The Self Assessed Skills Audit Tool

(SASAT-CoRE)
Team and service profile user guide

This skills audit was originally developed as part of the National CAMHS Workforce Programme. The original authors have further developed the tool in partnership with ChiMat to take into account the importance of Outcomes measurement and the indicative skills to respond to evidence based guidance.

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The Self Assessed Skills Audit Tool (SASAT-CoRE)

Foreword

The importance of ensuring that organisations have the right workforce with the right skills and knowledge to deliver effective services is recognised by all and a key ingredient in building an effective workforce (NHS Plan)

Planning and Developing the NHS Education (2010) identifies that planning and developing the workforce as the bedrock in the providing the high quality affordable care that people rightly expect. In considering the many regional Workforce, Education Commissioning Strategies two key factors are referred to as critical in ensuring the workforce is confident, supported, affordable and competent:

- Long term workforce planning and the development
- Embedding of a learning culture

This SASAT-CoRE has been developed to help address these factors by gathering self-assessed information (not objectively measured) that will help inform workforce planning and develop a learning organisation

Completion of the SASAT-C0RE represents an important starting point to gathering key information to support ongoing organisational development by mapping the current skills and knowledge that staff have and use, and supporting the identification of any gaps in current and future education and learning provision.

Intended Outcomes of the SASAT-CoRE

- To determine whether the organisation can meet its indentified goals and provide a framework for organisational development.
- To enable a targeted analysis of learning and development needs and allow for a more systematic and targeted approach to training
- To Identify self assessed skills and knowledge within the organisation and provide an understanding of existing gaps and the skills required.
- To support and inform a learning and development strategy for all staff: (*Working Towards a Fully Qualified Workforce: NHS 2008; A High Quality Workforce: NHS Next Stage Review; NHS 2008*).
- To provide Information that supports dynamic succession planning and targeted recruitment.
- To support quality and productivity agenda.

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Implementation of the SASAT-CoRE

The questionnaire allows you to identity your current skill and level, Identify interests and confidence levels and highlights your training needs.

When completing the questionnaire remember:
- *it is not a competition*
- *everyone in the team does not need the same skills*
- *some skills are useful to have in several people, whereas others may need only one person to make them available*
- *skills can be gained through a qualification, experience or a combination of both*
- *the matrix can highlight missing or depleted skills in the team, and can be used to plan best use of the training budget available*
- *It is a starting point for discussion, not an end in itself*

The tool can be used at the following levels:
- **Individual level** - the SASAT-CoRE supports the production of an individual self assessed profile (Part 3) and a knowledge and skills analysis and matrix (Part 4). The information gathered will provide a baseline for an annual re-audit and a training needs analysis (TNA) that will inform individual's appraisal/ development reviews/PDP.
- **Team level** – the SASAT-CoRE enables each individual team member to contribute to a team profile (Part 5) and knowledge and skills analysis and matrix. The information gathered will assist in understanding team member's roles; functions and skill sets, identify training needs and support succession planning.
- **Service level** – the SASAT-CoRE enables the collation of team profiles to create service profiles (Part 6). The service profiles will assist in the production of a training needs analysis, mapping presenting clinical need with skill sets, identifying current and potential gaps and planning future service development/design as part of the workforce planning cycle.

It is recognised that training and learning needs change with time so a recurrent self-assessment is required. The Tool may also need to be adapted to meet the needs of your particular team.

Components of the SASAT-CoRE

- **SASAT-CoRE** - User guidance on the tool
- **SASAT-CoRE questionnaire** –Microsoft Excel workbook
- **SASAT-CoRE** – User guidance on the tool
- **SASAT-CoRE team** – Microsoft excel workbook
- **SASAT-CoRE service** – Microsoft excel workbook

SASAT-CoRE questionnaire – see SASAT-CoRE Questionnaire user guide

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SASAT-CoRE team profile

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Team/Service knowledge and skills mix
Training gaps
Potential inefficiencies
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Demographics

SASAT-CoRE service profile
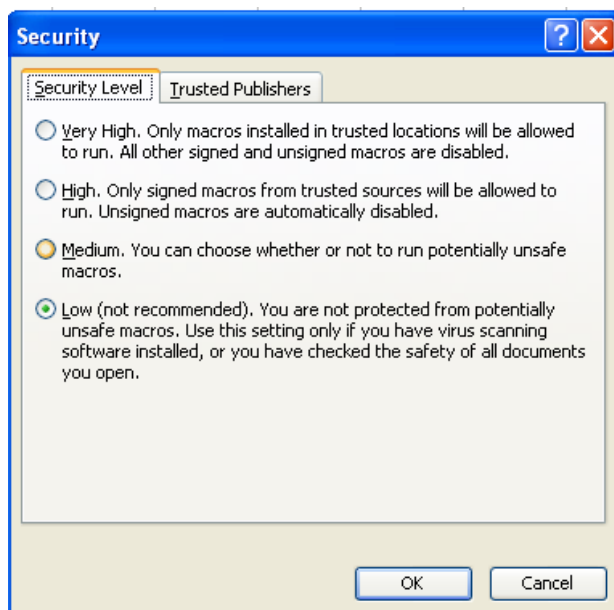
Part 6
Service profile

The SASAT-CoRE team profile

Introduction
- Save the extracted SASAT-CoRE team profile into a file onto your computer.

- Open the SASAT-CoRE team profile onto your desktop

- Ensure you have enabled your macros in Excel. To do so in Excel 2003 go to tools/ macros/security and you will be presented with this box:

- Click low or medium and 'OK'.

In Excel 2007 you will be prompted with a Security Warning.

- Click on the 'Options' button
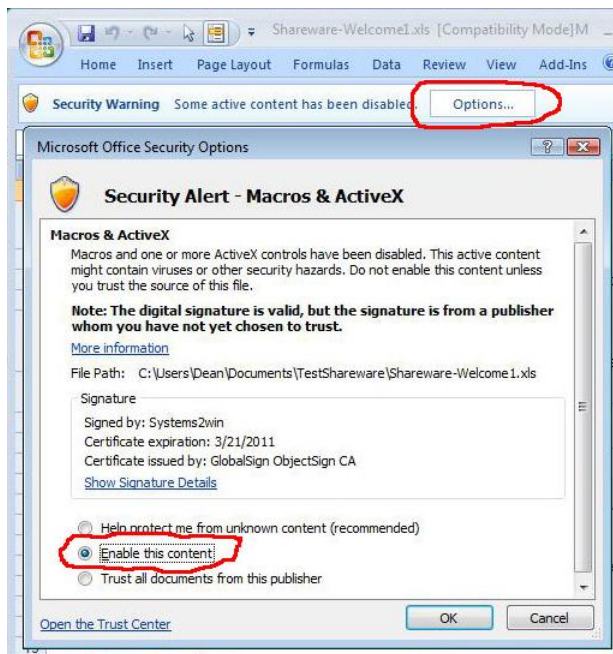
- Click 'Enable the content' and 'OK'.

Transferring your team members data into the SASAT-CoRE

- Go to the file containing your Excel document entitled 'SASAT-CoRE questionnaire' to begin transferring your individual questionnaires.

- Open the saved SASAT-CoRE individual questionnaire

- Go to the top left hand corner of the individual questionnaire where you will find a drop down box.
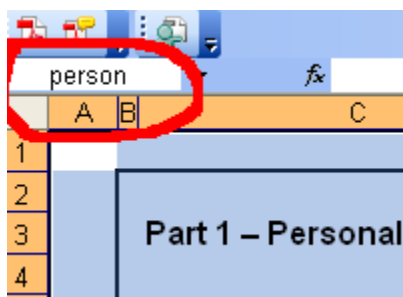
- Choose 'person' and this will highlight the personal details area.

- This can then be copied (CTRL + C) and pasted (CTRL + V) into the 'personal details' page in your team SASAT-CoRE work book.

- Then go to the individual questionnaire and select 'answers' in the top left hand drop down box.
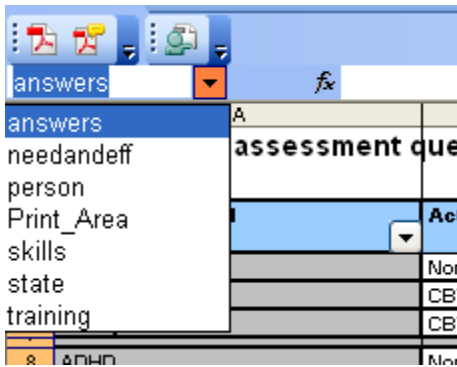
This will highlight the columns which should have answers in.

Part 2 – Self assessment questionnaire for

Check my responses

Component/ Skill	Activity	Interested	Confident	Skilled	None	Level of training	Use of skill
Anxiety	Non specific approach						
Anxiety	CBT group						
Anxiety	CBT individual						
ADHD	Non specific approach						
ADHD	Diet Advice						
ADHD	Parent training Group						

- Again this can then be copied (CTRL + C) and pasted (CTRL + V) into the 'questionnaire' page of your SASAT-CoRE team work book.

We recommend you click on the 'Check my responses' button to check your team member has answered all the questions.

Part 2 – Self assessment questionnaire for

Component/ Skill ▼	Activity ▼	Interested ▼	Confident ▼	Skilled ▼	None ▼	Level of training ▼	Use of skill ▼
Anxiety	Non specific approach						
Anxiety	CBT group						
Anxiety	CBT individual						
ADHD	Non specific approach						
ADHD	Diet Advice						
ADHD	Parent training Group						

If necessary get your team member to complete any missing answers in the questionnaire before continuing.

- If you are happy click on the 'Go to my profile button' and then click then 'Export to Team Profile' button on your SASAT-CoRE team work book

> Export to team workbook

- You can navigate back to the front page by clicking on the 'Back to Introduction' button.

> Back to introduction

Adding more individual questionnaires to your SASAT-CORE team workbook?
Don't forget to clear down the answers to the 'personal details' and 'questionnaire' before copying over a new set of answers.

- This can be done by clicking on the 'reset questionnaire button' on the personal details page.

> **Reset questionnaire**

Part 5 - Team profile

- Click on 'Team profile' tab (example of profile below) you may wish to present your profile in a pie chart.

	I feel confident and skilled in the following	I feel confident in the following	I feel interested and confident in the following	I feel interested and skilled in the following	I feel interested in the following	I feel interested, confident and skilled in the following	I feel skilled in the following	I have indicated none for the following	I have not entered anything for	Grand Total
Total	12.85%	13.62%	5.85%	3.43%	26.34%	15.85%	13.19%	8.87%	0.%	100.00%

The self assessment individual profile demonstrates the self assessed skill level indicated in columns 3-6 of the questionnaire. It will indicate what the team/service are confident in, interested in and so on.

- Click on the 'Team members' tab to access information to assist in your collation (see Excel workbook for part 5 team profile)

- Use the Excel workbook to compile the self assessment using the Red/Amber/Green rating guide to code your components

Team/service totals									Components
Interested, Confident & Skilled	Confident & Skilled	Interested & Skilled	Skilled	Interested & Confident	Confident	Interested	None	Full Total	
6	0	4	2	0	3	3	2	**20**	Anxiety-Non specific approach
2	0	0	2	2	0	5	9	**20**	Anxiety-CBT group
3	0	0	3	2	1	7	4	**20**	Anxiety-CBT individual
3	1	1	3	1	3	3	5	**20**	ADHD-Non specific approach
2	2	1	3	2	2	3	5	**20**	ADHD – Diet advice
1	0	1	3	2	1	5	7	**20**	ADHD-Parent training Group
1	0	0	2	3	3	3	8	**20**	ADHD-Parent training -Individual/couple
1	0	0	1	0	0	2	16	**20**	ADHD-Prescribing

Team knowledge and skills mix

- Click on team knowledge and skills mix, training gaps and inefficiency tabs to gather data.

efficiency							
	Training need	Potential inefficiency	training	Use of skill	training	Use of skill	Skill rating
High/low	2	-2	high	low	3	1	3=high
High/medium	1	-1	high	medium	3	2	2=medium
high/high	0	0	high	high	3	3	1=low
Medium/low	1	-1	medium	low	2	1	
Medium/medium	0	0	medium	medium	2	2	

Level of training rating		Use of skill rating	
Low	0 No training received 1 Self directed study 2 In house training 3 Day course	Low	1 Never/rarely
Medium	4 Certificate or equivalent level 5 Diploma or equivalent level	Medium	2 Occasionally
High	6 Degree 7 Masters level or above	High	3 Frequently

<table>
<tr><td rowspan="4">Level of training</td><td>Low 0 No training received
1- 3 In house training / self directed study / day course</td><td>2
training need</td><td>0</td><td>0</td></tr>
<tr><td>Medium 4 Certificate or equiv. level
5 Diploma or equiv. level</td><td>1
training need</td><td>0</td><td>0</td></tr>
<tr><td>High 6 Degree
7 Masters level or above</td><td>0</td><td>1
potential inefficiency</td><td>-2
potential inefficiency</td></tr>
<tr><td style="text-align:center">Potential inefficiency</td><td>High 3</td><td>Medium 2</td><td>Low 1</td></tr>
<tr><td></td><td colspan="3">Use of skill frequency</td></tr>
</table>

Training gaps

- Click on the training gaps tab. Here you can see where team members are using a skill however they do not believe they possess high level of training. A score of two means they are in need of training the most whilst a score of one recognizes the need however it is less necessary.

Potential inefficiencies

- Click on the potential inefficiencies tab. Here you can see where team members are highly trained in an activity however they do not use the skill. You may wish to consider how to best harness these skills.

An example is below:

	Description	John	George	Paul	Ringo	Grand Total
2	Liaison Psychiatry-Liaison Psychiatry			1	1	2
1	ADHD-Non specific approach	1				1
	ADHD-Parent training - Individual/couple			1	1	2
	Anxiety-CBT individual			1	1	2

Demographics

- Click on the 'demographics' tab, you will find age profile, gender profile and length of service for all team members presented in pie and bar charts

The SASAT-CoRE service profile

Transferring your team members data into the service profile

- Save the extracted 'service profile' Microsoft Excel document to your computer

- Open the Excel document

- Open the team profile SASAT-CoRE, click on the team member tab and copy the team member data

- On the 'service profile ' Click on the 'service member' tab then paste the selected data onto the page

- Go to the far right of the page and press the update button   Update

- On the 'team profile' SASAT-CoRE, click on the 'team data' tab and copy the team member details

- On the 'service profile' click on the 'service demo data' tab and paste the selected data onto the page

- Repeat this process to collate all your team profiles onto the service profile

The service profile

- Click on the 'service profile' tab (example of profile below) you may wish to present your profile in a pie chart.

	I feel confident and skilled in the following	I feel confident in the following	I feel interested and confident in the following	I feel interested and skilled in the following	I feel interested in the following	I feel interested, confident and skilled in the following	I feel skilled in the following	I have indicated none for the following	I have not entered anything for	Grand Total
Total	12.85%	13.62%	5.85%	3.43%	26.34%	15.85%	13.19%	8.87%	0.%	100.00 %

- Click on HL comp (example of profile below. You may wish to highlight where a component is on both the low/high and high/low tables. You may wish to explore the potential for using those with high levels of training to support those with low training

Low training High use of skills		High level of training Low use of skills	
knowledge and skills mix	Low High	knowledge and skills mix	High Low
matrix desc	Total	matrix desc	Total
Eating Disorders (bulimia)-CBT	12	Conduct Disorder-Non specific approach	2
Obsessive-Compulsive Disorder (OCD)-Behaviour Therapy	14	ADHD-Non specific approach	1
Post traumatic Stress Disorder (PTSD)-Non specific approach	5	Autism and Asperger's-Non specific approach	1
Depression-Non specific approach	12	Depression-Non specific approach	5

Knowledge and skills mix

- Click on knowledge and skills mix, training gaps and inefficiency tabs to gather service data

efficiency							
	Training need	Potential inefficiency	training	Use of skill	training	Use of skill	Skill rating
High/low	2	-2	high	low	3	1	3=high
High/medium	1	-1	high	medium	3	2	2=medium
high/high	0	0	high	high	3	3	1=low

Training gaps

- Click on training gaps tab. Here you can see where service members are using a skill however do not believe they possess high level of training. A score of two means they are in need of training the most whilst a score of one recognizes the need however it is less necessary.

Potential inefficiencies

- Click on potential inefficiencies tab. Here you can see where service members are highly trained in an activity however they do not use the skill. You may wish to consider how to best harness these skills.

Service demographics

- Click on the 'demographics' tab, you will find age profile, gender profile and length of service for all team members presented in pie and bar charts

References

Department of Health (2008) *NHS Plan*

Department of Health (2008) *A High Quality Workforce: NHS Next Stage Review*

Department of Health (2010) *Planning and Developing the NHS Education*

Department of Health (2008) *Working Towards a Fully Qualified Workforce:*