Reality in assessment centre design

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Key learning points

- **What it is that you have to design.**
- **What information you will need to action your design.**
- **What the constraints are.**

Starting off

You have been asked to design an assessment centre. In front of you is a blank screen. Where do you start? What has to be designed? Why is it wanted? The questions well up and, without control, one of two things may happen – you move into 'overwhelm' mode or you leap blindly forward. No, you really should do neither. You are in control. You should sit back and think. This article will help you with this straightforward yet exciting process. At the end, you will not have all the answers, but you will have some that will help you.

Throughout this article we shall refer to the person being assessed as the participant.

What will you have to design?

When working with companies, we notice that they focus on the design of exercises, basing that on good ideas or some exercise they have experienced

themselves, and often neglect other elements. So, let us review the assessment centre elements that have to be designed.

- **Exercises.** These are the core. Materials may include the participants' brief, the resource brief and information, the assessors' report form, the resource and participant report forms, and the facilitator's brief. A resource may be a role-player, an interviewer, an information supplier or the facilitator of a business situation.

- **Scheduling the assessment centre.** The participants need time to get ready, to do the exercise and to prepare information afterwards. The assessors need time to complete the assessment process. All this needs to be carefully designed so that participants are kept busy. And everyone has to be fed!

- **Publicity and manager briefing.** Managers need information before the event, so they know what it is about.

- **Participant briefing.** Participants need a written briefing that is included in their joining instructions, and an oral briefing when they arrive at the assessment centre.

- **Process to integrate information.** A facilitated assessor discussion should be included – often called a 'wash-up' discussion.

- **Report structure and production process.** Define the client's preferred style and structure for a report (for example, you can put your conclusions at the start, or at the end). What is the process for producing the report?

- **Structure of feedback to participants.** It is important that assessors drawn from the company have a common approach to ensuring that participants are treated as adults, own the information they are given and are able to handle objections and advice; and that any decision the participant makes will be supported.

- **Assessor, facilitator, administrator and resource training.** Each of the roles in an assessment centre requires the application of skills. The acquisition and application of the skills requires training. There are two levels: the transferable skills that would apply to any assessment centre, and skills that relate to the context of a particular assessment centre.

Key design points

- Design an oral and written brief for the participants.
- Split the briefing up into easy-to-understand elements, so that participants know what to do and what situation they are in.
- Create a situation that restricts the participants to the information given.
- Make it real for participants, but don't give them too much information – only enough to prepare. The real activity is in the exercise.
- Put yourself in the situation, thinking it through from the participants' point of view.

The resource and materials

In assessment centres the term 'resource' refers to role-players, people with information in fact-find exercises and those running business simulations. Two main things need to be designed for resources:

1. How the exercise will be run.
2. The information needed to run it.

Let's look at two typical exercises.

The in-tray

This contains a wide range of documents that the participant will work through. Each item will be designed so that it is part of a theme of information that provides the basis for analysis, enabling the participant to decide on a course of action. The items in the in-tray are normally in date order.

Some items will require little more than a signature; others may require some calculation. Some may be related to others and responding to them will be time consuming. All items may either have priority or be put in a low-priority pile. What the participant tackles and how they tackle it will be assessed.

In any event, the design will be such that important and urgent items can be handled in the time allotted

and some important, but not urgent, items may also be handled. Clearly, items that are not important should not be tackled.

The role simulation

The role-player will need an extensive and in-depth brief. The core of this will be the information that the participant may need to extract and the information that the role-player will use to play the role credibly in the context given. The two key things in the role-player's brief are as follows:

1. Information about the person they are playing and what they know and can tell.
2. How they are required to behave. This will be guided by the behaviours expected of the participant and the behaviours suggested for the role-player.

Summary checklist

- Do all the contributors to the assessment centre know what is going on?
- Do the resource and participants have the information they need, in a form that can be used?
- Would a person in the job recognise the exercises as plausible?
- Are the exercises fair on a participant from the target population?
- Is there a range of different types of exercise?
- Do the exercises give opportunities to assess the criteria?
- Do the exercises discriminate between those who have a behavioural repertoire and those who do not?
- Does the assessor have clear, behaviourally-defined criteria?

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Design background

It is essential to specify the **purpose** and **constraints** before design work starts. What exactly is the assessment centre for? Is it for selection, identification of potential or for development? Constraints may include the following:

- cost
- length of time available
- items that can or cannot be used (for example, psychometrics)
- people available with skills in role-playing, assessing and facilitating
- subject matter experts to provide information.

It is extremely frustrating to spend considerable time and money designing, then to have constraints introduced.

It is essential to specify the **entry level** and the **target level**. These should be the starting point for your design. Sometimes we have met a situation where a manager has ignored the specified entry-level requirement and a particular participant has been out of their depth in the first exercise. This is not only an expensive waste of an opportunity but, more importantly, it is damaging to the participant.

Design constraints

There are other design constraints. The participant : assessor ratio is normally 2:1. So twelve participants mean six assessors. Normally, we would expect each assessment criterion – such as competency – to be observed at least three times, in three different situations, by three different assessors. Assessors are human and the key aspects of a role are limited, so we would expect to assess only six to eight criteria in total, with six or fewer in any exercise. These operating criteria will determine the number of exercises.

More criteria will generate more exercises, more complexity, more time and more cost, and this applies equally to other constraints. An exercise that will not give the opportunity to observe a criterion will generate the requirement for another exercise.

Information and you

By now you may be wondering where all the necessary information comes from. We have three sources: **the organisation**, **key job information** and **applied imagination**. (That's right – applied imagination.)

- **The organisation** has a culture; what is it like here – how are things done? That culture needs to be reflected at the assessment centre. For example, are e-mails cold, clinical statements or are they warm and friendly? Real forms will be used – are these examples of turgid bureaucracy or simply informative? Any documentation will be in the format and tone of the organisation. Are people micro-managed or empowered? What is the culture that the centre must reflect?

Tip – Make it feel right!

- **Key job information** is the specification in detail of the target job, role and level. This calls for a role profile, drawn up in terms of behavioural requirements, accountabilities and typical and critical situations faced by people in the job or role. From these, the criteria are derived. Through exploring 'critical instances' and studying an account of 'a day in my life', appropriate limitations for the target job or role can be envisioned. We can then imagine situations faced by an effective or superior performer in the job, and also the behaviours they will be displaying. The Internet can be a good source of information. One

recent simulation required the role-player to represent an illegal immigrant. The Internet provided history, names and political parties that were relevant to the scenario.

Tip – Get the facts right!

- **Applied imagination** enables us to visualise the overall situation, the boundaries and the required content of the exercises – being able to imagine ourselves in the participant's position and as, say, a role-player. Feeling what they may feel, asking what they may ask, you can supply a variety of answers that might be given. You can identify the holes in the information and the approaches that must be covered. Then you can explore, for example, how the role-player might behave (are they cowed, aggressive, dim, sharp?) and select the behaviour set that matches the situation. The key to design is the ability to put yourself in the position of the participant, the role-player and the facilitator.

Tip – Match reality!

Exercise options

Numerous options are available for exercises. The ones designed for assessment centres will have certain characteristics:

- They will directly relate to the situation that the participant is in or aspires to. If a key part of the target role is to write sensitive letters using a PC, then that may be the basis of an exercise and a PC needs to be provided.
- The exercise must enable the observation of the behaviours required.

Sometimes clients specify that a particular exercise must be carried out, even though in practice it does not occur often in a working
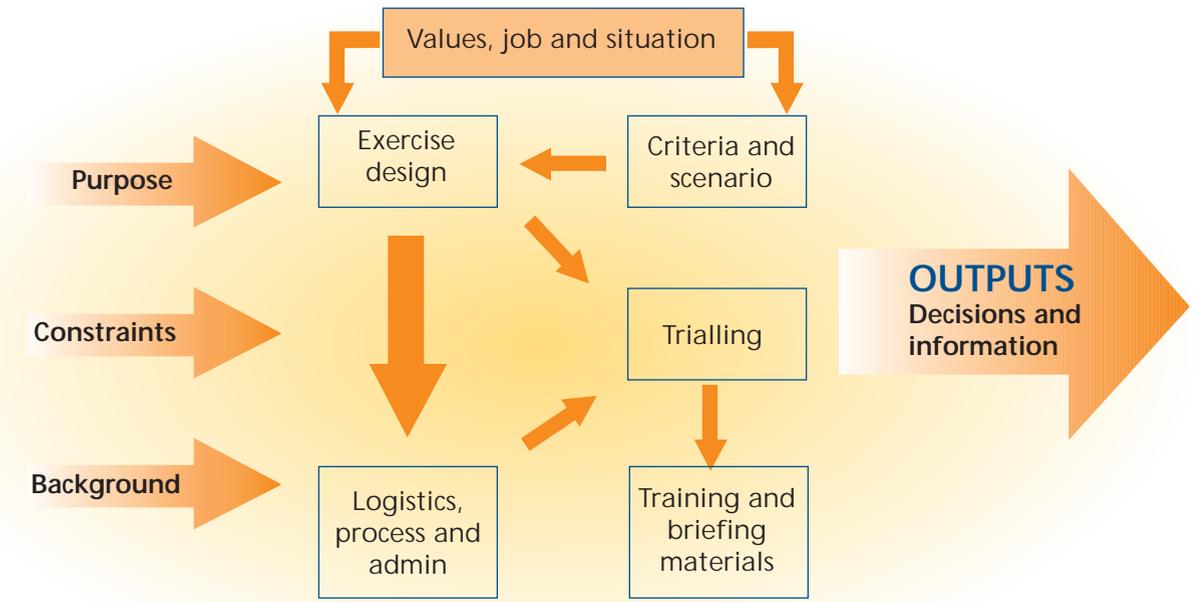

Fig. 1: Assessment centre design

situation. One example is a group exercise. To reproduce the form and structure that occur in the company in reality is difficult, expensive and often unlikely to yield the observation opportunities expected.

To emphasise the importance of reality, we never require participants to act. They are always themselves, using their own name. They are in an artificial environment that replicates reality. They may be required to do something which is a requirement of the target role but which they have not done before. An example is dealing with a sensitive issue such as coping with somebody with halitosis. They are not asked to pretend anything. They are asked to deal with the situation.

Why are we emphasising the match of the exercise to reality? Historically, this has not been common practice. In fact, some suppliers offer a series of exercises that are not related to the company or to each other. What

happens now is a matter of evolution. As assessment centre technology has matured and progressed, face validity and content validity have been recognised as important. They are related to participant performance. Performance against the criteria leads to high predictive validity. The face- and content-validity effect is not only applicable to the participants, but also to the assessors. This idea is, of course, not new. Selection by making people do part of the job probably predates structured interviews.

Sound exercise design requires a number of elements:

The participant needs a **brief** that includes what is expected of them. What will the participant need to know?

- Give the purpose of the exercise. For example: 'To explore how you gather information from a client in order to make a business decision'.

- The situation description must give enough information, so that the participant does not start inventing things. For example, it may say that they are standing in for a manager of another department. Consequently, the participant is restricted to the information given.

- It may describe what is happening in the organisation. The participant will then have the information they need to prioritise.

- It is useful in some exercises to indicate what is expected of the participant. For example, 'You have 30 minutes to prepare for the meeting. Decide how you want to approach it'.

- It is also useful to give the participant some personal guidelines. For example, 'Be yourself. Do what you would do as a competent professional faced with this situation'.