

# The Basics of Assessments

by James Macsaj

## What are the basics of assessments and how can an assessment process contribute to executive development and your organization's overall mission and success?

Do you know what makes a successful association executive? If you were hiring an executive or developing one in your organization, would you know the competencies one would likely need for success? Executive development and selection assessments offer a process to help.

### Why do Assessments?

An assessment process is a measured series of tests, simulations and experiences (structured and unstructured). To use the Jim Collins metaphor from *Good to Great*, selection assessments can help to get "the right people on the bus."

Development assessments play an integral role in nurturing executive talent. The underlying belief is that as individuals gain more insight into themselves, they become more conscious leaders and effective in leading individuals and/or teams and driving organization performance.

### Selection Assessments

Selection assessments provide an in-depth insight into an individual's key strengths, potential vulnerabilities and fit for a position in an organization. In hiring situations, candidates under consideration can be evaluated against current and future strategic needs. The hiring team learns more about whether the candidate has the skills, abilities and desired competencies required for achieving success in the designated position.


Management assessments help ensure that an organization is making the right decisions in placing or promoting people to address the challenges at the mid-level. Supervisory assessments are used primarily to ensure successful front-line business planning and execution. Such assessments also help determine how likely individual contributors are to make the leap to the supervisory level.

### Development Assessments

While some assessment processes measure skills, intelligence and ability, development assessments focus on an individual's mental models, feelings and schemas. Development assessments often include feedback from multiple sources (peer, boss, direct reports,

customer and others.). These are referred to as '360's' and are often administered online. A '360' means that the person being rated receives data (scaled ratings and open comments) from various perspectives.


A 360 assessment process often includes coaching and feedback for the individual



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### What is the Supervisory Skills Advancement Series?

The *Supervisory Skills Advancement Series* is the only statewide supervisory training program designed specifically for non-profit organizations. Each session is designed for the not-for-profit sector and the unique challenges you face with accountability to not only your Board, but also to your members, constituents and your image (brand) with the general public.

The *Supervisory Skills Advancement Series* will provide you with the tools to be an effective leader and supervisor. Upon completion of this program, you will be able to:

- Identify, define and develop plans to improve key competencies for both you and those you supervise.
- Clearly understand the legal environment.
- Identify the two main types of behavior that drive a culture and the success of an organization.
- Apply coaching and guidance techniques to improve employee behavior and bring conflicts and disagreements to a positive solution.
- Build an integrated work force with the flexibility to respond to your organization's changing environment.
- Master the behaviors that are crucial strategy for business and its continued health.

### Who Should Attend?

- New managers
- Seasoned managers who want to improve their supervisory skills
- Those with aspirations to be promoted to a management position

### How does the Training Work?

The course will be offered in East Lansing and the Detroit area. The program is designed to cover the core topics over five three-hour sessions. Each session will be offered twice in each location to accommodate varying schedules. Readings and course work will be required before and after each session. We will use the most recent materials from leading business publications.

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## HUMAN RESOURCES

or team. The purpose of the feedback is to assist each individual in understanding his or her strengths and to contribute insights into aspects of his or her work needing professional development.

In most assessments, the results are confidential to the person being assessed, his/her managing director, supervisor and relevant consultants who assist with development planning. Research on 360s indicates that people tend not to give honest critical feedback unless their anonymity is guaranteed. A problem surfaces when a client perceives a 'not acceptable' person tallying the results because the anonymity and reliability that characterizes useful feedback is then broken.

### Making it Happen

An assessment process (selection or development) is first designed and developed within the organization – often led by a business unit leader, human resources executive or organization consulting team. External consultants/advisors are called upon to design, develop and deliver the process. The aim of the process is to test for competencies (cluster of skills or behaviors needed for success in a position within the organization). Some common competencies include building trust, customer orientation, excellence, strategic thinking and implementation.

The actual assessment usually happens at an off-site location. The participant completes a series of instruments and exercises, usually over one or two days, that provides feedback and data about how they are demonstrating the desired competencies.

Ability testing is conducted to assess a person's critical thinking skills. It can also measure a candidate's ability to reason with numerical information (as is needed for financial responsibilities) or for abstract reasoning as is needed to think broadly in terms of strategy. Personality inventories are often deployed to assess a person's style, motivation or preferences. Of course, both ability and personality assessment augment background and behavioral interviews to assess experience and competence.

Candidates may also engage in a series of role-plays or simulations in which their behaviors are observed. For example, the candidate may have a 'boss meeting' with a

subordinate – or they may be in a task force situation where they need to show how they build relationships with peers and lead the team to results.

In development assessments, these exercises are often debriefed afterward in a feedback or coaching session. For example, if a management-consulting firm does assessments for executive development and selection, their process likely includes a lead assessor who oversees and synthesizes information coming from the assessment exercises. The lead assessor debriefs the results with the candidate and supports them to make meaning of the information. They also jointly identify strength and growth

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areas for the candidate and set up a personal learning plan.

Andor H. Reiber PhD., vice president of organizational consulting services for Right Management Great Lakes regional office, notes that assessments can take the guesswork out of understanding what makes an executive stronger or relatively ineffective. Assessments also significantly enhance confidence in making human resource decisions such as hiring a new executive or promoting someone to a much broader role.

### Possible Pitfalls

Given the range of assessment tools and services available to any organization, it is important to make sure that the tools and instruments have sufficient empirically established *reliability* and *validity*.

Validity and reliability give uniform tests their power from their standardization process. The tools also need to have a well-selected sample of people who provide data through answering questions, performing tasks, etc. in response to a stimulus presented in reasonably uniform conditions.

Assessment processes are also prone to the human factor. Respondents may show up for an assessment session without being adequately prepared. Or, they may have been up late the night before and not feeling very alert. They might also be distracted by

other personal issues they are facing. Professionals conducting the assessment must be alert to these situational factors and how they can threaten the assessment's validity and reliability.

Assessors can also fall prey to these same situational factors. They may also threaten the objectivity of the assessment process through lack of competence or through unconscious projection of their own values and attitudes when observing and evaluating candidates.

Stephanie Morris, president of the Michigan Association of Industrial/Organizational Psychologists, advises linking assessment processes to organization strategy. "In considering the reliability of a particular assessment tool, also consider the impact of multiple assessments to align with company strategies and goals," she says. "Often, more robust assessment processes achieve greater reliability and validity.

**Benefits and Considerations**

If done well with a professional and qualified staff, selection assessments help ensure

that the right people (right skills, styles and behaviors) 'get on the bus.' Development assessments provide an opportunity for individuals to take an active role in their development.

William Neal, M.A., founding partner of Denison Consulting, shares the following advice: "The value of an individual assessment and organizational assessment identifies three critical 'whats.' The first 'what' involves the research background of the assessment tool and includes the research foundation and theoretical model from which the tool was developed. This 'what' provides a common language for discussing the issues and the business.

"The second 'what' involves the 'so what,' which is the research link of the assessment results to individual and organizational performance. If there isn't a link to business or organizational performance, why would one do the assessment in the first place?

"The third 'what' involves the 'now what.' The 'now what' involves identifying where the individual or organization should focus to leverage and achieve the

best results and performance improvement. The 'now what' allows the individual and organization to track progress over time." **AN**

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Hear more from James Macsary at ORGPRO 2006 by attending this session: Leadership 360 Tuesday, June 27; 10:00 - 11:30 a.m. To learn more about ORGPRO see page 26 or visit [www.orgpro.info](http://www.orgpro.info).



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