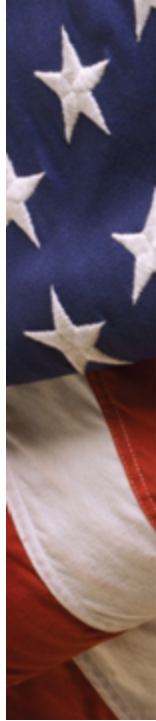**Working Together: Sharing Assessment Practices in the HR Community**

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Good afternoon. Thank you for joining us for this webinar titled, "Working Together: Sharing Assessment Practices in the HR Community." My name is Juli and I'm joined by Chelsey, Natasha, and Leigha. We are from the Classification and Assessment Policy group here at the Office of Personnel Management (OPM). We are really excited to share with you what you have shared with us!

Just a little bit of housekeeping before we get started. If you have any questions, please feel free to type it in the "questions" box at the right of your screen. We will try to answer them in this session. However, if we don't get to it, please send your question to the Assessment Information email box (Assessment_Information@opm.gov) and we will respond accordingly. You'll have the opportunity to download the slides at the end of this presentation. Also, we're going to make this webinar as interactive as possible by polling you and learning about your experiences.

Background

- Changes from Hiring Reform
- Survey used to collect best practices from the HR community
  - Six open-ended questions
  - Twenty-eight responses
  - Agencies varied in size and location
 - Pulled out unique or common practices from responses received

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It's been about two years since the Hiring Reform Initiative was implemented. Certainly that's brought changes in how we assess and select in the Federal Government. We conducted a survey to see how the HR community has adapted to these changes.

For those who participated, we really appreciate your comments. For those who did not have a chance to participate, I just want to share a little bit more information about the survey. We asked six open-ended questions and received close to thirty responses. We had a variety of agencies respond; from large agencies (like Department of Defense) to small agencies, and from local agencies here in DC to agencies located in Alaska.

We pulled out unique practices (in other words, those ideas that were "out of the box"). We also pulled out common practices to inform you what agencies are doing in response to various issues.
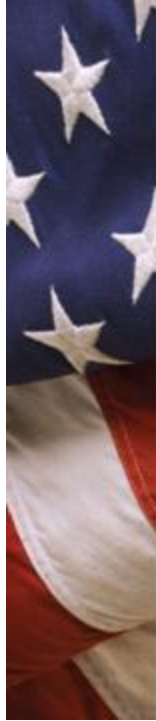
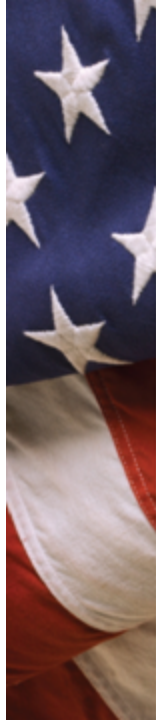The first question on the survey was, "What are your agency's largest concerns in selecting the best person for the job? How are you overcoming these challenges?"

Audience Poll

✓ What are your agency's largest concerns in selecting the best person for the job?
- Person/Job Fit
- Lack of highly qualified candidates
- Too many applicants
- Developing good assessments

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Let's pause for an audience poll. What are your agency's largest concerns in selecting the best person for the job?

- Person/job fit
- Lack of highly qualified candidates
- Too many applicants
- Developing good assessments

What are your agency's largest concerns in selecting the best person for the job?

☐ Person/Job Fit	21.43%	(9)
☐ Lack of highly qualified candidates	14.29%	(6)
☐ Too many applicants	14.29%	(6)
☐ Developing good assessments	57.14%	(24)

It looks like most agencies are concerned about developing a good assessment (57%), followed by person/job fit (21%), and other agencies are concerned about a lack of highly qualified candidates (14%) and having too many applicants (14%).

Challenge: Finding The Perfect Match

- Person/Job Fit
  - "The individual truly has the skills required to perform the duties"
  - "Ensuring a good fit with the culture, values and type of work…"
  - "That the agency receives a qualified candidate in order to save the organization time and money."
- ✓ Concern about fit in terms of skills and values
- ✓ Cost of a bad hire

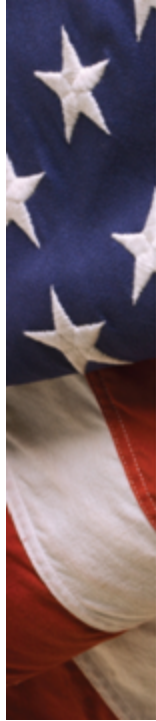UNITED STATES OFFICE OF PERSONNEL MANAGEMENT   6

Challenge: Finding the Perfect Match.

We heard about this concern from agencies on two different levels; the first level was that agencies were concerned about finding a candidate that has the right technical skill set for the job, and the second level was finding a match by way of fitting into the organization's culture/values.

Agencies shared the following regarding person/job fit:

- "The individual truly has the skills required to perform the duties"
- "Ensuring a good fit with the culture, values and type of work…"
- "That the agency receives a qualified candidate in order to save the organization time and money."

Certainly, a lack of person/job fit could lead to dissatisfaction on the part of the new employee as well as the hiring manager. Because the cost to assess, select, and onboard a new employee is high, we want to try to find that perfect match the first time around to avoid the cost of a bad hire.

Overcoming the Challenge

✓ **Possible Solution: Use Assessments Linked Closely to the Job**

- "...work closely with the hiring managers and SMEs to make sure the assessment tool is as specific as necessary to ensure we capture the most qualified applicants."
- Develop strong assessments linked to the job analysis
- Use assessments that are difficult to fake and/or that measure soft skills (e.g., SJT, *USAHire.gov*)
- Use panel interviews and reference checks

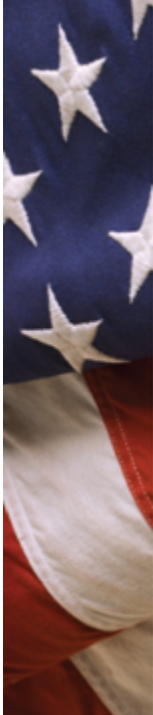UNITED STATES OFFICE OF PERSONNEL MANAGEMENT   7

How can we overcome this challenge? One solution is to use assessments linked closely to the job. One agency said they "work closely with the hiring managers and SMEs to make sure the assessment tool is as specific as necessary to ensure we capture the most qualified applicants." Hiring managers and incumbents are experts as to what competencies a candidate would need to be successful. Another resource you have is the job analysis data. You want to make sure that your assessments are linked to the critical competencies that emerged from the job analysis data.

For those who are concerned about hiring individuals who fit the organization's culture and values, I encourage you to use assessments that measure soft skills such as situational judgment tests (SJTs). SJTs put the applicant in a real-life situation and ask them how they would respond in a particular situation. In these situations, we are not interested in technical skills; rather, we measure competencies such as Teamwork, Decision Making, Interpersonal Skills, etc. Another benefit of SJTs is they are hard to fake – the "right" answer isn't always apparent, which forces the applicant to give their real answers rather than what they just think they're supposed to say.

USA Hire, previously called USAJOBS*Assess*, is an online assessment product and service offered by OPM's Human Resources Solutions. USA Hire assesses math and reading as well as work preferences and interests.   If you would like more information about USA Hire, please contact Dr. Charlie Thompson at Charles.ThompsonJr@opm.gov.

Another suggestion is to use panel interviews and reference checks. Panel interviews allow multiple people to interview and assess the candidate. By conducting reference checks, you are able to converse with someone who has worked with the candidate to get a sense of the competencies that you could not capture through traditional assessments.
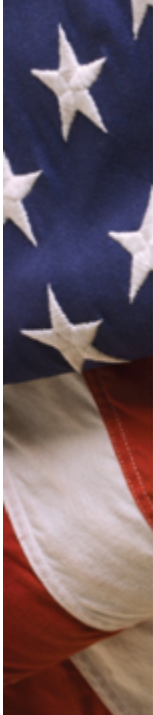
Challenge: Finding the cream of the crop

- Lack of highly qualified candidates
  - "The "best" people for the job are not always interested or available because of the negative stigma and accusations being hurled against [F]ederal employees…"
- ✓ Highly qualified candidates may not view Federal jobs as their first choice of employment

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Some agencies said that highly qualified individuals were simply not applying to the Federal Government. As one agency stated, this could be because, "The 'best' people for the job are not always interested or available because of the negative stigma and accusations being hurled against [F]ederal employees…" by the sources such as the media or because the salaries in the private sector are thought to be higher. As a result, highly qualified candidates may not view the Federal jobs as their first choice of employment.

Overcoming the Challenge
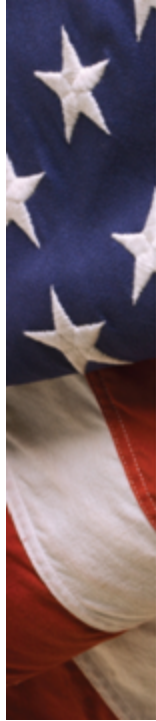
✓ Possible Solutions: Recruitment

- "To overcome the challenge, we've tried to recruit more within the industry"
- Results of the Survey of OPM Supervisors suggest that the top 3 recruitment strategies include:
  1. Networking/word of mouth
  2. Targeting colleges/universities
  3. Targeting professional organizations

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One way to overcome this challenge is by using targeted recruiting methods. For example, one agency said, "To overcome the challenge, we've tried to recruit more within the industry." This is a great tactic! I can tell you from personal experience that I applied for the job that I currently have because I saw the vacancy announcement on a professional organization's website. For those who are having difficulty attracting a highly qualified pool, I recommend looking up the professional organization, perhaps on Google, and posting job announcements on their website.

At OPM we are rolling out a new process to select managers. As part of that effort, we surveyed current supervisors and asked them what their top recruiting methods were. The first one was "networking/word of mouth." In other words, they used inter-organizational recommendations. The second recruiting method was "targeting colleges/universities." Attending college career days and/or job fairs could help attract a larger qualified applicant pool. The third recruitment strategy they used was targeting professional organizations.

Overcoming the Challenge
(continued)

✓ Possible Solutions: Branding
- Market your agency as an Employer of Choice
- Emphasize Government benefits and flexibilities
- Fish and Wildlife embeds videos in USAJOBS posting
  - http://www.fws.gov/humancapital/video/meet_new_boss.html
- USAJOBSRecruit
  - Make it a practice to share recruiting ideas
 - www.usajobsrecruit.gov

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Another way to attract candidates is by branding your agency as one of the best agencies to work for. You want to market your agency as an "Employer of Choice." Another way to brand your agency as a desirable place to work is to highlight the benefits that come with being a Federal employee. Also, if your agency allows for teleworking or has the option for an alternative work schedule, you should emphasize that as well, especially since those might be flexibilities that private sector organizations may not provide.

Fish and Wildlife embeds videos in their vacancy announcements on USAJOBs (http://www.fws.gov/humancapital/video/meet_new_boss.html). The video and text appeals to the values of the applicant and emphasizes that the applicant would be making a difference for both wildlife and for people.

Finally, I want to encourage you to join and participate in USAJOBSRecruit (www.usajobsrecruit.gov). This website is designed to create a Federal community of practice where best practices, job aides, and learning modules can be shared. However, the website is limited to Federal employees.
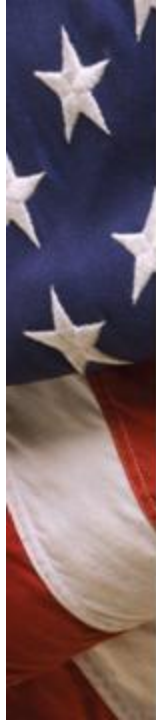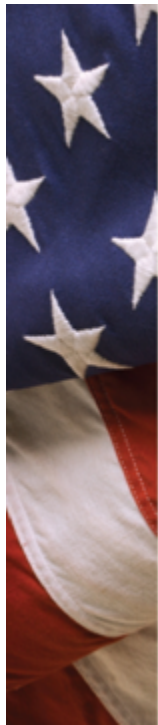
Another challenge is crowd control. As one agency stated: "Because of the economy, applicants have been submitting their applications for vacancy announcements by the hundreds…." In other words, some agencies are reporting that the challenge is dealing with the sheer number of applications.

Overcoming the Challenge

✓ Possible Solutions: Strong Initial Assessment and Realistic Job Preview

- Develop a strong Occupational Questionnaire that will screen out unqualified candidates
- Realistic Job Preview
  - Provides both positives and negatives about job, typically from an incumbent's point of view
  - http://usptocareers.gov/Pages/PEPositions/profiles.aspx
  - http://www.ice.gov/news/galleries/videos/hsi_1811.htm

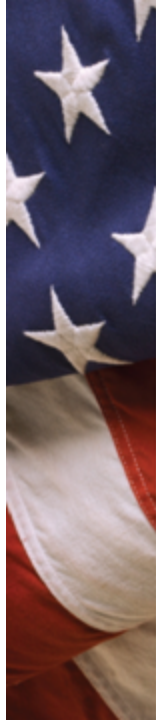UNITED STATES OFFICE OF PERSONNEL MANAGEMENT   12

A possible way to overcome this challenge is to have strong initial assessments and to provide realistic job previews. A well-developed occupational questionnaire will screen out unqualified candidates while a realistic job preview (RJP) can help the applicant screen themselves out.

An RJP presents the positives and negatives of a job, usually from the incumbent's point of view. As an example of how an RJP could work, let's take a position that requires a lot of interaction with the public. Some people may really enjoy that type of job while others may not. An RJP can help the candidate self-select themselves out of a job that would not be a good match for them. We've included two links here to show you examples of RJPs.

The first one is from the Patent and Trademark Office (PTO) (http://usptocareers.gov/Pages/PEPositions/profiles.aspx). They have short testimonials of employees working at PTO in various positions. The applicant can select the link for the position they are interested in to get a sense of the job.

The second link (http://www.ice.gov/news/galleries/videos/hsi_1811.htm) takes you to an RJP for Immigration and Customs Enforcement (ICE). The video shows the type of work that investigators for that agency are involved in. It shows them making arrests, breaking down doors, handling firearms, and so on. Again, an individual who knows that they would not fit well with that kind of environment can self-select themselves out of the job.

Challenge: Full of Hot Air

- Applicant score inflation
  - "Supervisors continue to express concern about applicant self-assessments and overinflated answers. "
  - "Honest applicants tend to be overshadowed by over inflators"

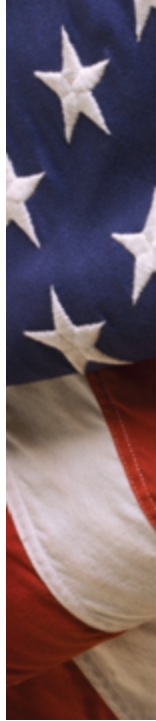✓ Applicants inflate scores on Occupational Questionnaires

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Another challenge is applicant score inflation on occupational questionnaires.   As one agency stated: "Supervisors continue to express concern about applicant self-assessments and overinflated answers." This appears to be a concern for HR specialists as well. One agency looked at the distribution of ratings from one year to the next. The agency realized that applicants were inflating their scores because they realized it improved their chances of being referred. As a result, "honest applicants tended to be overshadowed by over inflators."

This challenge is compounded by the fact that some applicants do not provide detailed resumes. In other words, applicants were simply not providing enough information to support their answers on the occupational questionnaire.

Overcoming the Challenge

✓ Possible Solution: Develop Strong Occupational Questionnaire

- "...Develop actual work related responses to the assessment questions"
- Ask applicants to refer to their qualifying experience on their resume when answering OQ
- Include a verification statement
  - "Yes, I verify that all of my responses to this questionnaire are true and accurate. I accept that if my supporting documentation and/or later steps in the selection process do not support one or more of my responses to the questionnaire, my application may be rated lower and/or I may be removed from further consideration."
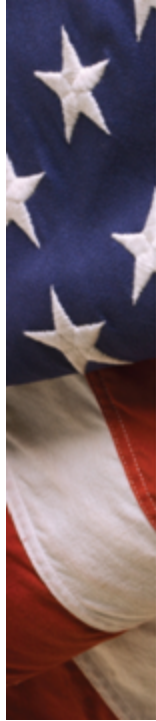
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One way to overcome this challenge is by developing a strong occupational questionnaire. One agency said that they "develop actual work related response to the assessment questions." This is a great idea because it targets the kinds of experiences you're looking for in an applicant. For example, if the competency you are measuring is Written Communication, instead of asking questions with generic responses, you can ask questions that target the types of written correspondence they have worked on. Some of the answer options might read: "I have written policy guidance on HR issues." or, "I have written agency responses or requests to OPM or other third-parties on complex HR topics."

Another way to overcome this challenge is by asking the applicant to refer to their qualifying experience on their resume. While you cannot ask for a lengthy narrative statement, you can ask the applicant to support their response by asking something like: "Identify the specific employment/volunteer work in your resume in which you describe your experience to support your answer to this question."

Finally, adding a verification statement can encourage the applicant to answer honestly. An example verification statement may read: "Yes, I verify that all of my responses to this questionnaire are true and accurate. I accept that if my supporting documentation and/or later steps in the selection process do not support one or more of my responses to the questionnaire, my application may be rated lower and/or I may be removed from further consideration." The notion that they might be removed from further consideration may compel applicants to be honest with their responses.

Overcoming the Challenge
(continued)

✓ Possible Solution: Rely on Experts and Review Resumes
  • "…Encourage the use of subject matter expert panels to rank applicants, particularly for profession[al] or higher graded positions"
  • "Review and override applicant scores/eligibility if resumes don't support 'expert' ratings. "
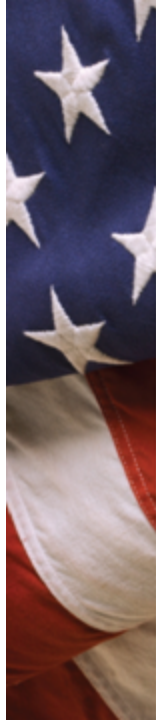
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Another possible solution is relying on experts to review resumes and/or occupational questionnaires. One agency reported that they "…Encourage the use of subject matter expert panels to rank applicants, particularly for profession[al] or higher graded positions." Certainly, incumbents would be able to more easily review technical resumes.

Another agency said that they are overcoming this challenge by reviewing and overriding "applicant scores/eligibility if resumes don't support 'expert' ratings." Just some words of caution: When making changes to applicant ratings, please refer to your agency policies and procedures. It's important to have documented procedures in place so self-ratings are changed consistently across applicants.
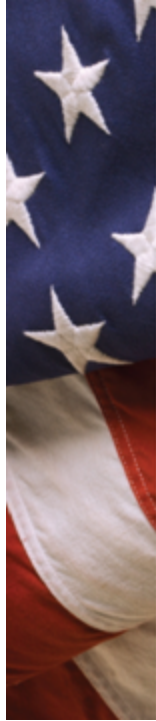
Assessment Factors

2. What factors determine which assessment (e.g., occupational questionnaire, structured interview, etc.) you are going to use?

The second question on our survey was, "What factors determine which assessment (e.g., occupational questionnaire, structured interview, etc.) you are going to use?"
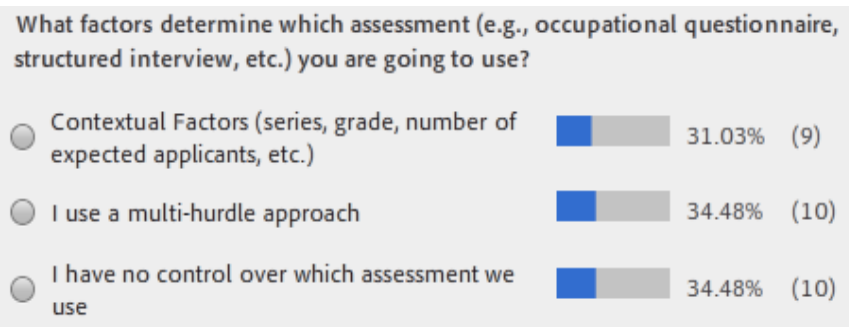
We want to ask you: What factors determine which assessment you are going to use? Is it contextual factors (e.g., series, grade, number of expected applicants, etc.), do you use a multi-hurdle approach, or do you have no control over the assessments you use?

It looks like there is a pretty even balance here with 34% of our audience using either a multi-hurdle approach or not having any control over the assessments that are used. The other 31% said that contextual factors determine which assessment they use.
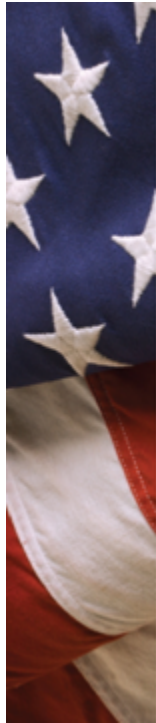
Agencies commented that contextual factors helped drive their assessment decisions:

- "The type of job, the complexity, the perceived availability of quality candidates, the advice of the staffing specialist, organizational policies."

- "The title, series, grade and local practice"

- "Timeliness, competencies required, available alternative assessments and cost direct which assessment methodology"

- "…Available support personnel including subject matter experts and assessment expertise level of the job being filled"

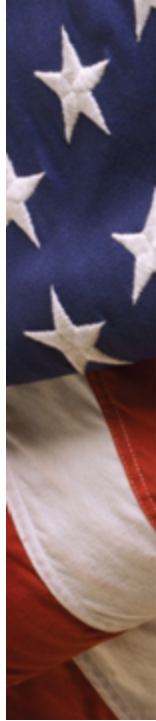In general, the type of job (and its complexity), the available applicant pool, the time to hire, and the availability of support personnel (such as subject matter experts) all contribute to the decision of which (or what) assessment methodology should be used.

Influential Factors (continued)

✓ Multi-hurdle Approach
  • "We tend to use both the questionnaire and interviews."
  • Occupational questionnaire, Structured interview/reference checking
  • "We typically use a progressive hurdle assessment process that starts with the occupational questionnaire or a ranking panel. "
✓ A multi-hurdle approach allows agencies to narrow down the applicant pool efficiently

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Other agencies commented that they use a multi-hurdle approach:

- "We tend to use both the questionnaire and interviews."

- "We typically use a progressive hurdle assessment process that starts with the occupational questionnaire or a ranking panel."

Often, agencies use occupational questionnaires as the first hurdle, the structured interview once the applicant pool has been narrowed down, and then a reference check of the final candidate(s) as the last hurdle. Indeed, a multi-hurdle approach allows agencies to narrow down the applicant pool efficiently.
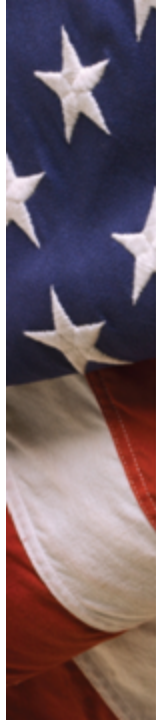
Influential Factors (continued)

✓ **No control**
- "Agency administrative office makes that decision."

✓ **Right Balance**
- "...a balance of obtaining enough information to evaluate candidates while keeping the process sufficiently simple that it does not unnecessarily burden agency representatives or employees."

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Some respondents said they don't have control over the decision of which assessment should be used: "Agency administrative office makes that decision." Another respondent said they look for, "... a balance of obtaining enough information to evaluate candidates while keeping the process sufficiently simple that it does not unnecessarily burden agency representatives or employees."

Recruiting SMEs

3. How do you recruit subject matter experts (SMEs)? Do you have any best practices to share?

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The next survey question we asked was: "How do you recruit subject matter experts (SMEs)? Do you have any best practices to share?"

It's so important to have a good support group of SMEs because they are – or can be – used in every stage of the assessment process. They can provide input and feedback for job analyses, they can check over your occupational questionnaire to ensure it's asking the right questions, or as we mentioned earlier, review technical resumes.

Before we discuss the results of the survey, we'd like to poll our audience: How do you recruit subject matter experts?

- Work with Hiring Official
- Use current SMEs to recruit other SMEs
- Reach out to field offices
- Use available resources/network
- Get buy-in from current SMEs

How do you recruit subject matter experts (SMEs)?

☐	Work with Hiring Official	86.67%	(39)
☐	Use current SMEs to recruit other SMEs	13.33%	(6)
☐	Reach out to field offices	8.89%	(4)
☐	Use available resources/network	15.56%	(7)
☐	Get buy-in from current SMEs	4.44%	(2)
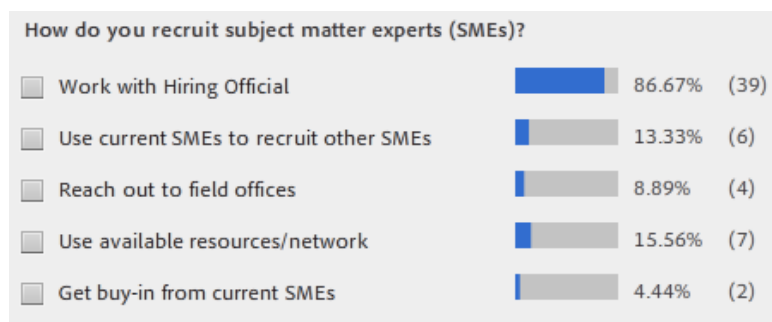
It looks like the vast majority of you (87%) work with your hiring official to recruit SMEs.   Fifteen percent use available resources and/or network, 13% use current SMEs to recruit other SMEs, about 9% reach out to field offices, and only 4% get buy-in from current SMEs.

Recruiting SMEs

✓ **Work with Hiring Official**
  • "Hav[ing] good communication with the hiring manager will assist in determining who the SME will be."

✓ **Use SMEs to recruit other SMEs**
  • "…we had one main SME reach out to their counterparts in the field and ask for volunteers."

✓ **Reach out to field offices**

✓ **Use available resources/network**

✓ **Get buy-in from current SMEs**

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When recruiting SMEs, it appears that working with your hiring official was the method used by a majority of respondents and our audience. As one agency stated: "Having good communication with the hiring manager will assist in determining who the SME will be."

Other option, or method, for gathering SMEs is to use your current SMEs to recruit other SMEs. Another agency offered this tip: "…we had one main SME reach out to their counterparts in the field and ask for volunteers." Also, if prospective SMEs have any questions, they can be addressed by the SMEs who have been acting in that role.

Other methods of recruiting SMEs included reaching out to field offices, using available resources and/or networks, and getting buy-in from current SMEs. Getting buy-in from current SMEs can be accomplished by letting SMEs (or any prospective SMEs) know that the more they help you, the more you help them. By them taking the time to discuss what KSAs a good worker embodies, you're then able to create a better assessment (e.g., occupational questionnaire), which will increase the possibility the selected employee will be a good candidate, and one the SME would like to work with.

The next topic we'd like to talk about is job analysis, or more specifically, conducting job analysis. Our fourth survey question was: "When conducting a job analysis, what tricks/tips can you share that have worked for you or your agency?"

Audience Poll

✓ When conducting a job analysis, what methods do you use?

- Work with Hiring Manager
- Work with incumbents/SMEs
- Have multiple offices review documents
- Use templates
- Use available resources
- Use the position description

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Before we get to what the survey participants said, we'd like to ask our audience: When conducting a job analysis, what methods do you use?

- Work with Hiring Manager
- Work with incumbents/SMEs
- Have multiple offices review documents
- Use templates
- Use available resources
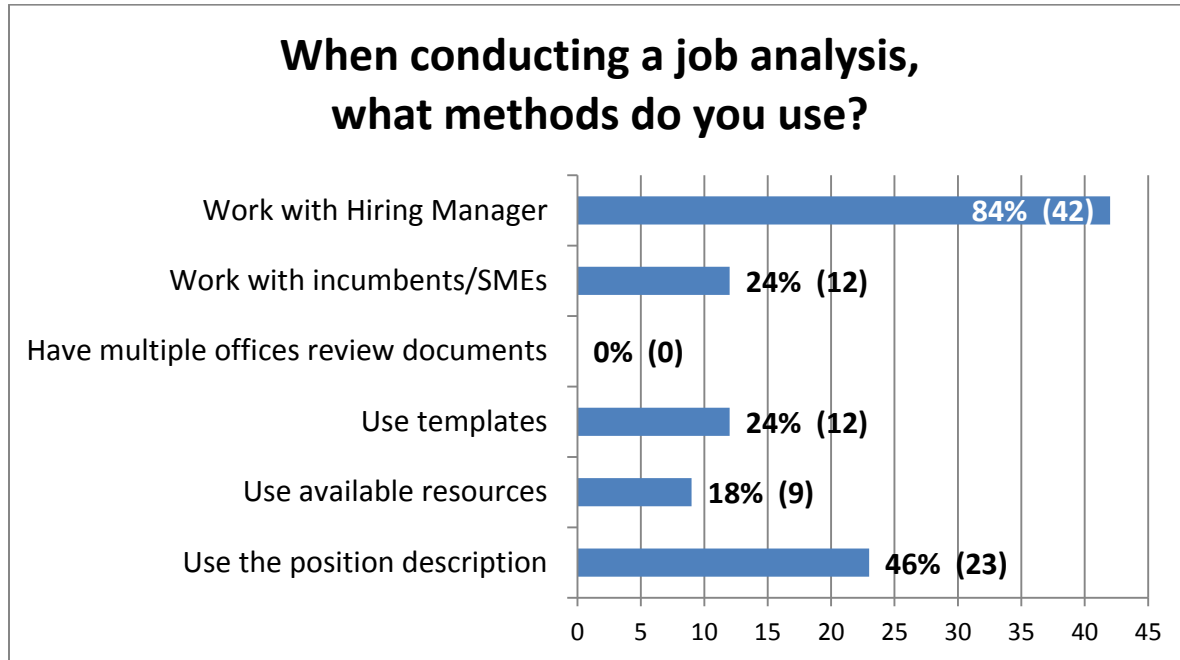- Use the position description

And the results are:

When conducting a job analysis, what methods do you use?

Method	Value
Work with Hiring Manager	84% (42)
Work with incumbents/SMEs	24% (12)
Have multiple offices review documents	0% (0)
Use templates	24% (12)
Use available resources	18% (9)
Use the position description	46% (23)

The majority of the audience (84%) works with their hiring manager when conducting a job analysis. The other methods, in descending order, are: Using the position description (46%), using templates (24%), working with incumbents/SMEs (also 24%), and using available resources (18%). It appears no one in the audience has multiple offices review their documents.

Job Analysis: Working with Others

✓ **Work with Hiring Manger**

- "Having good communication with the hiring manager will assist in determining the knowledge, skills and abilities that will bring in the best qualified candidates"
- "I consistently challenge my supervisors to think of the best employee they ever had and think about what KSAs they possessed coming into the job."

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In conducting a job analysis, many of our agency participants and audience members said that working with their hiring manager was their most often used method. As one agency stated: "Having good communication with the hiring manager will assist in determining the knowledge, skills and abilities that will bring in the best qualified candidates."

Another agency took a somewhat different route: "I consistently challenge my supervisors to think of the best employee they ever had and think about what KSAs they possessed coming into the job." They continued on, saying, "I ask them to concentrate on the traits that make someone likely to succeed in the position--not necessarily what tasks a fully performing employee would be doing."

Asking for hiring managers' input, such as that, is a great way to gather information regarding the job you are analyzing. While it's nice to know what KSAs/competencies are found in employees that have been successful on the job, we caution that when conducting a job analysis, you want to make sure to focus on the KSAs/competencies that are needed or required to perform the job successfully (and not in the "like to have" category). In general, you want to make sure the KSAs/competencies selected are validated (supported) by the job analysis and are required upon entry.

Job Analysis: Working with Others
(continued)

✓ Work with SMEs
- "Make detailed observations and notes of the daily activities of employees...Taking the time to conduct an informal interview also goes a long way. "

✓ Work with field offices
- "An assessment is crafted in one HR office then routed via email to all other HR offices."
- "... we've been using an excel workbook with different tabs. We send it back and forth between HR and the SMEs to collect SME data regarding the position. "

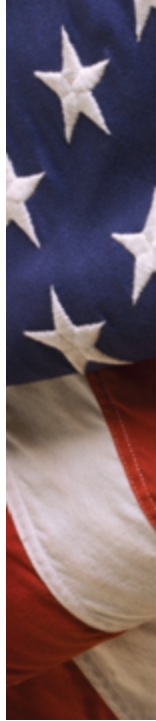UNITED STATES OFFICE OF PERSONNEL MANAGEMENT   27

To continue our discussion regarding methods used to conduct a job analysis, two other methods that were popular with our agency respondents was to work with incumbent SMEs and to work with field offices.

In working with SMEs, one agency offered the following tip: "Make detailed observations and notes of the daily activities of employees…Taking the time to conduct an informal interview also goes a long way."

In regards to working with field offices, one agency said: "An assessment is crafted in one HR office then routed via email to all other HR offices." Another agency shared how they work with outside offices in conducting a job analysis:

> "For job analysis we've been using an [E]xcel workbook with different tabs. We send it back and forth between HR and the SMEs to collect SME data regarding the position. It really helps to collect the data in one place (tasks, competencies, linkages) evaluate the data in different ways and to correspond virtually as most of our SMEs are located in different states. We don't have the opportunity to meet face to face because of budget cuts. The workbook also helps keep the dialogue with SMEs and selecting officials job-related and focused on the position and what the position requires rather than jumping immediately to the people. Keeping the job analysis this way also presents a streamlined way of developing the questionnaire and specialized experience. The workbook can be a starting place for similar positions that can be modified for the specifics of a particular position so you don't need to reinvent the wheel every time. Formulas in the workbook eliminate time spent on calculations and averages. It's easy to highlight what competencies must be recruited for versus which can be learned on the job. Additionally, management can use the workbook as a tool when they are putting together performance standards for the position."

We think this is a great idea. Excel is an excellent tool (as are other spreadsheet programs) to collect, gather, rate, and select the data required when conducting a job analysis.

Job Analysis: Draw from Existing Resources

✓ **Templates**

- "Working with the supervisor, we filled out the [template], including a rating matrix that identified specific skills and abilities, which in turn bec[omes] the basis for our selection criteria and our interview questions."
- Delegated Examining Operations Handbook, Appendix G (http://www.opm.gov/policy-data-oversight/hiring-authorities/competitive-hiring/deo_handbook.pdf)

✓ **Position Description (PD)**

- "Breaking down the PD helps both the Staffer and the SME/Selecting Official"

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Another method for conducting a job analysis is to draw from existing resources. To paraphrase what an agency respondent said from the last slide, why reinvent the wheel when it's already been created? There are many resources out there that have done a lot of the hard work for you – seek them out and use them as much as you can!

One agency used a template as a starting point: "I worked from a template that guided the develop[ment] of the job analysis. Working with the supervisor, we filled out the [template], including a rating matrix that identified specific skills and abilities, which in turn became the basis for our selection criteria and our interview questions."

Another excellent resource for information regarding job analysis is Appendix G of the Delegated Examining Operations Handbook, http://www.opm.gov/policy-data-oversight/hiring-authorities/competitive-hiring/deo_handbook.pdf

Lastly, using the position description (PD) of the job being analyzed can be helpful: "Breaking down the PD helps both the Staffer and the SME/Selecting Official."

Job Analysis: Draw from Existing Resources (Continued)

✓ O*Net/NIH
  • "Starting with available content including competency model and O*net resources"
  • http://www.onetonline.org/
  • http://hr.od.nih.gov/workingatnih/competencies/occupation-specific/default.htm

✓ Library of data
  • "[We have] created a library of job analysis/occupational questionnaires that is available to supervisors or SMEs on a Sharepoint site."

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More tricks and tips for collecting job analysis data include using existing resources, such as online competency libraries and other such sites. One agency said they start "with available content including competency model and O*N[ET] resources."

There are many resources on the web, but two we've highlighted here are O*NET (http://www.onetonline.org/) and the National Institutes of Health Office of Human Resources listing of suggested competency models by job series (http://hr.od.nih.gov/workingatnih/competencies/occupation-specific/default.htm).

Finally, creating a library of available – and sharable – data can save everyone a lot of time in conducting a job analysis, especially if the jobs cover similar elements or competencies. As another agency said: "[We have] created a library of job analysis/occupational questionnaires that is available to supervisors or SMEs on a Sharepoint site."

Occupational Questionnaires (OQ)

5. When writing an occupational questionnaire, what tricks/tips can you share that has worked for you or your agency?

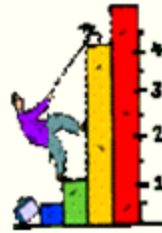UNITED STATES OFFICE OF PERSONNEL MANAGEMENT

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Next, we'll discuss occupational questionnaires (OQ) and the tricks/tips that were shared by the agency respondents. The question we asked them was: "When writing an occupational questionnaire, what tricks/tips can you share that have worked for you or your agency?"

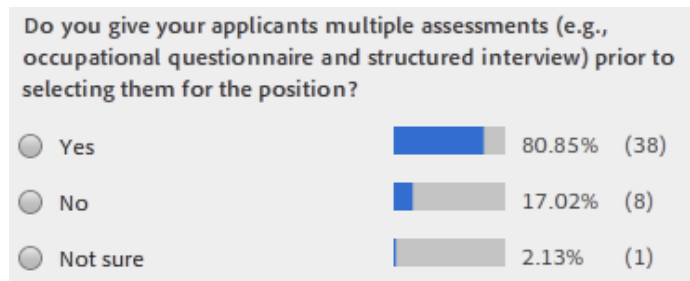Before we get to their responses, we'd like to ask the audience about their assessment process. The question is: Do you give your applicants multiple assessments (e.g., occupational questionnaire and structured interview) prior to selecting them for a position? Yes, no, or not sure?
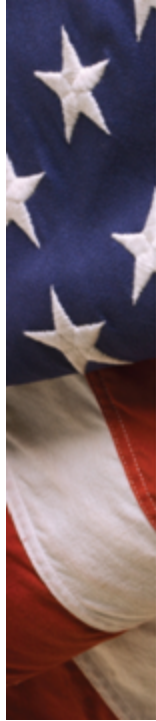

The majority of you (81%) do use multiple assessments when selecting applicants, 17% do not, and one audience member (2%) is not sure.

OQ: Draw from Existing Resources

✓ **Use Existing Templates**
- OPM guide: http://www.opm.gov/policy-data-oversight/human-capital-management/hiring-reform/reference/itemwritingfactsheet.pdf

✓ **Position Description**
- "Have an understanding of what you are seeking and knowledge of the position description document"

✓ **Use existing Items**
- "Steal and plagiarize! We have several managers who developed quality assessment questions and results have been successful"
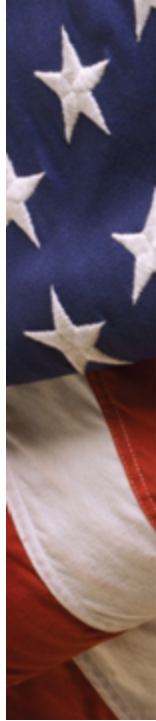
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Much the same as the tricks/tips used for conducting a job analysis, our agency respondents had suggestions for methods such as using existing templates, the PD, and other existing items.

Other suggestions included using:

- Existing templates (such as OPM guidance, http://www.opm.gov/policy-data-oversight/human-capital-management/hiring-reform/reference/itemwritingfactsheet.pdf)

- PDs ("Have an understanding of what you are seeking and knowledge of the position description document")

- Existing items as possible resources to draw from ("Steal and plagiarize! We have several managers who developed quality assessment questions and results have been successful")

Other tips agencies provided regarding occupational questionnaires included:

- Working with their supervisor and/or SMEs ("Have the manager do a thorough review of the questionnaire and provide input")

- Collaboration ("We offered training and mini-workshops for small groups of HR staff. The mini-workshops allowed HR staff to work through their unique assessment with the help of other HR staff. We then route[d] through the agency's HR offices and have a final Quality Assurance review before the assessment is loaded in the system.")

It's also helpful to keep a few tips in mind when using or writing occupational questionnaire items. You'll want to select items that will help distinguish between the candidates. If an item is too general ("Is proficient in Excel"), everyone will mark themselves as "Experts," which is not helpful when it comes time to determine who actually *is* proficient with using Excel (or spreadsheet programs in general). It's better to ask yourself, "What do I mean by 'proficient'? What do I need the candidate to be able to do?" and use that (e.g., "Knows how to produce descriptive statistics (e.g., average of data) using popular spreadsheet programs") as the occupational questionnaire item.

Other tips include making sure the item is simple and clear. This ensures all candidates can understand what the item is asking. Finally, when you're creating an occupational questionnaire item, make sure it relates back to the job (is work-related).

Structured Interviews (SI)

6. When developing and/or conducting a structured interview, what tricks/tips can you share that have worked for you or your agency?

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Finally, the last topic we asked survey respondents about was structured interviews (SI). Our question was: "When developing and/or conducting a structured interview, what tricks/tips can you share that have worked for you or your agency?"

Audience Poll

✓ Does your agency conduct structured interviews?
  • Yes
  • No
  • Not sure

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Before we get to their responses, we'd like to ask our audience: Does your agency conduct structured interviews? Yes, no, or not sure?

Does your agency conduct structured interviews?

◯ Yes	75%	(33)
◯ No	15.91%	(7)
◯ Not sure	9.09%	(4)
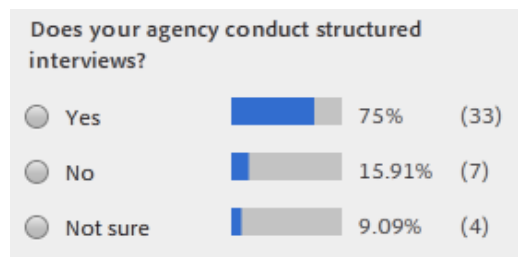
It looks like the majority of you (or your agencies) conduct structured interviews (75%), while some do not (16%), and others are not sure (9%).
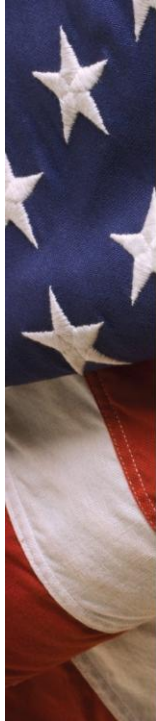
SI: Tips

✓ **Conduct Interviews with Panels**

- Results of the Survey of OPM Supervisors support the use of panels interviews

✓ **Training for Panel Members**

- "Meet with the panel that will be interviewing prior to interviews to explain the process, go over questions, look for what responses will be best responses to what we are trying to find in the applicant that is selected."
- OPM Structured Interview Guide (http://www.opm.gov/policy-data-oversight/assessment-and-selection/structured-interviews/guide.pdf)

One of the tips comes from a survey that was conducted with OPM supervisors. They were asked, "Describe successful rating or interviewing techniques that you believe help to identify the best selectee." The top response was, "Structured interviews." Many of the supervisors were using panel interviews and asking candidates both behavioral and situational questions.

One of our survey respondents said their agency found it helpful to provide training for their structured interview panel members: "Meet with the panel that will be interviewing prior to interviews to explain the process, go over questions, look for what responses will be best responses to what we are trying to find in the applicant that is selected."

One tip we'd like to point out is to use the panel members to "pilot test" the items. That is, to ask the panel members what they think of the questions, if the questions make sense, and so forth. It can also be very useful (or a good second check) to ask the panel members to identify what competency they think a given question is "covering." If the panel members think the question is referring to a different competency than what it was intended for, that might be an indicator that the question needs to be re-visited.

Another great resource for anyone who would like to learn more about creating and conducting structured interviews is OPM's Structured Interview Guide, http://www.opm.gov/policy-data-oversight/assessment-and-selection/structured-interviews/guide.pdf

SI: Tips (continued)

✓ **Use Behavioral/Situational Questions**
  - "Structure [situational] questions around real life scenarios that have occurred or have the potential to occur in the position and see how the applicant responds."

✓ **Standardized Procedures**
  - "Being consistent in asking the same questions of all applicants. I like to include asking about their paid and unpaid job experience…"

✓ **Focus on Key Competencies**
  - "Identifying those key competencies that separate out truly best qualified candidates."

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As a quick reminder, structured interview questions can be one of two types: Behavioral or situational. Behavioral interview questions ask applicants to describe a past behavior demonstrated in a situation relevant to the competency of interest. Situational interview questions ask applicants to describe what they would do or how they would behave in a situation similar to those encountered on the job.

One agency respondent said they "Structure [situational] questions around real life scenarios that have occurred or have the potential to occur in the position and see how the applicant responds."

Another agency advocated ensuring the process is standardized: "Being consistent in asking the same questions of all applicants. I like to include asking about their paid and unpaid job experience…". Finally, another agency said that focusing on key competencies was paramount in "identifying those key competencies that separate out truly best qualified candidates."

Summary

✓ Use job related assessment tools to hire the most qualified applicants and save hiring costs in the future

✓ Network and recruit in the industry (colleges, professional organizations) to target a wider pool of qualified candidates

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To summarize all the great advice, thoughts, and tricks supplied by the agency respondents:

- Use job-related assessment tools to hire the most qualified applicants and save hiring costs in the future. This is the best way to ensure you're assessing candidates on critical KSAs/competencies that are needed to perform the job successfully.

- Network and recruit in the industry (e.g., colleges, professional organizations) to target a wider pool of qualified candidates. Of course, posting your position on your website and/or USAJOBS.gov is always a good idea, but really reaching out to other areas can bring a big payoff in terms of the quality of candidates. For example, if you're trying to fill an engineering position, you might want to consider recruiting at nearby (or even further, if budget allows) schools with engineering programs.

Summary (continued)

✓ Develop OQs with work related responses to screen out unqualified candidates
  • Use existing OQ templates/questions that have been successful in the past
✓ Maintain good communication with Hiring Managers, SMEs, and field offices when conducting a job analysis or developing an assessment
✓ Use a structured interview
  • Train your panel and pilot the process

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- Develop OQs with work-related responses to screen out unqualified candidates. Also, there's no need to reinvent the wheel when it comes to OQ items; if something else currently exists that can be used – use it! Using existing OQ templates and/or questions that have been successful in the past is a great idea and a great time-saver.

- Maintain good communication with hiring managers, SMEs, and field offices when conducting a job analysis or developing an assessment. Not only does this keep everyone in the loop, but it also encourages "buy in" and ensures that everyone is in agreement with what KSAs/competencies the job requires, what type of assessments are being used, and so on.

- OPM supervisors agree that structured interviews help to identify the best candidates and it appears that many of our audience members and agency respondents use them as well. Structured interviews are preferable (to unstructured interviews) because all candidates are asked the same questions and are rated using the same scoring methodology. An agency respondent advised on training those serving on the structured interview panel, and we highly recommend you use the panel to pilot test the structured interview questions.
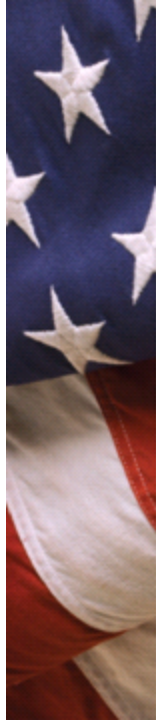
One-on-one agency assistance available!

Assessment_Information@opm.gov

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That wraps up the webinar for today. Thank you, again, for all the agency respondents who took the time to respond to our survey and let us in on their secrets and tips.

As a reminder, one-on-one agency assistance is available to provide technical guidance to agency HR professionals and hiring officials on assessment strategy and development.

As always, if you have any other assessment-related questions, please contact us at Assessment_Information@opm.gov.