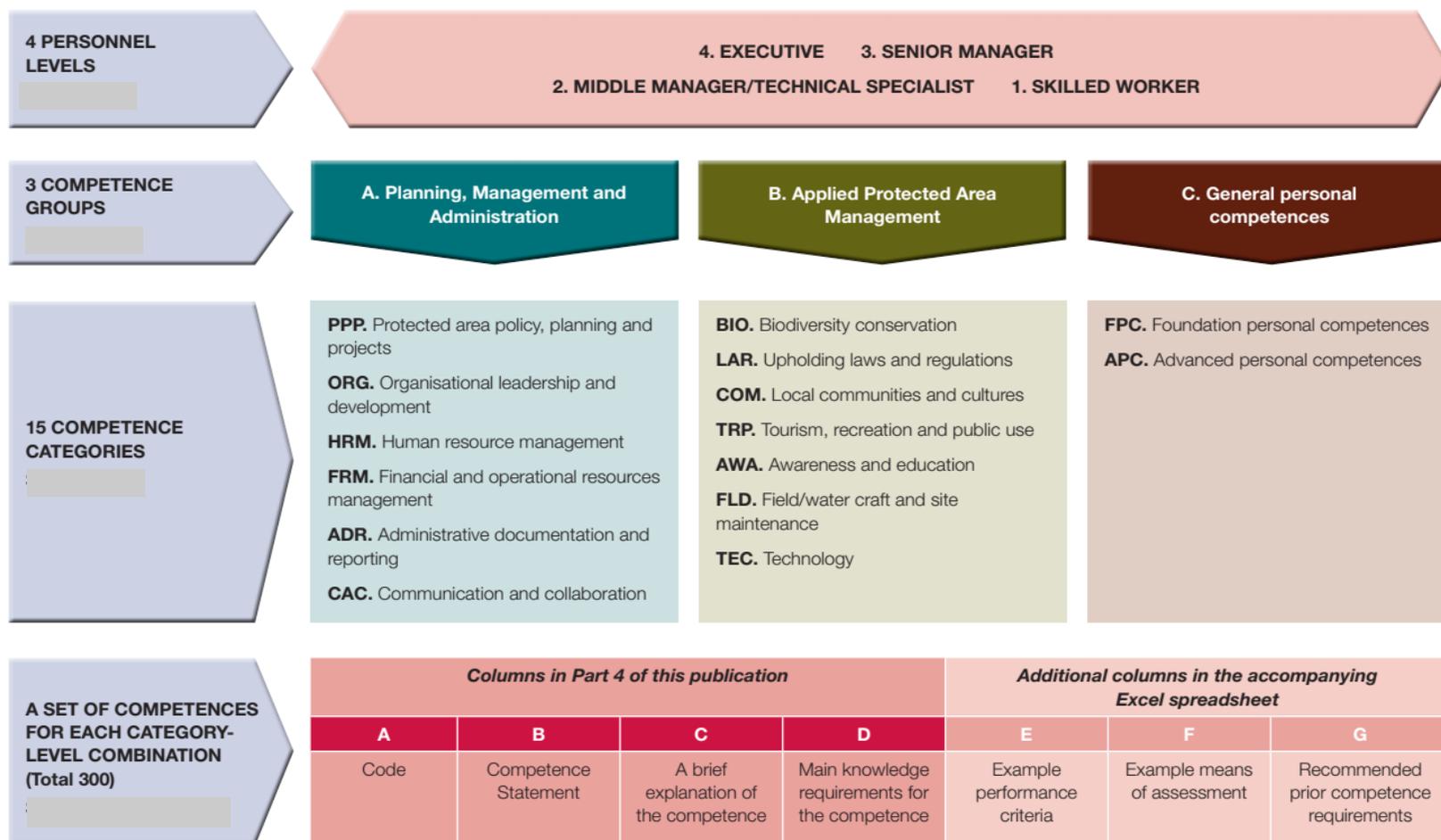
1.	Overview. How the App works	4
2.	Home Page.....	7
3.	Registration.....	8
4.	My Profile	9
5.	Assessment routes summary.....	9
6.	Assessment Groups	10
7.	Add new Assessment Group.....	11
8.	Invite/Manage Assessors.....	12
9.	Job Profiles.....	12
10.	Add job profile	13
11.	Choosing job levels	14
12.	Creating a job profile	15
13.	Conducting Assessments. An overview	16
14.	Tips for conducting assessments.....	17
15.	Starting an assessment.....	19
16.	Assessee Details.....	19
17.	Online Assessment	20
18.	Offline Assessment	21
19.	The Excel Form.....	22
20.	Assessments using the Excel Form	23
21.	Uploading the Excel Form.....	24
22.	Analysis and results	25
	Tab 1 Results overview	25
	Tab 2 Competence overviews	27

Tab 3 Full results.....	28
23. Analysing Multiple Results.....	29
24. View Combined Results	30
25. Download All Data	31
26. Upgrade	31

1. Overview. How the App works

This application uses the 300 competences in the [IUCN WCPA Global Register of Competences for Protected Area Practitioners](#) (the Competence Register) to generate customised job descriptions, course curricula and capacity needs assessments and reports for protected area personnel. Please consult this while learning to use the PACAA

The competence register organises the competences into 4 job levels and 13 categories as shown in the table below.



Each of the 300 competences in the register contains the three main parts as shown in the example below. The full competence register contains further details.

Code	Competence. The individual should be able to:	Details, scope and variations. A brief explanation of the competence.
BIO 2.4	<p align="center">Propose justified management measures for conservation of species.</p>	<ul style="list-style-type: none"> • Using survey, monitoring and research results to prepare evidence-based recommendations for conservation of important species. • Preparing detailed management recommendations and prescriptions for inclusion in management plans, project proposals, etc. • Ensuring that recommendations are science- and evidence-based and/or based on established traditional knowledge and experience. • Recommended measures may vary greatly according to local conditions and need, but should be clearly justified and make use of accepted best practice.

The app helps you sort which of the 300 competences are relevant to any job and to assess the current competence of individuals for each.

In simple terms this is how it works

1. Based on information you give it, it creates a customised **JOB PROFILE**, which identifies the main categories and levels of work relevant to a job type (e.g. head ranger, park director, biological surveyor) or to a specific individual.

You can use job profiles to create job descriptions, decide the staffing structure of a protected area or identify the broad topics and learning outcomes for a training course or programme of learning.

2. It uses the job profile to select which of the 300 **COMPETENCES** likely to be most relevant to the job or person.

You can use this list of competences to create detailed job descriptions and to identify specific elements of a training course or programme of learning.

3. It enables a competence **ASSESSMENT** of each individual who matches the job profile. This can be done online or offline.

You can use the assessments to review the specific strengths and weaknesses of anyone working as a protected area practitioner.

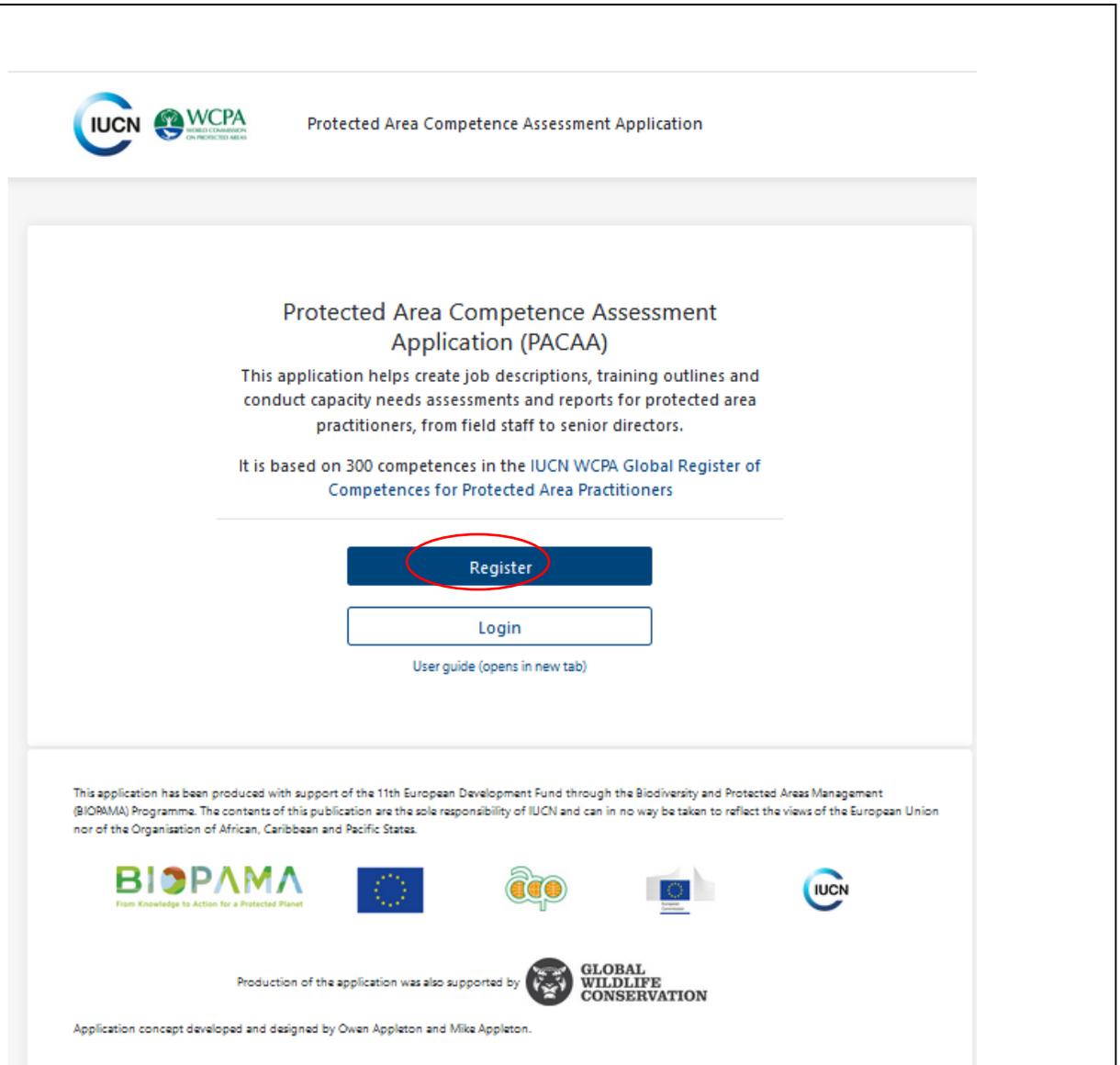
4. It presents **RESULTS** of the assessments as graphs and tables, both for individuals and for all those with the same job profile (e.g. all rangers).

You can use the results to analyse areas of good competence and training needs for every individual assessed and for entire teams. This can help identify and prioritise training needs for individuals and teams, identify individuals with high levels of skills who can act as coaches and mentors, identify individuals who need extra help or support, and also monitor overall capacity over time. You can also use the results for your own analyses.

The following sections provide a step-by-step guide on how to use the App.

2. Home Page

This invites users to register or log in.
You will need to use an email address and
create a password.

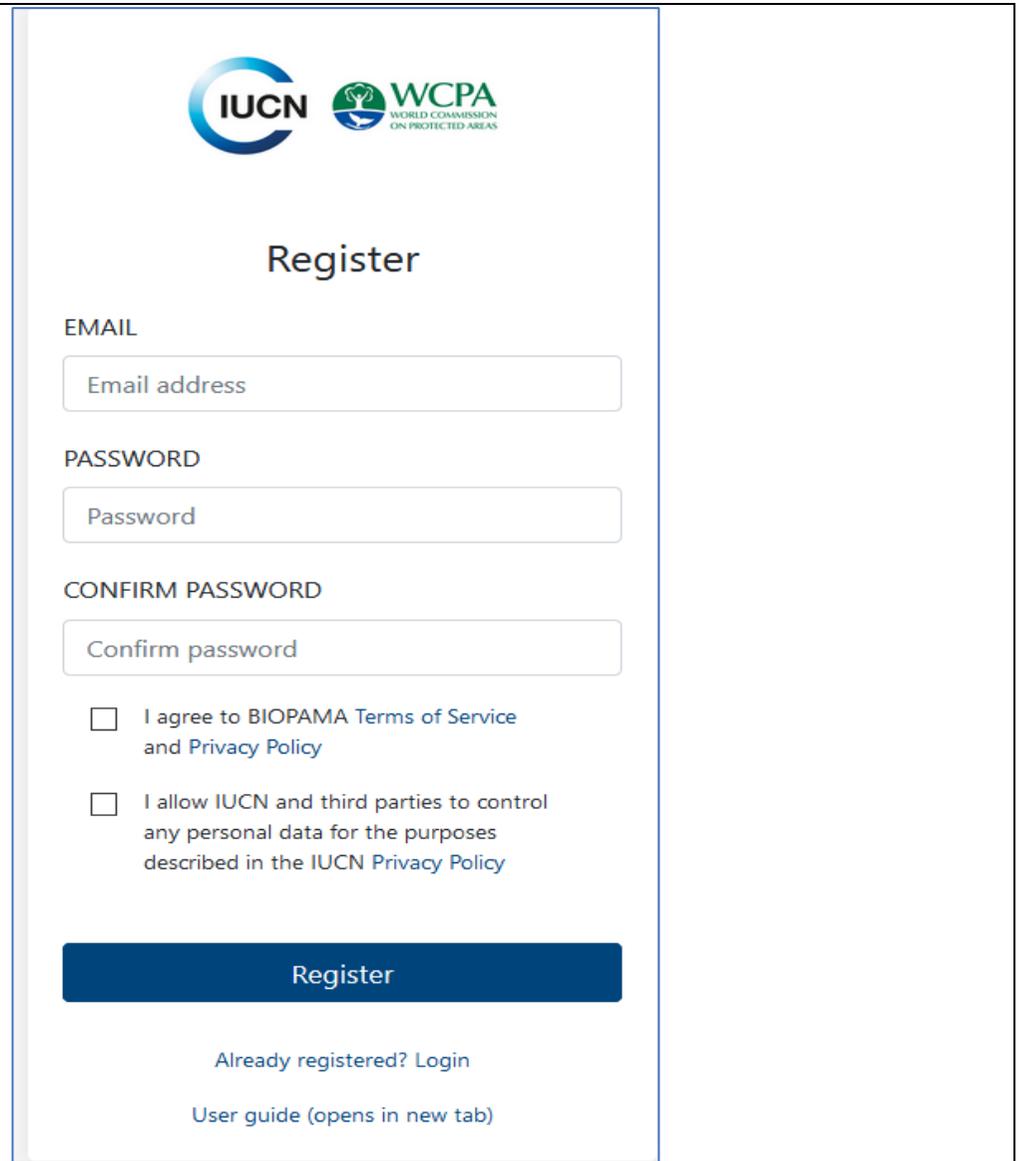


The screenshot shows the home page of the Protected Area Competence Assessment Application (PACAA). At the top, there are logos for IUCN and WCPA (World Commission on Protected Areas), followed by the text "Protected Area Competence Assessment Application". The main content area features the title "Protected Area Competence Assessment Application (PACAA)" and a description: "This application helps create job descriptions, training outlines and conduct capacity needs assessments and reports for protected area practitioners, from field staff to senior directors." Below this, it states "It is based on 300 competences in the IUCN WCPA Global Register of Competences for Protected Area Practitioners". Two buttons are visible: a dark blue "Register" button (circled in red) and a white "Login" button. Below the buttons is a link for "User guide (opens in new tab)". At the bottom, there is a disclaimer: "This application has been produced with support of the 11th European Development Fund through the Biodiversity and Protected Areas Management (BIOPAMA) Programme. The contents of this publication are the sole responsibility of IUCN and can in no way be taken to reflect the views of the European Union nor of the Organisation of African, Caribbean and Pacific States." Logos for BIOPAMA, the European Union, and IUCN are displayed. Below these, it says "Production of the application was also supported by" followed by the logo for GLOBAL WILDLIFE CONSERVATION. At the very bottom, it states "Application concept developed and designed by Owen Appleton and Mike Appleton."

3. Registration

You will need to use an email address and create a password and agree to the terms and conditions.

A message will then be sent to your email account inviting you to log in.



The screenshot shows a registration form for IUCN and WCPA. At the top, the IUCN logo (a blue circle with 'IUCN' in white) and the WCPA logo (a green globe with 'WCPA' and 'WORLD COMMISSION ON PROTECTED AREAS' in green) are displayed. Below the logos, the word 'Register' is centered in a large, dark blue font. The form consists of three input fields: 'EMAIL' with a sub-label 'Email address', 'PASSWORD' with a sub-label 'Password', and 'CONFIRM PASSWORD' with a sub-label 'Confirm password'. Below these fields are two checkboxes with associated text: the first checkbox is for 'I agree to BIOPAMA Terms of Service and Privacy Policy', and the second is for 'I allow IUCN and third parties to control any personal data for the purposes described in the IUCN Privacy Policy'. At the bottom of the form is a prominent dark blue button labeled 'Register'. Below the button, there are two links: 'Already registered? Login' and 'User guide (opens in new tab)'.

4. My Profile

Once registered, enter the name you wish to be known by on the system. You now have an important choice.

1. You can opt to register as an Assessor.

This gives you access to all the functions of the app. You can create assessment groups, conduct and analyse multiple assessments online and offline, and even invite other assessors to work with you

2. You can opt for a single online individual competence assessment.

This simpler option enables you to use the app for one online assessment and to save the results, but it will not store anything on the system. Choose this option if you want if you want to just assess your own competence or test the app.

If you wish you can then upgrade your status to Assessor

The screenshot shows the 'My profile' page of the Protected Area Competence Assessment Application. At the top left are the IUCN and WCPA logos. The title is 'Protected Area Competence Assessment Application'. Navigation links include 'My dashboard', 'My profile', 'User guide', and 'Logout'. The 'My profile' section contains two text input fields for 'FIRST NAME' and 'LAST NAME'. Below these are two radio button options: 'I am an assessor for a protected area, organisation or group' and 'I would like to do a one-off self assessment'. The second option is circled in red. A 'Save' button is located at the bottom right.

5. Assessment routes summary

The boxes below summarise the two paths through the app for the 'One Off' or 'Assessor' choices. Whichever option you choose, the app works in generally the same way. The following sections explain the assessor route (which is more complicated), but indicate which elements are also relevant to one-off assessments

One off assessment route summary

Register>Create User Profile> Create and save Job Profile>
Conduct Assessment > Review Results>Print results>Option to
upgrade to Assessor

Assessor route summary

Register > Create User Profile>Create Assessment
Group(s)>Invite other assessors>Create multiple Job Profiles in
Assessment Groups> Conduct multiple individual assessments
using each Job Profile>Review Results>Save results>Download
results

6. Assessment Groups

(Relevant to Assessors only)

The first step for Assessors is to set up an **Assessment Group**, the term given to any site, organisation or other entity in which you are assessing a range of personnel.

An assessment group could be a protected area, an NGO or a parks agency or a department of any of those. Or it could be all the protected area head rangers in a region. All assessments are organised by assessment group on the Dashboard page. By setting up an Assessment Group, you automatically become the 'Lead Assessor' for it. You can add and invite other assessors if you wish, but you have control of the group.

Once you have created an Assessment Group, click 'View' in the dashboard. You can then, if you wish, edit or update the information about the group by clicking 'Edit'.

Assessment groups

Create an assessment group (protected area, organisation or other group). You will be lead assessor of the group and can choose to invite other assessors. Access to existing data is by invitation only.

[Add new assessment group](#)

[User guide \(opens in new tab\)](#) [View the Competence Register](#)

Title	Access Type	Actions
Pine Trees National Park 2020 V1	Lead assessor	View Delete

[View results of assessment groups](#)

7. Add new Assessment Group

(Relevant to Assessors only)

When you select the 'Add New Assessment Group' button, you are asked to provide some details of the group and to save this information.

The Assessment Group will then be added to your dashboard. You can add and manage multiple Assessment Groups.

Lead Assessors may delete assessment groups from the dashboard. This will permanently delete all the data and assessments made for that group.

Once you have created an Assessment Group, click 'View' in the dashboard. You can then, if you wish, edit or update the information about the group by clicking 'Edit'.

The screenshot shows the 'Add new assessment group' form in the Protected Area Competence Assessment Application. The form is titled 'Add new assessment group' and is located under the breadcrumb 'My dashboard / Assessment groups / Add new assessment group'. The form fields are as follows:

- NAME OF ASSESSMENT GROUP (PROTECTED AREA, ORGANISATION OR OTHER GROUP):** Text input field containing 'Pine Trees National Park'.
- COUNTRY:** Dropdown menu with 'Select Country'.
- IUCN CATEGORY:** Dropdown menu with 'II'.
- PARENT ORGANISATION (IF RELEVANT):** Text input field containing 'National Protected Areas Agency'.
- LOCATION:** Text input field containing 'Maintown'.
- OTHER INFO:** Text input field containing 'Subdivision of Ministry of Environment'.

Below the form fields, there is a section for 'Personnel numbers' with the instruction 'Enter the personnel numbers in the assessment group.':

- LEVEL 4 - EXECUTIVE:** Text input field containing '2'.
- LEVEL 3 - DIRECTOR/SENIOR MANAGER:** Text input field containing '4'.
- LEVEL 2 - MIDDLE MANAGER/TECHNICIAN:** Text input field containing '6'.
- LEVEL 1 - SKILLED WORKER:** Text input field containing '20'.

At the bottom of the form, there is a 'Save' button and the instruction 'Press 'Save' when complete.'

8. Invite/Manage Assessors

and

9. Job Profiles

Assessors can also invite others to work with you on an Assessment Group (but you will remain the Lead Assessor), so that a team can use the App for the same assessments. You will need to enter the email address of invitees and they will need to follow the instructions in the email they receive. They will then have access to the data in the assessment group and work with you on it, but they cannot edit it.

The next step is to generate **Job Profiles** within an Assessment Group. This is where the one-off assessment process starts.

Job Profiles are general job descriptions for individuals or groups of personnel in an Assessment Group. You can see that the dashboard in the example includes profiles for one individual and two positions.

First click on **Create new job profile**

The screenshot shows a dashboard for 'Pine Trees National Park' with an 'Edit' link. A red circle highlights the 'Invite/manage assessors' button. Below this, a section titled 'Creating a job profile' explains that it is used for individuals or positions within an assessment group, using 13 main categories from the Competence Register. A red circle highlights the 'Create new job profile' button. Below this is a table of job profiles:

Job profile name	Type	Actions
A. Eagle	Individual	View
Director	Position	View
Ranger	Position	View

At the bottom of the dashboard, there is a 'Download all data' button.

10. Add job profile

(Relevant to all users)

It is important to take time over profiles, as your choices will influence the competences selected by the App as being relevant to the person or position.

When you click on **Create new job profile'** you are given the choice of creating two types of profile

Individual. Select this if you are profiling and assessing a specific named person. The page will expand to request some information about the individual to be profiled and assessed. Subsequent assessments will be based on the specific profile developed for that person.

Position. Select this if you are profiling a generic job or position within the assessment group that requires similar sets of competences and that may be done by several people (e.g. Ranger, Senior Ranger, Tour Guide, Senior Manager). The page will expand to request some information about the position.

In both cases you will be asked to choose a general job level for the profile. This is important and is explained below.

Add job profile

This helps set up a job profile for an individual within the assessment group or a position (a job done by a sub group of personnel e.g. Ranger, Tour Guide, Senior Manager).

Page 1 of 4

It uses the 13 main categories of the Competence Register to define the main responsibilities associated with the individual or position

Is this profile for an individual or a position?

- Individual (A specific named person)
- Position (A job within the protected area, e.g. ranger, tour guide, section head)

NAME OF THE POSITION

Tourism Officer

NUMBER OF PEOPLE IN THE POSITION

3

WHAT DEPARTMENT THEY ARE IN

Tourism and Awareness

PLACE OF WORK

Park HQ

General job level

Review the descriptions for the four jobs below and select which one corresponds most closely to your/the individual's job.

- Skilled Worker [i](#)
- Middle Manager/Technician [i](#)
- Director/Senior Manager [i](#)
- Executive [i](#)

11. Choosing job levels

(Relevant to all users)

The app uses the **four job levels** from the competence register, as shown in the table below.

You need to select which one is the best fit for the job or person you are profiling. Think carefully and do not rely on the job title alone to decide the level. A ranger in one country may be at Level 1 and in another country may have more leadership and supervisory responsibility and be at Level 2. Select the level that is the best overall fit for the job (not the highest possible level). If in doubt' select a lower rather than a higher level.

The level you assign will determine the initial range of competences associated with the position, but these can be customised later in the process.

Level	Title	Scope of work and responsibility	Examples of positions at the level in the Protected Area Sector
LEVEL 4	EXECUTIVE	<ul style="list-style-type: none"> • Central direction and management of large organisations. • National and regional policy development, spatial and strategic planning. • Cross sectoral coordination. • Direction of complex programmes and plans across a PA system 	<ul style="list-style-type: none"> • Director of national or subnational protected area system. • Ministerial level executive responsible for protected area systems. • Senior national or subnational planner (land use, resource use, development).
LEVEL 3	SENIOR MANAGER	<ul style="list-style-type: none"> • Direction and management of medium sized organisations and departments • Planning and management of projects and programmes within strategic frameworks. • Directing and leading complex and technical programmes 	PA director/deputy, chief park warden, Senior management team member, Head of a large department in the PA
LEVEL 2	MIDDLE MANAGER, TECHNICAL SPECIALIST	<ul style="list-style-type: none"> • Leadership, organisation and supervision of technical sections and teams implementing plans and projects. • Providing technical expertise and completing specific and complex technical assignments (according to technical speciality). 	Senior ranger, section leader, scientific officer, tourism officer, community outreach officer, educational and interpretive officer, administrative officer.
LEVEL 1	SKILLED WORKER	<ul style="list-style-type: none"> • Completing practical field or administrative tasks under regular supervision 	Patrol ranger, tourism ranger, community ranger, field assistant, administrative assistant, accounting assistant/bookkeeper, junior technician.

12. Creating a job profile

(Relevant to all users)

This involves assessing how relevant each of the 13 categories of the competence register is to a position or person.

The next three pages list all 13 categories. Clicking the + next to each one opens a set of 3 or 4 options for describing the job. The options are listed in order of increasing relevance and responsibility.

The app suggests an answer based on the overall job level you defined, but you can change this if needed. Read the options carefully and choose the one which best fits the job overall. If in doubt it is usually better to choose the 'lower level' option, considering the work people regularly do, not what they occasionally do

Choose the first option (not significantly relevant) if the category of work is only occasionally relevant or only a very minor part of the duties associated with the job.

When you have finished a page, click 'Next' to move the next one.

To review your choices click 'Back'. When you are sure the profile is complete, click 'Save'. Take care at this stage, as once confirmed the profile cannot be changed. If you make a mistake you need to start a new profile with a different name.

You will then be taken to the next screen, which starts the assessment process.

Pine Trees National Park 2020 V1: Add job profile

Tourism Officer

Number of people in position: 3

Department: Tourism and Awareness

Place of work: Park HQ

Job Level: Middle Manager/Technician (Level 2)

COMPETENCE GROUP: PLANNING, MANAGEMENT AND ADMINISTRATION

page 2 of 4

Expand each of the Competence Categories below and select one of the five options for each. When complete, click 'Next' or 'Save' to move to the next group of competences.

+ COMPETENCE CATEGORY: PROTECTED AREA POLICY, PLANNING AND PROJECTS (PPP)

- COMPETENCE CATEGORY: ORGANISATIONAL LEADERSHIP AND DEVELOPMENT (ORG)

Establishing and sustaining well governed, managed and led organisations for protected area management.

- The job does not significantly involve taking overall responsibility for leadership and direction of an organisation
- The job involves specific overall responsibilities for leadership, direction and management of a protected area or protected area cluster.
- The job involves overall responsibilities for direction and management in a central organisation responsible for/working across a system of protected areas (national/international)

+ COMPETENCE CATEGORY: HUMAN RESOURCE MANAGEMENT (HRM)

+ COMPETENCE CATEGORY: FINANCIAL AND OPERATIONAL RESOURCES MANAGEMENT (FRM)

13. Conducting Assessments. An overview

Now you are ready to conduct assessments. The App uses the job profile you created to identify the set of competences potentially required for the position. Individuals in the position are assessed for each competence listed on a scale of 0 to 4 as follows.

0 - This competence is not required by the person and is not needed in or relevant to his/her work

1 – This competence is required by the person for is her job. They have very limited ability in it. Extensive training and development are required.

2 - This competence is required by the person for is her job. They have good ability in it. Advanced training and development are required.

3 - This competence is required by the person for is her job. Periodic updating needed only.

4 - This competence is required by the person for is her job. They have excellent ability and could train others in it.

Assessments can be conducted online or offline or even on paper.

Online Assessments can be done directly using the App, either entered by the respondent, or entered by the assessor following discussion with the respondent. This method works best for individuals or very small groups, as the assessments can only be entered one by one.

Offline The offline method is much more flexible and is designed for larger groups and for assessments in areas with no internet connection, or where the assessor cannot be present. The app can generate an Excel competence questionnaire sheet for the job profile you have created. Copies of this can then be loaded onto computers for respondents to complete or distributed by email. Once completed, the Excel sheets can be uploaded into the app for processing.

On paper The Excel sheets can also be printed out so that respondents can complete them by hand; the assessor will then have to transpose the results to an electronic version. This paper-based version works very well for groups in remote areas and for those unfamiliar with using computers.

14. Tips for conducting assessments

(Relevant to all users)

Assessment approach

The assessment can be conducted in a number of ways.

- Self-assessment. The individual assesses her/himself, ideally with guidance from a trained assessor.
- Manager assessment. An immediate supervisor conducts the assessment based on his/her judgement of the individual
- Peer assessment. The individual is assessed by his/her colleagues.
- Upward assessment. A supervisor or manager is assessed by his/her subordinates.
- Negotiated assessment. The individual works with colleagues or with his/her supervisor to complete and agree the assessment.

The recommended method is always to use self-assessment, but if time allows, the negotiated approach can help to verify responses, provided that the responses are always agreed.

Preparing for an assessment

It is recommended that assessors work with managers in the organisation to be assessed to develop the job profiles. The assessment team should then consider 'fine tuning' the assessment sheets, because some of the competences may not be relevant to the entire assessment group. It can be useful to work with the protected area manager and some of the staff to identify any competences that are not relevant the job. For example, a team working in a terrestrial area are unlikely to need the competence *FLD 1.15: Dive using SCUBA equipment*. Competences that are not relevant can be prefilled on the offline Excel version with the response '0' (not relevant), or the relevant row hidden (**do not delete rows**). This can reduce the number of assessments individuals have to complete, thereby saving time and maintaining interest. The cover sheet of the Excel assessments can be adapted to the needs of the organisations with Logos etc.

Individuals normally need between 20 and 60 minutes to complete the assessment, depending on how complex the job profile is. You need to ensure that the assesses are available and that an appropriate space is prepared. They will need somewhere to sit, access to computers or to pens and tables or clipboards for completing assessments on paper.

Assessments can be successfully conducted in groups. This allows all participants to be briefed together, to ask questions and to feel more comfortable alongside their colleagues. Also the assessor can be available to answer questions and provide clarifications while the self-assessments are going on, as respondents may not understand some of the competences.

Conducting the assessment

The process should be carefully explained to respondents. The following should be included in any introduction

- The purpose of the assessment and the overall competence-based approach to training and learning.
- How the assessment works. The competence statements and the assessment scale should be explained and examples of how to complete the assessment provided.
- The importance for respondents to be very honest in their responses, not overestimating or underestimating their competence. If they are in doubt about which band to assess themselves in, they should be advised to select the lower of the two; and
- How the results will be used. Respondents should be assured that the assessment is intended to help identify capacity development needs. It is not a test and that the results should not be used against them.
- Anonymity. Respondents should be reassured that the assessment is anonymous, and they do not need to put their names on their responses. This greatly increases the confidence of respondents to enter accurate assessments.

Respondents should then be given time to complete the assessment without conferring with each other. The assessor may answer questions and provide clarifications, but should never however tell or advise respondents what option to choose and should not give the impression that they are monitoring respondents' answers.

Once everyone has finished, they should be thanked and reminded of how the results will be used and reassured that they are anonymous.

Processing the assessments

If the assessment is completed online, this is automatic. If the assessment is completed offline, the completed excel forms or files should be collected and checked that they are complete. If necessary, respondents can be asked to complete missing assessments. If the assessment is paper based, the assessor needs to transfer the responses to the app via Excel sheets or directly. The assessor will be prompted to provide some details of each respondent including a code.

15. Starting an assessment

(Relevant to all users)

Clicking on 'View Full Profile' lets you view, save and print a summary of the profile you have just created. This can be used as a basic job description for the position or individual.

Now you can conduct the detailed assessment of the current competence of each individual in the Assessment Group, who matches the profile you have created.

First we will follow the **online route**, by clicking on 'Create a new online assessment'

We will look at the offline route later.

Pine Trees National Park: Ranger

Ranger
Number of people in position: 34
Department: Protection
Place of work: Park HQ
Job Level: Skilled Worker (Level 1)

[View full profile](#)

Assessments

The next stage is to conduct more detailed competence self-assessments for each individual in the position. The app has generated a list of competences likely to be relevant to the position profile that has been created.

You can do this online if you have an internet connection.

[Create a new online assessment](#)

Offline assessment

Or you can complete this offline, by saving an Excel document and uploading when complete.

[Download Excel document for offline assessment](#) [Upload offline assessment](#)

No assessments
[Create a new online assessment to get started here.](#)

16. Assessee Details

(Relevant to all users)

The first step is to add some details of the first individual in the group to be assessed. We recommend you do not generally include real names.

Include instead a code. If you wish you may keep a list of names for each code in your own files.

It is not compulsory to add the other details, but can help with overall analysis.

When you are done, click START

Pine Trees National Park
Ranger (Position)

NAME
Ranger 003

GENDER
Female

AGE RANGE
46 - 60

HIGHEST QUALIFICATION
High School

DATE OF ASSESSMENT
01/06/2021

[Start](#)

17. Online Assessment

(Relevant to all users)

Remind yourself of the assessment criteria at the top of the page and refer to the Tips for Conducting Assessments.

Then click the + sign to expand each competence category.

You will then see a list of all competences potentially relevant to the job profile, together with some bullet points explaining them.

Make an assessment for the person (0-4) for each competence using the drop-down lists on the right (you can also move to the next assessment using the Tab key on your computer and enter the assessment using the number keys)

Once a page is complete click 'Save and Continue' at the bottom and move to the next page. You will be reminded if you have missed any assessments.

At the end of the last page of assessments, you can save them and also go back to check the previous pages.

Once you click on 'Assessment complete. Analyse results' you cannot change the assessments.

Each competence requires an assessment as follows.

- 0 – This competence is not required by the person and is not needed in or relevant to his/her work
- 1 – This competence is required by the person for his/her job. He/she has little or no ability in it. Extensive training and development are required.
- 2 - This competence is required by the person for his/her job. He/she has limited ability in it. Advanced training and development are required
- 3 - This competence is required by the person for his/her job. He/she has good ability in it. Periodic updating needed only.
- 4 - This competence is required by the person for his/her job. He/she has excellent ability and could train others in it

Assessors should explain the assessment system carefully to personnel and if necessary be available to assist them and provide clarification. If in doubt (for example between 2 and 3) always choose the lower of the two.
Expand each category and assess each competence.

+ HUMAN RESOURCE MANAGEMENT

- FINANCIAL AND OPERATIONAL RESOURCES MANAGEMENT

FRM 1.1 Collect and present evidence of expenditure and other financial transactions.

- Keeping simple records of transactions (e.g. collecting receipts).
- Managing and accounting for small amounts of cash.
- Providing basic summary reports on expenditure.

Assessment

FRM 1.2 Maintain records of materials, equipment and supplies.

- Following procedures for record-keeping of equipment, supplies, consumables, etc.
- Reporting on requirements for purchase, replacement and maintenance.

Assessment

FRM 2.1 Keep books, accounts and inventory records.

- Entering financial information into a standard bookkeeping system (computerised or manual).
- Maintaining records of assets (infrastructure, equipment and materials).
- Managing payroll processes and documentation.

Assessment

Back

Save

Assessment complete analyse results

18. Offline Assessment

(Relevant to all users)

From the Assessment Group screen you can also enable offline assessments by generating an Excel document.

The Excel document can then be loaded onto computers, distributed by email or even printed out for completion by hand.

This method is designed to enable assessments to take place almost anywhere.

It does take a little time to prepare the Excel version, but in many ways it can be much quicker to complete than the online version.

Click on 'Download Excel Document for offline assessment'.

Pine Trees National Park 2020 V1: Tourism Officer

Tourism Officer
Number of people in position: 3
Department: Tourism and Awareness
Place of work: Park HQ
Job Level: Middle Manager/Technician (Level 2)

[View full profile](#) [View combined results](#)

Assessments

The next stage is to conduct more detailed competence self-assessments for each individual in the position. The app has generated a list of competences likely to be relevant to the position profile that has been created.

You can do this online if you have an internet connection.

[Create a new online assessment](#)

Offline assessment

Or you can complete this offline, by saving an Excel document and uploading when complete.

[Download Excel document for offline assessment](#) [Upload offline assessment](#)

20. Assessments using the Excel Form

(Relevant to all users)

Each tab presents a set of competences relevant to the profile you have created. Assessment is done in the right-hand column using the dropdown list, or more quickly entering the assessment (0,1,2,3,4) and moving to the next assessment using the Tab key on your computer.

Conduct the assessments in the same way as for the online assessments.

When each assessment is complete, move to the next tab at the bottom of the sheet..

When all the assessments are complete, save the Excel document with a logical file name that includes the profile, date and the code for the user.

e.g.

PTNP_TOURISMOFFICER_11_08_2020_THGYT134.xls

Category Code	Competence Statement. The individual should be able to:	Details, scope and variations. A brief explanation of the competence.	INDIVIDUAL/JOB ASSESSMENT Click on the cell and select 0, 1, 2, 3, 4 from drop down list
ADR	ADMINISTRATIVE DOCUMENTATION AND REPORTING	Establishing and implementing procedures for information management, documentation and reporting.	
ADR 1.1	Maintain records of work activities.	<ul style="list-style-type: none"> Maintaining records of activity (e.g. through ranger notebooks, timesheets, work records). Using digital record-keeping systems if required (e.g. GPS, SMART). 	4
ADR 1.2	Prepare basic written reports of work activities.	<ul style="list-style-type: none"> Completing required written reports (using prescribed formats). Generating reports from digital devices (if required). 	1
ADR 2.1	Prepare analytical and technical reports and assessments.	<ul style="list-style-type: none"> Researching and preparing written scientific/technical/research reports, including presentation of information, critical analysis of information and preparation of conclusions and recommendations. 	
ADR 2.2	Prepare formal reports of activities and projects.	<ul style="list-style-type: none"> Collating and preparing detailed, structured periodic reports of protected area activities, using prescribed structures and formats if needed. For example: quarterly reports from a section or work team, reports to project donors, management plan implementation reports, etc. Making active and effective contributions to formal and informal 	

Navigation tabs at the bottom: Job Profile, **PLANNING, MANAGEMENT AND ADMINISTRATION**, APPLIED PROTECTED AREA MANAGEMENT, PERSONAL COMPETENCES

21. Uploading the Excel Form

(Relevant to all users)

Once the offline assessments are done and saved, they can be uploaded into the App for processing by clicking on 'Upload offline assessment'

You will be prompted for a file name for the upload, and then asked to enter the personal details of each respondent.

If all the assessments have not been completed you will see an error message and the file will not upload. Go back to it, complete the missing assessments and then try again.

You can use the same method to upload the assessments for multiple respondents.

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22. Analysis and results

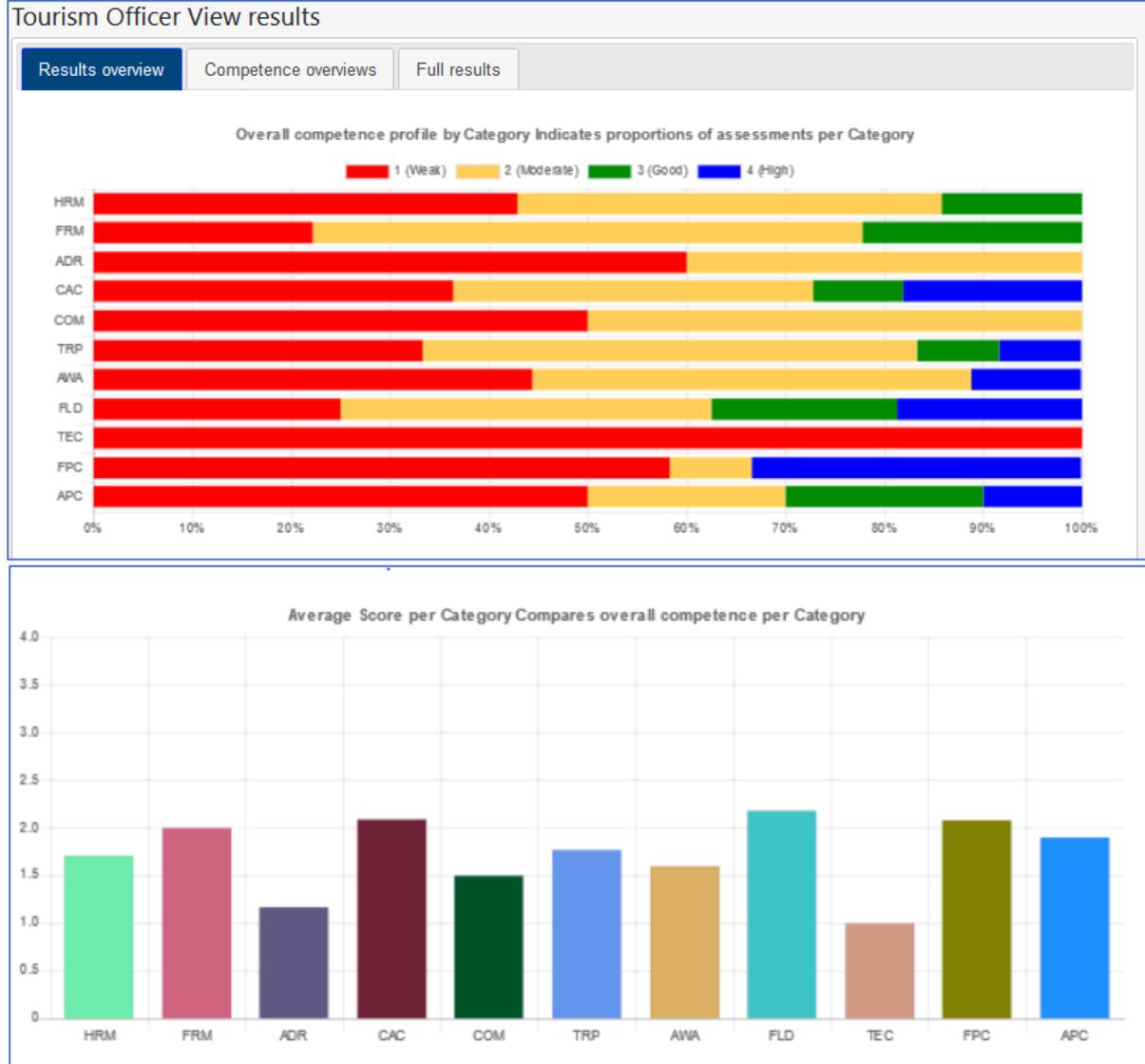
Once you have created or uploaded an assessment you will be automatically taken to the results pages for it. These have three tabs.

Tab 1 Results overview

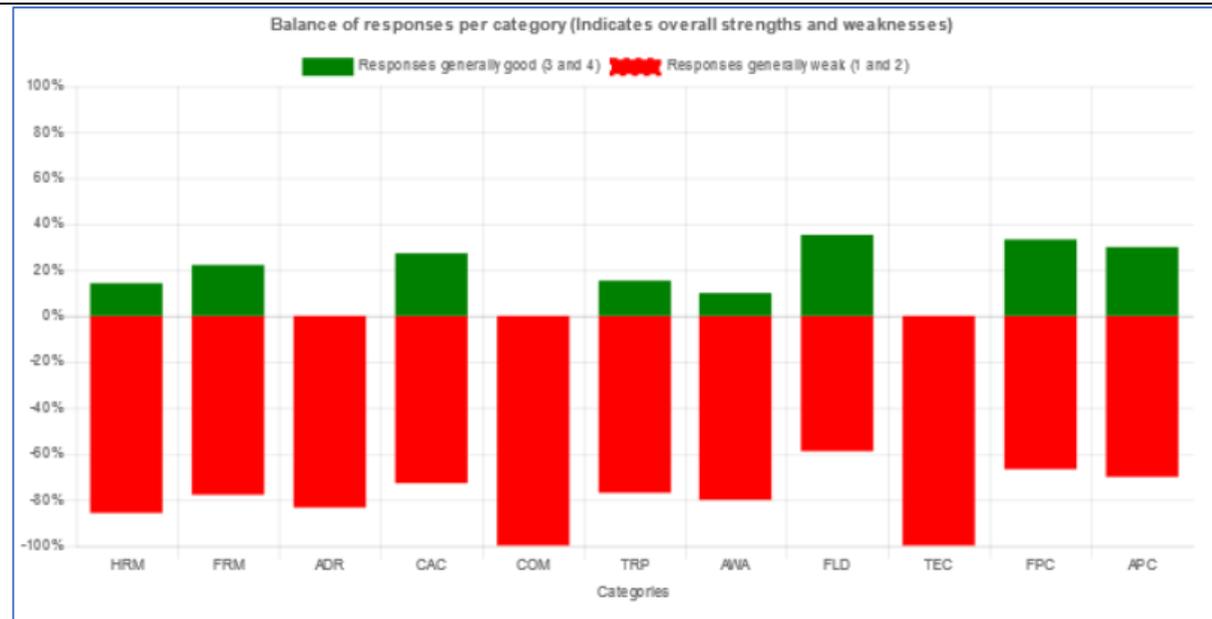
This gives an overall picture of the results by category, presented in four different ways.

Graph 1. This shows the proportions of total 1,2,3 and 4 responses, colour coded for each category. It provides a comparative indication of strength and weakness in each category (but not for each individual competence). In the example, there are a lot of weaknesses (most of the assessments are in the two weakest bands (1 or 2). TEC (technology) and ADR (administrative documentation and reporting) are particularly weak. This person clearly needs a lot of training.

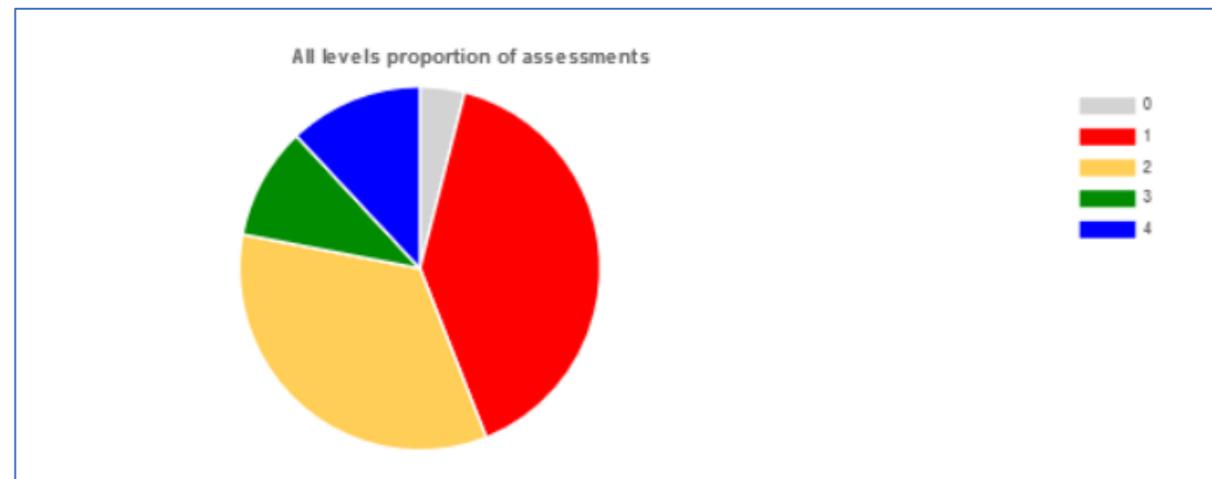
Graph 2 shows the average score for all the assessments made for each category



Graph 3 shows the relative proportions of responses for each category that are generally weak (1 and 2: below the line, in red) and generally strong (3 and 4: above the line in green). The provides an indication of overall strengths and weaknesses

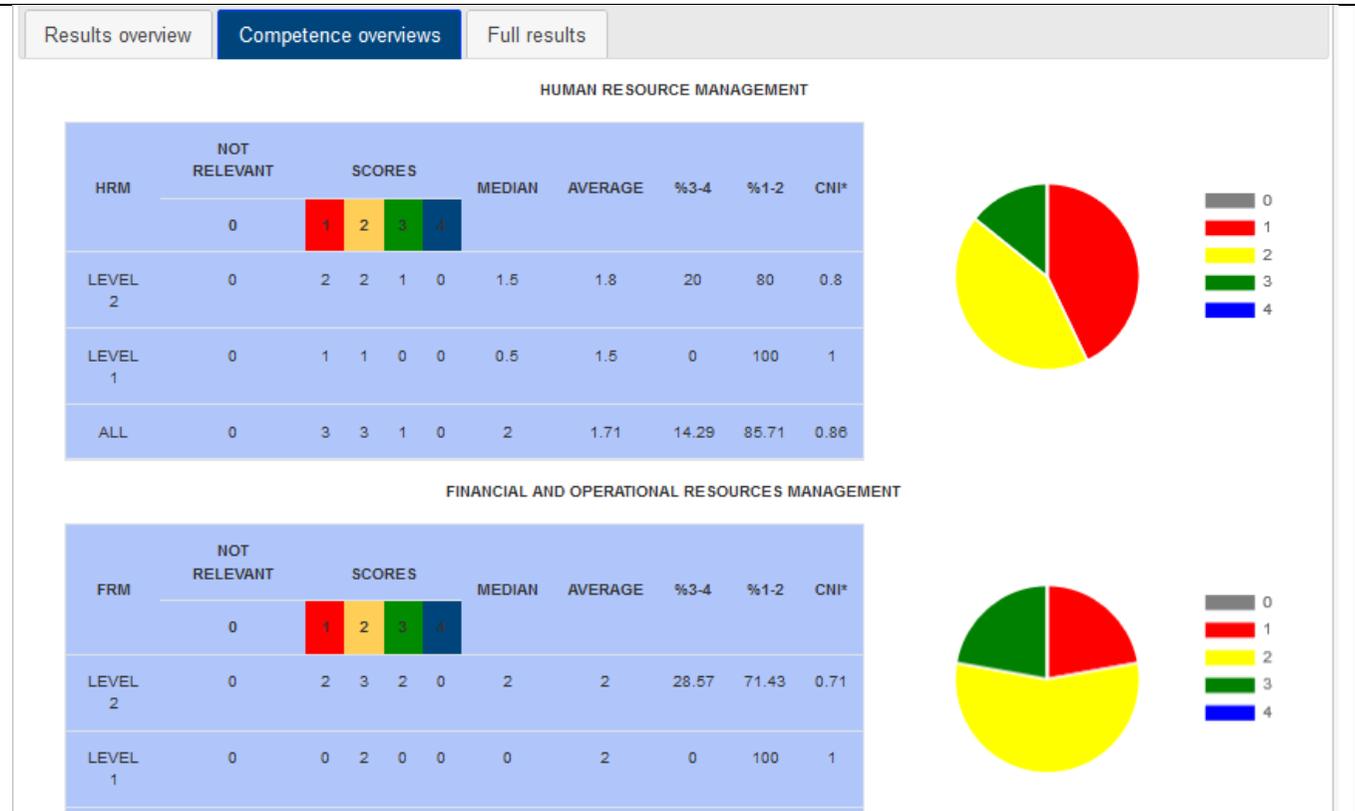


Graph 4 shows the overall proportions of all assessments in all categories, indicating the overall competence of the respondent.



Tab 2 Competence overviews

This provides more details for each category, indicating the numbers of responses for each assessment (1,2,3,4) at each level, providing medians and averages and calculating capacity needs indices (CNI). The CNI is the proportion of assessments that are weak (1 or 2). The higher the CNI, the greater the capacity need.



Tab 3 Full results

This shows all the responses for every competence assessed and provides the most comprehensive overview of the results.

The results can be sorted, ordered and filtered in many ways.

The arrows at the tops of the columns sort that column by alphabetical or numerical order. So for example clicking the arrow at the top of the right most column will sort all the assessments by band (0, 1,2,3 or 4)

The filters at the bottom of the columns enable you to select particular records. For example, the Select box at the bottom of the third column enables you to choose any competence by its code.

The best way to learn how to use these tools is to experiment. They do enable you to identify the specific areas where competence is good and where capacity is needed.

Results overview | Competence overviews | **Full results**

Show entries Search:

Category	Level	Code	Competence element	Results
ADR	ADR 1	ADR 1.1	Maintain records of work activities.	1
ADR	ADR 1	ADR 1.2	Prepare basic written reports of work activities.	2
ADR	ADR 2	ADR 2.1	Prepare analytical and technical reports and assessments.	0
ADR	ADR 2	ADR 2.2	Prepare formal reports of activities and projects.	1
ADR	ADR 2	ADR 2.3	Contribute to and document meetings.	2
ADR	ADR 2	ADR 2.4	Ensure and maintain accurate and secure documentation of data, activities and events.	1
APC	APC	APC 01	Demonstrate analytical skills.	4
APC	APC	APC 02	Address complex problems.	1
APC	APC	APC 03	Make effective decisions.	1
APC	APC	APC 04	Cope with hazardous working environments.	2

Select Select Select Select

Showing 1 to 10 of 100 entries Previous 2 3 4 5 ... 10 Next

23. Analysing Multiple Results

(Relevant to Assessors only)

So far we have seen how to view the results from one assessment, but you can also look at the combined results for all those assessed using the same profile by clicking the View Combined Results button on the Dashboard

Also on the job profile page, you will see a list of all the individuals assessed. You can review their assessments individually using the View button

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Assessment Name	Created Date	Actions
PTNP Ranger 01	11/08/2020 06:35:17	View
PTNP Ranger 01	11/08/2020 06:35:18	Incomplete
R101	11/08/2020 10:14:39	View
R103	11/08/2020 13:22:40	View

24. View Combined Results

(Relevant to Assessors only)

Clicking on 'View Combined Results' shows the same set of graphs, but these combine all the responses of all those assessed using the same job profile, giving you an overall picture of the strengths, weaknesses and needs of the entire group.

This helps you identify overall strengths and weaknesses and to prioritise capacity development support.

The Full Results tab enables you to compare and sort the results of all those in the assessment group side by side. You can see who has scored more or less for each competence, and therefore identify those who could be acting as mentors and trainers, and those who may need particular support.

Tourism Officer View results

Assessment Date From 10/08/2020 To 11/08/2020 [Filter Results](#)

Results overview **Competence overviews** Full results

Show 10 entries

Search:

Category	Level	Code	Competence element	Results		
				PTNP Ranger 01	R101	R103
ADR	ADR 1	ADR 1.1	Maintain records of work activities.	3	1	3
ADR	ADR 1	ADR 1.2	Prepare basic written reports of work activities.	3	2	3
ADR	ADR 2	ADR 2.1	Prepare analytical and technical reports and assessments.	3	0	3
ADR	ADR 2	ADR 2.2	Prepare formal reports of activities and projects.	3	1	3
ADR	ADR 2	ADR 2.3	Contribute to and document meetings.	3	2	3
ADR	ADR 2	ADR 2.4	Ensure and maintain accurate and secure documentation of data, activities and events.	1	1	1
APC	APC	APC 01	Demonstrate analytical skills.	2	4	3
APC	APC	APC 02	Address complex problems.	2	1	3
APC	APC	APC 03	Make effective decisions.	3	1	2
APC	APC	APC 04	Cope with hazardous working environments.	1	2	1

Showing 1 to 10 of 100 entries

[Previous](#)

[Next](#)

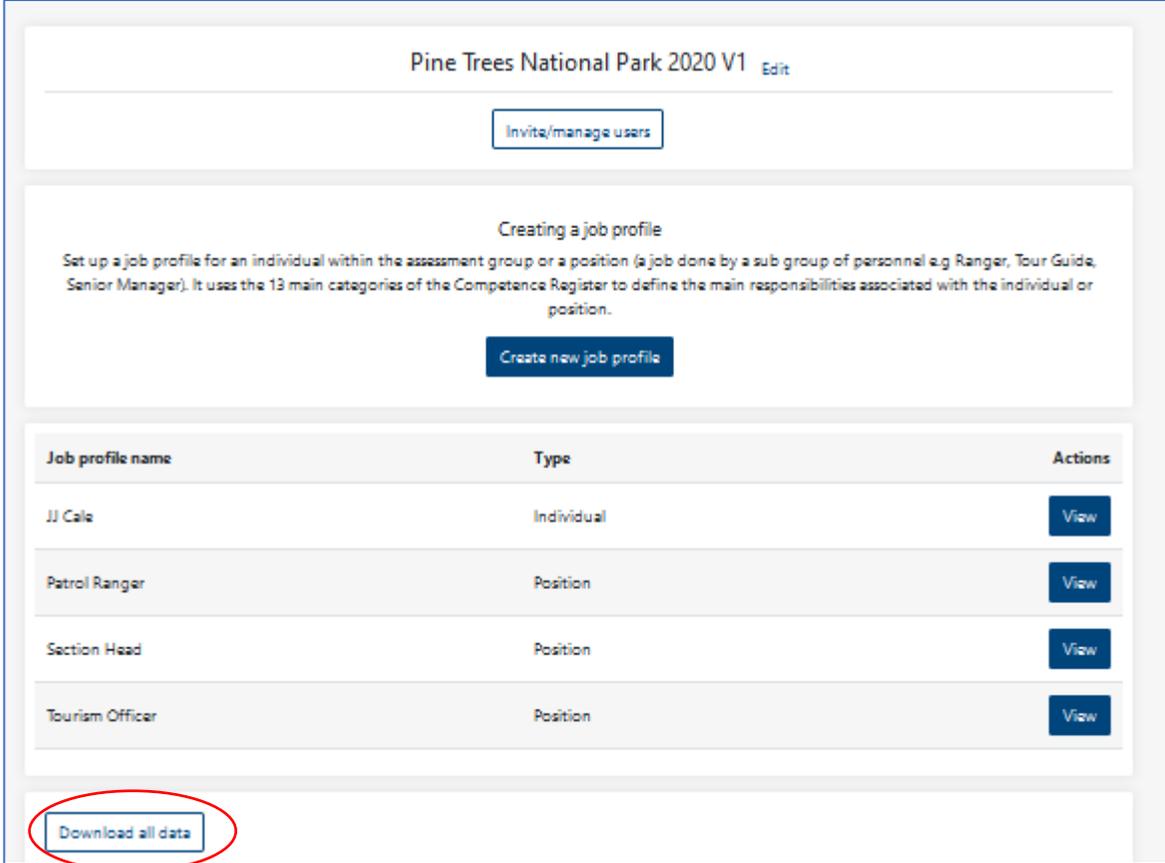
25. Download All Data

(Relevant to Assessors only)

You can also download all the raw data from an Assessment Group, using the Download All Data button

The generates a Zip folder containing an Excel workbook for each Job Profile in the user group. These workbooks contain all the raw data from all the assessments.

With some experience of using Excel, you can use this information to analyse and present the data in any way you wish.



The screenshot shows the 'Pine Trees National Park 2020 V1' app interface. At the top, there is a title bar with 'Pine Trees National Park 2020 V1' and an 'Edit' link. Below the title bar, there is a button labeled 'Invite/manage users'. The main content area is titled 'Creating a job profile' and contains a paragraph of text: 'Set up a job profile for an individual within the assessment group or a position (a job done by a sub group of personnel e.g Ranger, Tour Guide, Senior Manager). It uses the 13 main categories of the Competence Register to define the main responsibilities associated with the individual or position.' Below this text is a button labeled 'Create new job profile'. A table is displayed below the button, with columns for 'Job profile name', 'Type', and 'Actions'. The table contains four rows of data:

Job profile name	Type	Actions
JJ Cale	Individual	View
Patrol Ranger	Position	View
Section Head	Position	View
Tourism Officer	Position	View

At the bottom of the interface, there is a button labeled 'Download all data', which is circled in red.

26. Upgrade

If you have followed the one-off assessment route, you will be asked if you want to upgrade your account to be an Assessor. This gives you access to all the functions of the App.

We hope you find this app useful.

Please report any problems to mappleton@rewild.org and we will try to fix them.