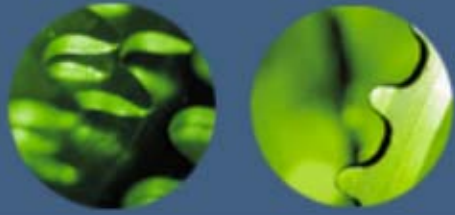




Success Strategies for Designing and Administering Assessment Center Processes

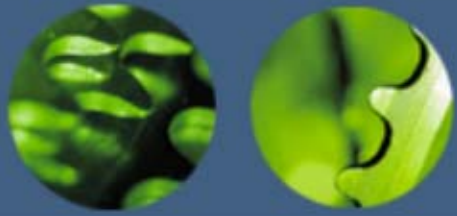
**Presented at the 32nd
International Congress on
Assessment Center Methods
Las Vegas, NV
October 5-8, 2004**

**Linsey C. Willis, D.P.A., SPHR
L.J. Craig & Associates, Inc.
Patrick Maher, Dr. Sci. Crim
P.O.D.C., Inc.**



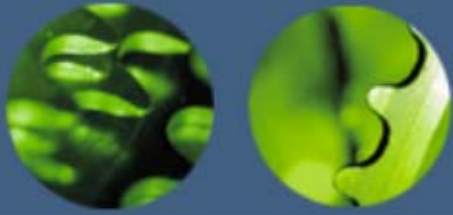
Introduction and Overview

- **Based on case study of municipal Police and Fire Department contract**
- **Located in southeastern U.S. in a city of over 100,000 residents**
- **Unusual contract situation**
- **Job Analysis**
- **Fire and HR staff issues**
- **Communication, follow-up and documentation**
- **Power and control issues**
- **Union issues**
- **Strategies and refinement of to ensure success**



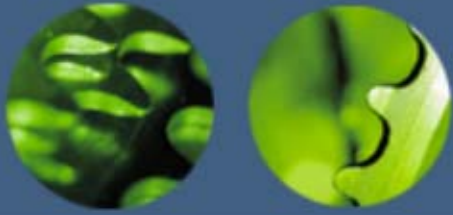
Department Background Information

- **162 employees**
- **151 are certified firefighters**
- **107 are certified paramedics**
- **Eleven front-line vehicles respond to fire and EMS emergencies**
- **Organized into five divisions: Administration, Fire and Life Safety; Logistics and Support; Operations; and Patient Transport**



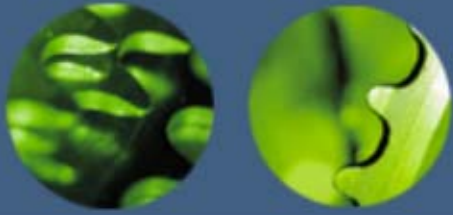
Agenda

- **Brief historical overview**
- **Bid process issues and strategies**
- **The key “Players”**
- **Past vendor issues**
- **Job analysis or lack thereof**
- **Major organizational change with this project**
- **Development strategies**
- **Summary of initial success strategies**
- **Mid development strategies**
- **Implementation and administration strategies**
- **Project completion strategies and results**
- **Summary and recommendations**



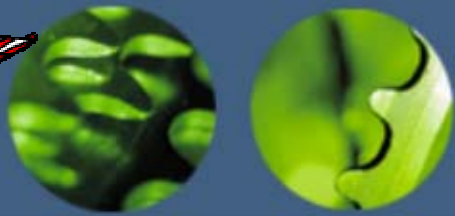
Historical Overview

- **City had used same vendor for past several years**
- **Never bid out**
- **Set price**
- **Strict requirements for:**
 - design and administration
 - assessor training
 - start and end times
- **Wealthy city but severely under funded project**
- **Previous HR Personnel Assistant handled all testing and promotional testing**



History (cont'd)

- **Previously bid, but unsuccessful due to fees**
- **Change in HR staff and long term employee retired**
- **Project sent out on internet for bidding**
- **Bid on project**
- **Price set extremely low and noted specs**
- **Selected to complete work**
- **But had to further negotiate cost and other**

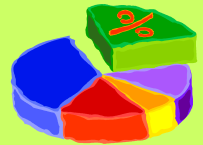


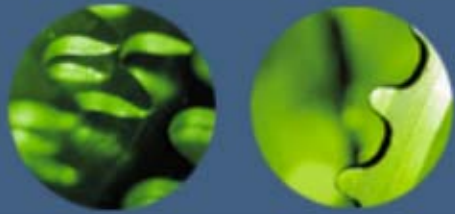
Bid Process Issues & Strategies

- Sent out nationwide
- Made formal presentation
- Very rigorous meeting
- Several staff from both departments
- Added more tasks not in original bid spec
- Wanted work done for no additional \$
- Cease negotiations



- Negotiated; weighed all options
- Added cost of feedback reports
- Cut price back
- Cease negotiations?
- Continued to negotiate
- Stringent requirements for room numbers and staff, start and end times for Fire Department

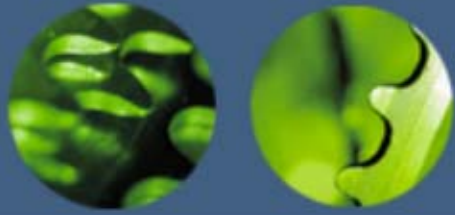




Bid Process Issues & Strategies

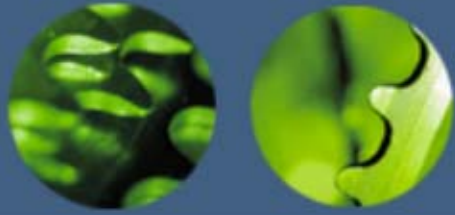
- Rewrote contract
- Delayed process a few weeks but no break given
- Not given extra time to make up delays
- At last minute Fire Chief added written text
- Would not fund price submitted
- Did not care that it was not in bid specs
- Cease negotiations?
- Negotiated very low price for written test
- No real choice
- Cease negotiations?





Bid Process Issues & Strategies

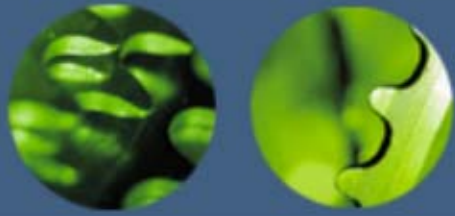
- **Pushed competitive negotiator (the City HR Director) to accommodate interests**
 - **Consultant a prosocial negotiator and attempted to initiate cooperation**
 - **Treated competitive negotiator as:**
 - an individualist
 - and with more respect than given
- **Examples of this:**
 - Pushed hard to get what we wanted in return for making concessions
 - Did not join HR Director's strategy (e.g., will pay for reports but at lower price)
 - Made proposal for all to revise contract incorporating all issues
 - Revised by Purchasing Department
 - **Efforts were rewarded.**



More Strategies for Successful Negotiations

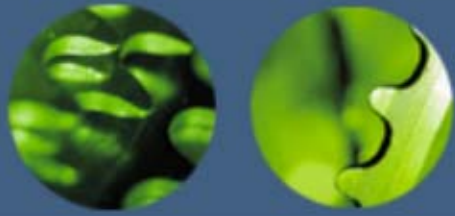
- **Don't lose first time client**
- **Start to raise the bar**
- **Lack of knowledge**
- **Be diplomatic**
- **Figure lowest price without losing \$**
- **Educate them**
- **BATNA (Best Alternative Negotiated Agreement)**

- **Appease Fire Department**
- **Please HR department**
- **Be aware of internal politics**
- **Accommodate both**
- **Be cautious of powerful and contentious union**
- **Work out "Win Win" for all**



The Key “Players”

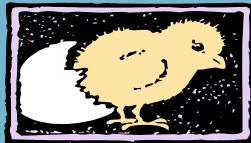




The Key “Players”

- **Assistant Fire Chief (AC)**
(key liaison):

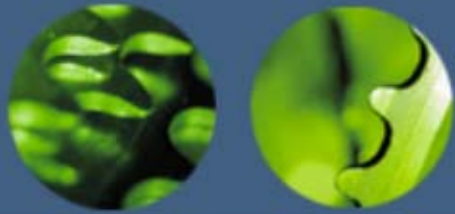
- We've always done it this way
- Happy with other vendor
- Not happy with HR
- Control and power oriented
- Sarcastic; “Chicken Little”



- Close to retirement

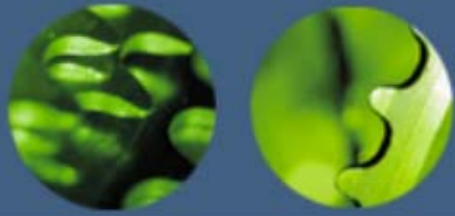
- **Deputy Chief (DC):**

- Positive & congenial
- Happy for change
- Has issues with way other process done
- Subtle disagreement between Chiefs
- Very sharp and dedicated
- **Fire Chief:**
 - hands off
 - close to retirement but



The Key “Players”

- **Battalion Chiefs (BCs) and/or SMEs:**
 - We've always done it this way; but smart and knowledgeable
 - Happy with other vendor
 - Not happy with HR; voiced in meetings
 - Control and power oriented
 - Strong union mentalities
- Little advance planning or knowledge of process
- Difficult and challenging in SME meetings
- One close to retirement
- Never did JA before and did not want to
- Issue of time constraints

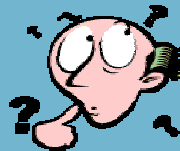


The Key “Players”



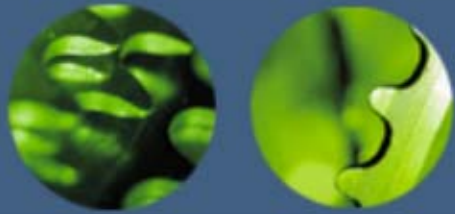
- **Human Resources Director:**

- Admits lacking knowledge of methodology but:
 - Micro-manager
- Eager to learn
- Wants everything for nothing
- Can you trust?



- Highly energetic
- Highly political; wants job to retire in
- Sticking neck out by changing vendors
- Very vocal and opinionated
- Challenging
- Educated and credentialed
- Inconsistent





The Key “Players”

- **Assistant Director:**

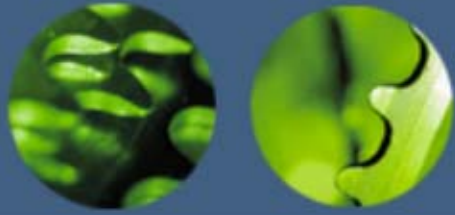
- Listener
- Disturbance handler
- Laid back
- Very supportive
- Will provide some assistance and back up
- SPHR credentialed
- Years of experience in HR and union negotiations and other issues

- **HR Analyst:**

- Been there done that
- Highly technical
- Knows business
- Real troubleshooter and supporter

- **HR Assistant:**

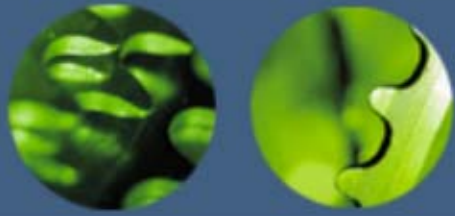
- Pleasant; eager to help
- Lacking total information
- Accommodating
- Goes with flow
- But wants same process
- Lacks credentials
- Wants recognition



Past Vendor Issues

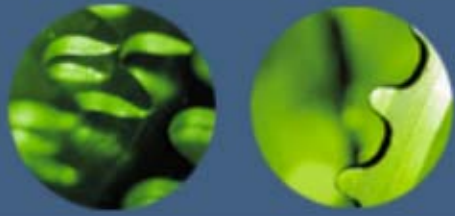
- **Has much of market in area**
- **Low bid; set price**
- **Off-the-shelf or recycled materials**
- **No past JA or validation report**
- **Does not follow guidelines**
- **Strong relationship with AC based on his comments**
- **Concern with feeding candidates and assessors**

- **Out by 5 PM**
- **Last process resulted in major problems**
- **Problems with written reports and scoring**
- **No paper trail**
- **As little work as possible**
- **All of above per HR and general knowledge**



Job Analysis Or Lack Thereof

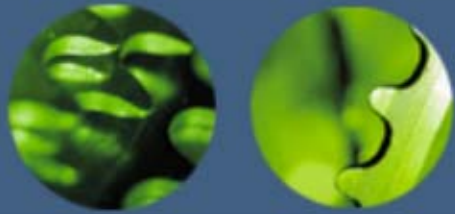
- **No JA ever done but now required by presenters**
- **Department did not want to do but had to**
- **Last process questioned – no documentation**
- **Disagreement amongst SMEs**
- **JA and validation report added into contract for no additional \$**
- **Walk away?**
- **Strategies to deal with →**



Strategies for Job Analysis

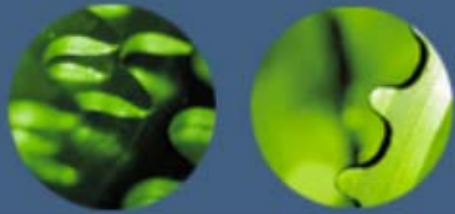
- Project plan
 - Update meetings
 - Explained rationale and purpose
 - Used as mini training session for all
 - Accommodated BC who was the most difficult:
 - “ride alongs”
 - ate lunch with him
 - listened to him vent and complain
 - “Overkill” on process to ensure success
- Kept HR in loop
 - Invited HR Assistant along
 - Regular meetings with HR Director
 - Pulled in HR Analyst as backup and witness
 - His idea also
 - Very savvy
 - Documentation!!!!
 - Continual reinforcement and acknowledgement of SMEs hard work





Sections Of Project Plan

<u>PROJECT TASK</u>	<u>STAFF</u>	<u>TASKS</u>	<u># HRS</u>	<u>MTG DATE</u>	<u>TEST MAT DUE DATE</u>	<u>FINAL DUE DATE</u>	<u>TEST DATE</u>
Planning meeting	Linsey, Monica		3-4	7/22/2003			
(Review processes, obtain books, Job Description, do scheduling etc.)	Fire and HR staff						
Review JA material	Linsey, Monica						
Job Analysis SME Mtgs	Linsey, Monica						
(Battalion & District Chief)							
Finish Job Analysis	Monica	report					
	Linsey	data					



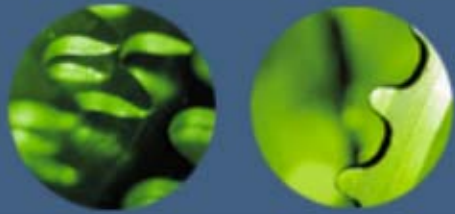
Major Organizational Change With This Process

- Strategies:

- Each person got copy
- Meetings each week and separate meetings with AC
- Listened, listened, listened
- Kept notes
- Planned for how to handle, if continued

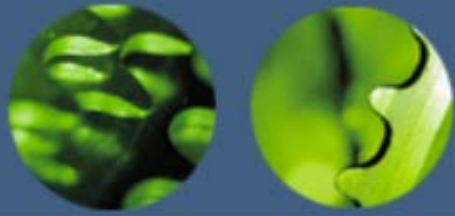


- Continued to try to obtain SMEs and AC's support due to;
 - his negative and condescending remarks,
 - threats of lawsuits and challenges
- Per what AC said he had already been told by many union members





Development Strategies

- **Again, a detailed project plan that was updated**
- **Establish clear lines of authority and accountability**
- **Used more sub-contractors to assist (at cost to consultant) for extra backup**
- **“Overkill” on all aspects of work e.g.,**
 - check and recheck,
 - edit and re-edit etc.
- **Kept all players and consultants fully informed of each activity**



Summary of Initial Success Strategies

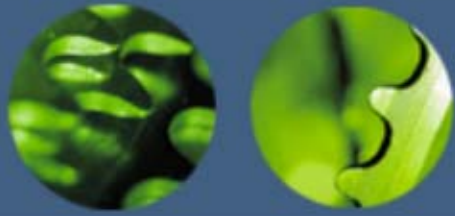
- Constant communication 
- Held weekly meetings with HR Director and her staff (after problems continued)
- Remained in accommodative state 
- Listened and observed
- Wrote letter terminating contract

- Started documentation process (for defense)
- Tried to remain positive
- Kept voicing, “they are the client” and they own the process
- Consulted with Dr. Maher
- Reviewed contract and consulted an attorney
- Continued to teach



Mid Development Strategies

- Shared information about lack of cooperation with HR Director; provided specific examples
- Continued to share information with HR Director who did not take verbal reports seriously
- HR Analyst fully aware of issues and supportive
- Asked for assistance with AC
- Asked for joint meeting
- No support; HR Director took AC's side
- Wrote contract termination letter
- Told HR Analyst of plans to terminate contract
- No action
- Met with attorney; revised letter; submitted



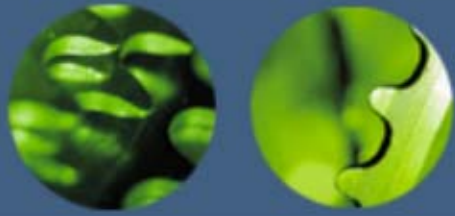
Mid Development Strategies (con'td)

- Meeting with HR Director and Fire Chief (upon their request)
- Requirements identified in letter and meeting
- AC off project
- Police contract not affected
- HR not interested in copy of written documentation
 - Sunshine law
 - Politics
- Re-reviewed issues:
 - Sabotage
 - Subtle negative innuendos
 - Comments about our competency to do project
 - Constant reference to union challenges
 - Specific remarks; e.g.,
 - “You are not competent to do the work”
 - “You are not qualified to do work in the Fire Service. We did not want your firm hired”



Mid Development Strategies (con'td)

- **Review meetings with SMEs;**
 - brought HR Analyst in as witness
 - support person
- **Long distance phone calls with Dr. Maher at convenient times to BCs to review Tactical exercise**
- **More feedback to HR Director and staff**
- **Reviewed schedules**



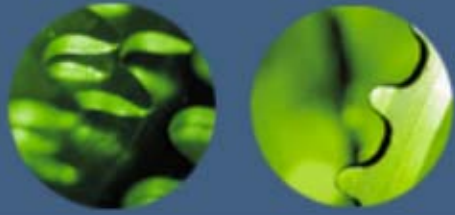
Implementation And Administration Strategies

- **Validation report completed in advance**
 - Reviewed in face-to-face meetings
 - Emphasized importance of
- **Reiterated concerns several times e.g.,**
 - tri-ethnic panels
 - equipment issues,
 - time needed for meetings
- **Meetings held with as many as possible**



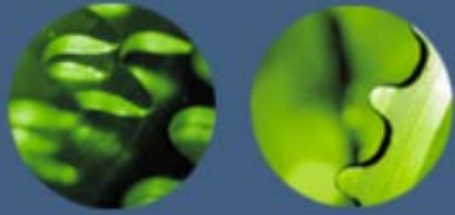
- **Reviewed, edited and reviewed schedules several times**
- **DC and key BC SME brought into project**
- **Worked closely with them**
- **Regular meetings and phone conversations**
- **Follow-up, follow-up, follow-up**





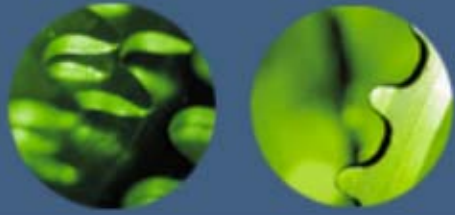
Implementation And Administration Strategies

- **Updated project plan**
 - **Got copies of all letters sent to assessors**
 - **Checked on ethnic and gender composition**
 - **Provided minimum amount of training**
- **Room layout and set up**
 - **To ensure sufficient training:**
 - **Exercise specialization**
 - **One-on-one training in separate room**
 - **Administrators present at all times with each assessor team**



Implementation And Administration Strategies

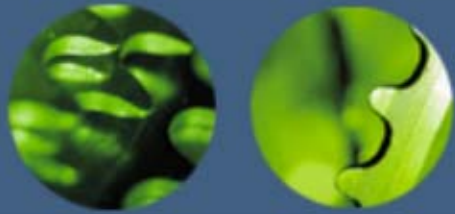
- **Constant “care and feeding” of the assessors**
- **Extra staff on site during training for questions and to provide care and feeding of the assessors**
- **Spent extra time on tactical simulation exercise**
- **Encouraged HR staff to attend training for:**
 - their development
 - to head off expected problems based on previous feedback
 - to maintain their on-going support



Scheduling

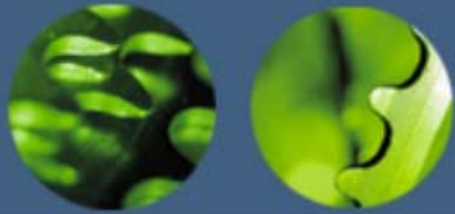


- Each administrator assigned to a different room and exercise all day
- Test monitors in hallway all day (consultant's staff)
- Overly specific:
 - Candidate # and very detailed candidate schedules
 - Prep start and end times
 - Exercise start and end times
 - Room number and name
 - Administrator name on door
 - Assessors assigned to room at time
 - HR observer and title
 - Facility map even though lay out is very easy
- Candidates escorted to and from rooms all day even if room next door
- All administrators had a stop watch

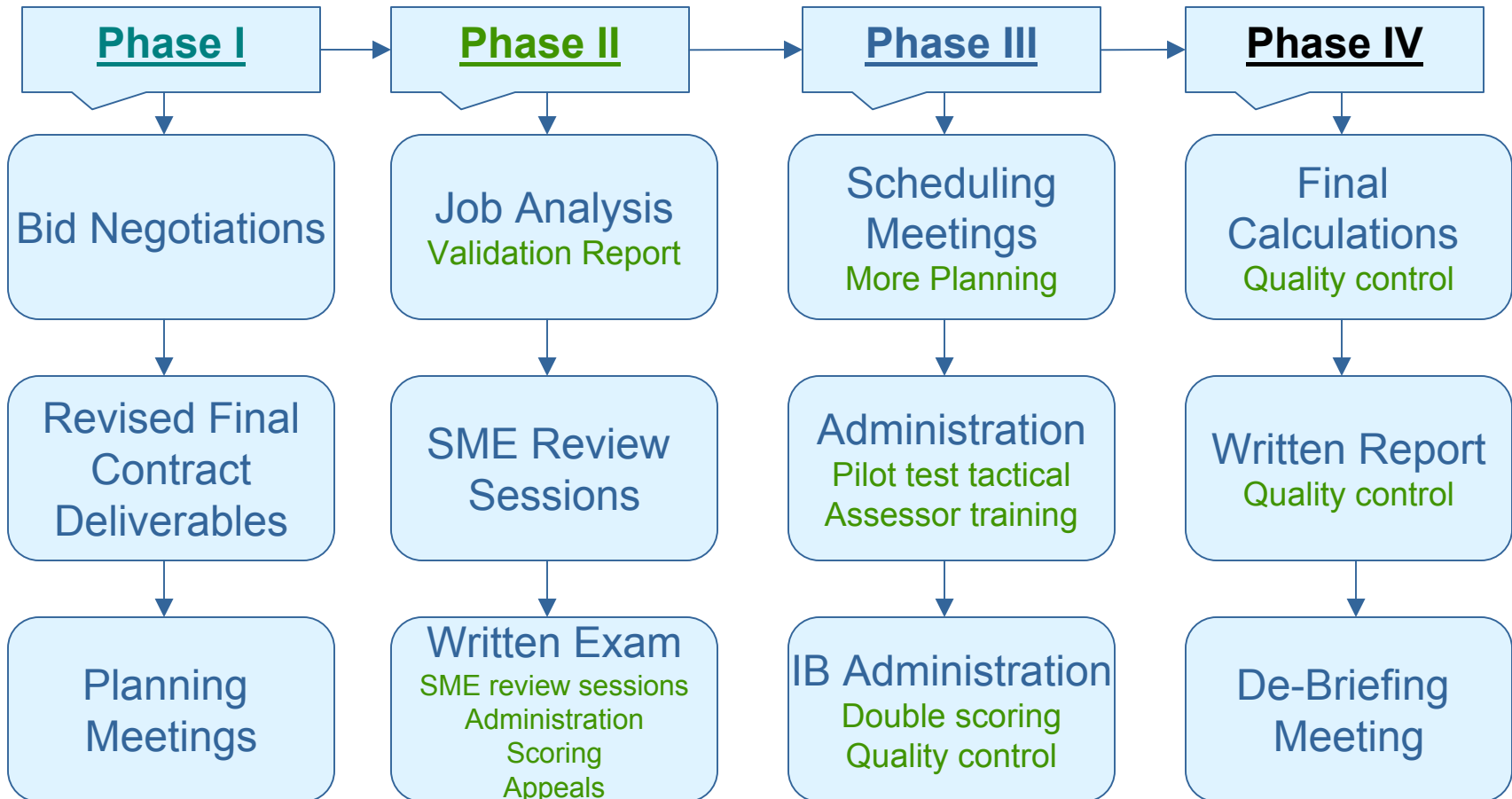


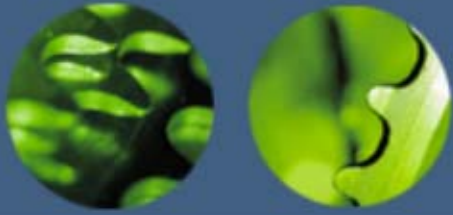
Implementation And Administration Strategies

- Was open and conciliatory to union staff who showed up unannounced to observe administration
- Continued education process of all whenever necessary
- Used extra staff to administer
- On site extra early to head off problems
- Consulted with union reps after process when they approached us with + feedback
- Remained cordial to HR Director when queried about:
 - length of assessor training
 - schedule and timing
 - what time process would end



Testing Project Flow Chart





Project Completion Strategies & Results

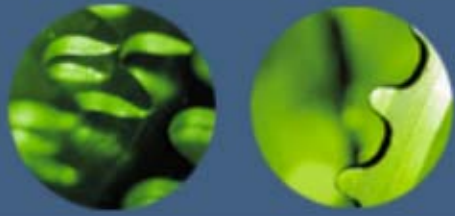
- Overall, make sure all ducks are in a straight row



- Met with HR staff after completion for de-briefing and to present written reports



- Accept financial loss as part of doing business and acquiring a new client
- Accept learning curve:
 - The care and coddling of difficult clients
 - Forget about a profit
 - Politics



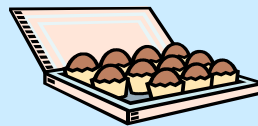
Project Completion Strategies and Results

- Rewarded one sub-contractor with end of year bonus and extra compensation for another project



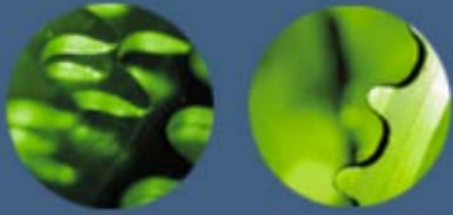
- She had worked many hours beyond what her contract called for

- Thank you letter and chocolate for all HR staff



- Thank you notes and chocolate to DC and BC





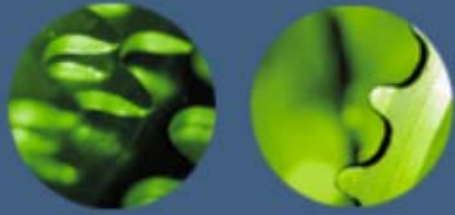
Project Completion Strategies and Results

- **Consultants graded IBs:**

- **Fire Department refused to do:**
 - Not specified in bid specs that consultant would score
 - But could not negotiate fee to do
 - Double scored IB's
 - Three consultants worked on IB reports

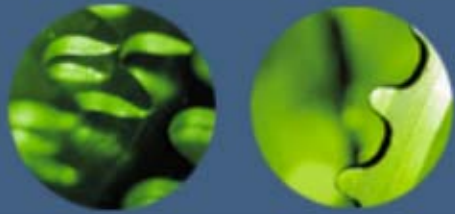
- **Triple checked written reports**

- Provided as much detail as possible
- 1 page single space typed report with quotes etc.
- each exercise covered



Project Completion Strategies and Results

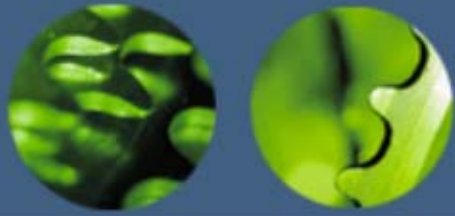
- **Final data set:**
 - **After contract set HR department requested:**
 - very specific details without divulging proprietary information
 - training on how scores calculated
 - written documentation of this
 - **Sent spreadsheets with separate explanation but not proprietary score calculation sheet**
 - **Met with HR staff to review final reports and submit**



Summary And Recommendations

- Don't bid on projects that indicate a set price in bid specs
 - Trust early gut feelings; if something does not smell right it isn't
 - Get out of contract before commencing work if need be
 - Rewrite contract requirements
- Continue the contract if some concessions are made on client's end
 - But don't make too many concessions
 - Adaptability
 - Don't compromise ethical principles despite financial loss
 - Be able to juggle





Summary And Recommendations

- **Get rid of problem SMEs early on if at all possible**
- **Hold your position!**
- **Persevere**
- **Raise quality and integrity of process**
- **Bite your tongue**

- **Under promise and over deliver**
- **Remember, the client owns the process**
- **Maintain your integrity and reputation**
- **Know when to walk away!!!**



THE END

