



**Sheffield &
Rotherham**
Wildlife Trust



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**Heritage
Fund**

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Self-Assessment Tool / Database Developer - Tender Brief

Overview

On behalf of the Evidence Emergency Partnership¹, Sheffield and Rotherham Wildlife Trust (SRWT) has received funding from the Heritage Innovation Fund, to deliver a project called Evidence Emergency Phase 3 (Test Phase).

We are looking to further develop and test solutions to our workforce challenge: we have identified shortcomings in the way we collect, use and disseminate conservation evidence and data, across the Wildlife Trusts movement.

Our Vision

Our vision for the Test Phase of the Evidence Emergency project is to develop and test:

1. **Evidence Competency Framework** - to specify levels of competence relating to different evidence competency areas; and
2. **Self-Assessment Tool** - to enable Wildlife Trust staff to identify their current competency levels in different areas and receive training recommendations;
3. **Database** - to collate the results of staff self assessments in one place.

Our **Evidence Competency Framework** is currently being developed by the Evidence Emergency Partnership in consultation with Wildlife Trust staff. It covers competencies within areas of activity relevant to the work undertaken across the Wildlife Trust movement. The competencies are specifically evidence focussed. Each competency has four different levels, with descriptions of what would typically be expected of someone working at each level. A draft of our competency framework can be viewed [here](#). The competency areas as they currently stand are: Surveying & Monitoring, Land Management, Education & Engagement, CEO/Trustee, Evidence-based Practice, Data/Digital, GIS, Communications & Publishing.

The next step is to develop a **Self-Assessment Tool**, based on the Evidence Competency Framework and therefore enable Wildlife Trust staff to identify their strongest competencies and to identify areas where training may be required to improve their competency(ies) to the desired level.

We also want to be able to collate the results of the self assessments in a **Database**, so that we can identify the strengths of key staff (and Wildlife Trusts) for internal skills sharing, and also to enable us to analyse the gaps via data visualisations and summary statistics for example. We want to be able to use the data held within this database as evidence to inform impact reporting, funding applications and to provide evidence of the impact of the Self-Assessment Tool and Database development process to feed into our reporting for the Evidence Emergency Test Phase.

¹ Consisting of Sheffield, Gloucestershire, Kent, Surrey and Gwent Wildlife Trusts, The Royal Society of Wildlife Trusts and external partner Conservation Evidence.



We would like you to develop the Self-Assessment Tool and Database and we have outlined our 'minimum viable product' as follows.

Minimum Viable Product

We currently envision staff to be able to undertake something like the following process using a **Self-Assessment Tool** via an online form (this is based on the [CIEEM Self Assessment Tool](#)):

- Step 1:** Choose the first **competency area** that you will assess (of those that are relevant to you).
- Step 2:** Enter your email address (required so that the output from the self-assessment can be sent to you).
- Step 3:** Start at the lowest competence **level** (level 1) and work your way up through the levels (to level 4).
- Step 4:** Read the competence level indicator statements and answer with a Yes/No according to whether or not you have carried out what is described to the required standard on several occasions and are competent at that level.
- Step 5:** When you have finished with that competence level you will be given the opportunity to provide any **feedback** and also indicate whether you think you require **training** to improve on that level before you try the next level.
- Step 6:** Once you have submitted your responses, the outcome of the self-assessment will be emailed to the address you gave in Step 2. The outcome will include the competency **levels** reached for each competency assessed; it will highlight your competency **strengths**, and also provide recommendations for **training** to obtain higher competency levels (where suggested by the assessment process or requested by the individual undertaking the assessment).
- Step 7:** Choose whether to try another **competency area** and repeat from Step 1.

However, we are open to new ideas and would welcome any thoughts from you about how the Self-assessment Tool could work. For example, ideally, staff would only receive an email with the results of their entire assessment, rather than an email for each competence assessed, as indicated above, or there may be direct links to the database.

We want the Self-Assessment Tool to be an **Ongoing Tool** that we can use and update in-house after initial development. To that end, we would like the tool to be handed over to us with training and full documentation after this piece of work has been completed. We would also need to have an understanding of administrative needs, including how to update the framework, remove users etc., if needed. The Self-Assessment Tool and Database must be set up to accommodate any future changes to the content of the Competency Framework.

The tool must be **User Friendly** and **Accessible**, complying with Web Content Accessibility Guidelines 2.1 at level AA. There must be information provided within the Tool itself to instruct users on how to undertake the assessment, i.e. minimal additional training/support should be required. Preferably, users would be given the option to save their assessment as a draft and be able to return to it before submitting, rather than have to complete the whole assessment in one go.

As well as allowing staff to self-assess their competencies, we want to give them the opportunity to **Feedback** their thoughts into the process as they are undertaking it. We intend to use this feedback for future refinement of the Tool and would like there to be a mechanism for collating and summarising the results of this feedback and actioning these if possible as part of the tool development.

We want the results of the self assessment to feed directly into an **Accessible Database** that is live and will be continually updated as more self assessments are undertaken. It should be able to accommodate self-assessment results generated by staff across the Wildlife Trust movement. It should be easy to filter



by categories such as Trust, name, date etc. and search for key words, people and skills/knowledge, for example. Individuals should be able to view their results in an easy-to-understand way, such as a summary results page.

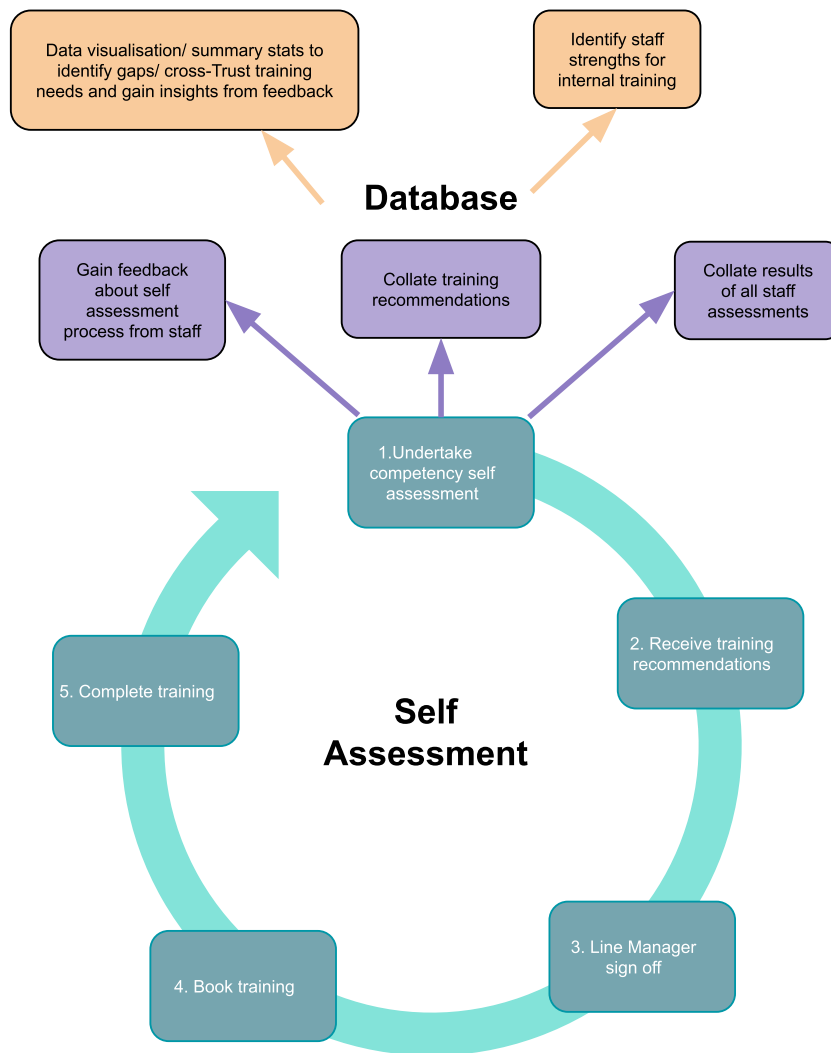
The database must meet industry standards for **Security** and comply with our Cyber Security Framework. Essentially, appropriate technical security measures must be implemented. For data security, this includes encrypting all personal data at rest and in transit and backing up data according to its value and sensitivity. For identity and access management, this includes limiting access to personal data, using multi-factor authentication where appropriate (e.g. public facing) and restricting privileged access. For vulnerability management, all systems, including anything internet connected, should be patched and updated.

We want to ensure that recommendations for training are embedded in our Self-Assessment Tool process and we are currently developing links within our Competency Framework to **Training** recommended for each competency and training providers for this - this training might be internally provided, externally provided or self serve. We envision staff being able to complete the self assessment, receive their results and also receive recommendations for training at the same time (these recommendations would also be stored in the live Database). Being able to identify the strongest staff and Wildlife Trusts in certain competency categories would also help us to identify staff who may be able to deliver training internally.

Ways of addressing potential barriers around users wishing to remain **Anonymous** must be built into the design. For example, access controls to allow specified individuals (such as line managers) to view user results on the Database and providing individuals with the ability to choose what they want to be visible to all. Alternatively, the Database could be separated out whereby strengths (where competencies are met - possibly only at Level 4) are viewable to all but training recommendations (where competencies are not met) are only viewable to users and individuals they choose to share this with.

Our ambition is for the design of the Self-Assessment Tool and Database to be **Open Access** for others to use and adapt for their own purposes, such as through a Creative Commons license. This is in line with our [funder's guidance](#) that any tool we create needs to be available, open and accessible.

Ultimately, our vision is for the following process:



Budget

The budget available to fund this work is: **£10,000 incl. VAT.**

Timescales

The timescales for this work are shown in Appendix 1.

Contact

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Tenders must be received by **5th February 2024.**



Appendix 1

Action	Month					
	J	F	M	A	M	J
Send out tender document	January (start week 4)					
Deadline for receipt of tenders	5th February 2024					
Commission Self-Assessment Tool/Database developer		Early-February (week 2)				
Start of Self-Assessment Tool/Database development		Before end-February (week 4)				
Development period for Self-Assessment Tool/Database			March			
Soft launch of Self-Assessment Tool to restricted group (prototype testing)				Early - April (week 1)		
Results (self assessment/ feedback) received from Self-Assessment Tool in Database					Early-May (week 1)	
Feedback of analysis of gaps/insights gleaned from Database					Mid/End-May (week 4)	
Attendance at Steering Group meeting to discuss findings						5th June, 12.30-2.30pm

