



# Equitable Research Partnerships Toolkit

## Tool 7: Skills and Roles Assessment Questionnaire

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The Skills and Roles Assessment Questionnaire facilitates the systematic identification and assessment of the 'fit' between the skills held by different partners, and the roles they will play. The tool considers skills and roles in relation to the management of the partnership, highlighting things such as leadership, as well as research (scientific) skills.

#### Why use the Skills and Roles Assessment Questionnaire tool?

Using the Skills and Roles Assessment Questionnaire helps to ensure that the roles that people take on within a partnership are well matched to their existing skills and/or the skills that will be built throughout. Matching skills and roles has important equity implications, especially when applied to things like career development opportunities and performance recognition. This tool enhances equity in a research partnership by:

1. Documenting and recognising the skills all partners bring to a partnership.
2. Explicitly identifying the roles that different partners will be expected to take on.
3. Identifying potentially inappropriate or inequitable role allocations, that may result in partners not receiving adequate recognition or opportunity.
4. Identifying opportunities/needs for capacity building and mentoring within a research partnership.

#### When to use the Skills and Roles Assessment Questionnaire tool?

Phase	Rating	Descriptions
Planning	•••	The Skills and Roles Assessment tool is ideally used to in the <b>planning</b> stage.
Implementing	•	The tool can be adapted for use in the implementing stage.
Disseminating	•	The tool can also be adapted for use in the disseminating stage.
Sustaining	•••	The Roles and Skills Assessment can be used to identify skills and allocate roles for future partnership activities, in the sustaining stage.

#### Ratings

••• Designed for this stage | •• Can be used as is in this stage | • Can be adapted for use in this stage



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How long does it take to use the Skills and Roles Assessment Questionnaire tool?

### Rapid approach

- A rapid approach to using this tool might involve each partner or member of the partnership completing the questionnaire as a self-assessment, with no discussion. This would take each person 15-30 minutes.

### Intensive approach

- An intensive approach to using this tool might involve asking each partner or member to complete the questionnaire individually (as in the rapid approach), then coming together as a group to discuss skills, and make decisions about roles of each partner, in a meeting or workshop. This approach would require an additional one to two hours.

What other resources do you need to use the Skills and Roles Assessment Questionnaire tool?

- [Skills and Roles Assessment Questionnaire template](#)
- For a meeting-based implementation:
  - Face-to-face meeting space or virtual meeting forum.
  - A facilitator and note taker.
  - Projection or screen sharing facility.

How to use the Skills and Roles Assessment Questionnaire tool?

### **Preparation (individual assessment)**

1. Download the [Skills and Roles Assessment Questionnaire template](#).
2. Modify the criteria for assessment, by adding or removing criteria as necessary, to make the questionnaire optimally appropriate for your partnership. This may be done in a group setting or by a nominated individual. For example, the questionnaire could be modified by:
  - a. Adding more specific research skills that might be needed or desirable within your research partnership. These could be things like qualitative or quantitative design or analysis skills, or specific laboratory techniques.





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### Group meeting

7. Display the Skills and Roles Assessment completed by one of the partners.
8. Ask the partner whose assessment is being displayed to briefly (e.g. in two to five minutes) summarise their results and highlight one or two results that were especially significant for them.
  - a. In new research partnerships it may be useful to organise one or two participants to share their results in advance of the meeting.
9. Ask other members of the group to discuss the results of the assessment for 5-10 minutes. Ask questions (see below for suggestions) to get people talking.
10. Repeat steps 7-9 until all assessments have been discussed.
11. Display the Partnership overview sheet.
12. Ask members of the group to discuss the results of the overview for 15-20 minutes. Ask questions (see below for suggestions) to get people talking.
13. As a final step, you may wish to make a list of proposed or decided changes, to roles and/or actions, that will be taken to enhance skills. Alternatively, a note taker could write down any proposed actions as the discussion occurs.

### Suggested questions to explore when using the Skills and Roles Assessment Questionnaire tool

#### Individual partner assessments

- To what extent are the expected roles of the partner equitable? What could be done to increase equity in this partner's role allocation?
- How would changes in role allocation influence the effectiveness of the partnership (i.e. the ability to conduct the research rigorously and timeously)?
- How might skills development influence equity in role allocation, for example by enabling changes to partner roles?



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- Are there any assessments that you disagree with? For example, you may think that a partner is more or less skilled than they have assessed or will/should play a smaller or larger role than they have indicated.

### Partnership overview

- Which skills are duplicated in the partnership (indicated by very high overall scores)?
- Which skills are lacking (indicated by very low overall scores) How could these skills be developed within or brought into the partnership?
- Which roles are not adequately filled (indicated by very low scores)? What could be done to ensure these roles are filled?
- How equitable is the division of roles within the partnership?

### Tips for using the Skills and Roles Assessment Questionnaire tool

- Use the tool to assess skills and roles at a partner (i.e. institutional) or individual (i.e. researcher) level.
- Use the tool with the understanding that any skills deficits are opportunities for building capacity.

### Expected outputs and outcomes from using the Skills and Roles Assessment Questionnaire

#### Outputs

- Completed questionnaires outlining skills and roles of various partners or members of the partnership.

#### Outcomes

- Increased recognition of the skills that different partners bring to the partnership.
- Understanding of the skills needed to make the research partnership a success.
- Awareness of areas in which capacity strengthening might be required.



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### Completed example of the Skills and Roles Assessment Questionnaire tool

Download the [Skills and Roles Assessment Questionnaire completed example](#).

The completed example shows scoring for a partnership involving three universities, one from a Globally Northern country (Australia) and two from middle income countries (Thailand and Kenya). The results of the completed assessment show that the Australian University intends to take on a major role in leading the partnership, writing grants proposals, and designing and authoring outputs of the research. This partner has all the necessary skills required to fulfil these roles.

**Under-utilisation of skills:** The Thai, and to a lesser extent the Kenyan university partners, also have considerable skills to contribute to research activities. These include grant writing and designing research, and yet, they play a limited role in these activities. This may be inequitable because participation in these academic tasks is often expected of authors of research outputs. On the other hand, the Australian partners' skills are underutilised for partnership activities that are time consuming, but get limited academic recognition, such as participant recruitment.

**Possible inequities:** Under-utilisation of the Globally Southern partners skills is one possible area of inequity. Another area of possible inequity is the major role that these universities play in project management, data collection and participant recruitment. These roles receive limited academic recognition and provide limited opportunities for career development.

**Roles and skills mismatches:** The Kenyan university is expected to play a considerable role in activities such as project management and student supervision, despite limited skills in this area. This indicates capacity building is required to ensure the Kenyan partner has the skills needed to fulfil their role. In the absence of capacity building, it would be inequitable to expect the partner to take on these roles. Taking on roles without adequate skills could be unreasonably challenging or time consuming, it could also negatively affect confidence and motivation of the partner.

### References and further reading for the Skills and Roles Assessment Questionnaire tool

This tool is adapted from the Partnering Roles and Skills Questionnaire in: Tennyson, Ros, 2011. The Partnering Toolbook. <https://thepartneringinitiative.org/wp-content/uploads/2014/08/Partnering-Toolbook-en-20113.pdf>