Visit us on the web at:

www.psychometricsforum.org

You will find information about forthcoming events, speakers, the origins of the group and much more.

Want to add something to the web site?

Contact our Administrator Caro Leitzell: admin@leitzell.com

Also keep up to date with developments by signing up to The Psychometrics Forum Affiliates Group on LinkedIn
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Adrian Starkey - Chartered Occupational Psychologist
adrian@xlr8talent.com

Dear Reader

Firstly I would like to take a moment to thank all of the contributors to this edition of Psyche. In particular it is a pleasure to receive such varied pieces from both the practitioner and test publishing sides of the house – clearly not mutually exclusive groups. I hope that this is a trend that will continue in future editions.

I was very pleased to have had the opportunity to meet a number of you at our September event where we heard from Dr. Adrian Atkinson of Human Factors on ‘Authentic Leadership’ and Beverly Alimo-Metcalfe & Dr. John Alban-Metcalfe on their work related to Transactional and Transformational Leadership and associated 360 tools. Looking ahead we have the ‘New Frontiers in Psychometrics’ event to look forward to on the 25th of November. This is an annual session hosted by our Vice-chair Dr Hugh McCredie and promises to provide a varied selection of new developments within the field.

Our LinkedIn TPF affiliate group continues to grow in strength as a forum for debate and the sharing of information. We now have over 800 Linked-In affiliates and are starting become the definitive independent forum within the psychometrics community. Recent discussion threads on new developments in psychometrics and the perennial normative vs ipsative
debate have been particularly lively. Many thanks to those of you who contributed. Please spread the word and encourage your colleagues and associates to also sign-up on-line via LinkedIn.

Finally, I am delighted to be able to announce that moving forward past editions of Psyche will be available as PDF downloads via our website. Our hope is that this facility will provide a source of reference and further promote the work and interests of The Psychometrics Forum.

Please note the copy deadlines below and feel free to drop me a line with any feedback or thoughts for future features or contributions.

**Psyche Copy Deadlines:**


**Forthcoming Forum Meeting Announcement**

**Thursday 25ᵗʰ November 2010: 'New Frontiers in Psychometrics'**

This annual event aims to look at new concept psychometrics, new applications for established instruments, new insights into aspects of the Big Five model or the structure of mental abilities, new alternative models of personality, ability and competence and comparative validation studies.

With proactive chairing by Dr Hugh McCredie, Vice-chair The Psychometrics Forum, presenters for this year’s event will be:

- Rob Feltham, Melanie Brutsche & Kate Young (Cubiks)
- Chris Dewberry (Birkbeck, University of London)
- Steve Woods (Aston Business School).
- Rob Bailey (OPP)

**Cost:**
Full TPF Members: £60
LinkedIn affiliates & Non-members: £85 (including coffee, buffet lunch & afternoon tea)

**Booking via:**
TPF MEMBERSHIP ADMINISTRATOR
Caro Leitzell
Tel 01962 880920
admin@leitzell.com

We are limited to 40 attendees at the Naval Club, so early booking is recommended to avoid disappointment. Secure your place via Caro Leitzell, by Friday 12th November 2010.
How we Morphed from the 16PF User Group to The Psychometrics Forum - and where to Next!

Nicholas Bennett & Harpal Dhatt - Business Psychologists & TPF Committee Members

This summary article looks at the original 16PF Users Group that we were and, the reasons we changed into The Psychometrics Forum. It also describes some of the difficult issues we faced then and how we followed good occupational psychological advice to identify our future strategy. We hope that others will find some helpful lessons here – just as we did.

So back to the 16PF User Group. This started in 1988 by Roy Childs as a very practical and useful meeting place for those who used RB Cattell’s 16PF psychometric. The objectives included passing on helpful information about scoring and interpretation, plus providing a meeting point for the test publishers and users. Members included professional occupational psychologists, those involved in coaching, as well as those in other professions such as Human Resources (HR aka Personnel,) Teaching, and other interested parties.

The 16PF User Group was renamed early in 2008 as The Psychometrics Forum, as a response to changes in the increasingly diverse range of psychometric assessments and the interests of our members. Our aim was and is to explore the application of these instruments in a variety of situations such as selection, personal development, and coaching. A voluntary Committee organises the themes and speakers for each event and it was this Committee that decided to put forward the new identity and objectives, which were ratified at the subsequent AGM.

Also during 2008, it was becoming very clear that organising The Psychometrics Forum was becoming a major task. That required more committee members since attendance was increasing and we were concerned about the capacity of our venue. Finally, we wanted to continue to provide top class speakers, seeking international speakers where possible.

In 2009, through personal contacts, we were approached to invite as guest speakers both Dr Robert Hogan – President of Hogan Assessment Systems and Robert Kaiser – Partner of Kaplan DeVries Inc. This would be a major one-day event and posed a number of logistical problems. Not the least of these were the issues surrounding any late cancellation, subsequent risk insurance, a bigger venue, catering and volunteers to help run this major event.

The big day came on Wednesday 13th January 2010 and we tried to change the preferred speakers’ date but to no avail. You may recall that there was heavy snow and ice during the preceding night causing major transport chaos. This did nothing to help our nerves! Actually, the day was a great success with both speakers arriving early to our bigger venue. Most delegates (80% plus) arrived - cold – but in spite of the travel problems.

We learnt a lot that day and it caused us as a committee to step back and think through our true aims and ambitions for this Group. Issues included:

- The comfortable size of meeting attendance
- The need for a detailed look at our finances to see if we could cope with increased potential expenses including possible risk insurance
- Our division of responsibilities as a voluntary committee and some serious thought on time commitments, strengths, leadership and what our team really wanted to gain out of being committee members
- Our website development and upkeep
- Meeting costs, and meeting attendance fees for members and guests
Overall, we had to decide on whether to grow TPF or to keep this group as it was. To help this process, we decided upon a structured approach that included using two psychometrics - through the good services of their publishers.

The first was the Strengths Partnership © **Strengthscope** Team Profile and, the second was the Centre of Applied Positive Psychology (CAPP) © **Realise2**, again used as a Team Profile.

From the results, it became clear that we were Creative, wanted Growth, were particularly good at Esteem Building and giving Feedback – quite good for a group which were mostly involved in various forms of Coaching activities. Also clear was that we were individuals, with varying and many responsibilities both with work and personal commitments. As you can imagine, much discussion ensued over our future as TPF and the use of the characteristics of the voluntary team that make up the committee.

So what have we decided and where do we go now? The answers to these questions are still unfolding, but so far we want to run one big event per year attracting international speakers, along with our regular meetings at The Naval Club, Mayfair. We have also divided responsibilities using our perceived strengths and we look to the future with both optimism and realism.

Find more information on [www.psychometricsforum.org](http://www.psychometricsforum.org)
Also on LinkedIn The Psychometrics Forum.

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**Resilience and Career Coaching:**  
**Rob Nathan & Gilly Freedman**  
*Review of The Psychometrics Forum Event – 22nd June 2010*

**Lynne Hindmarch - Business Psychologist & TPF Committee Member**

Rob Nathan and Gilly Freedman from Career Counselling Services, London, kicked off the Forum with a lively and highly participative morning session. Rob emphasised from the outset that he believed that people can develop resilience – that it can be taught – whilst Gilly discussed the research and writing on the subject. There has been increased interest in the area, particularly in the light of the recession. It has emerged as a key factor in career change and the accompanying uncertainty and ambiguity. At this point we worked in pairs to discuss what resilience meant to us. When we shared ideas with the larger group it became apparent there was quite a lot of agreement in terms of the phrases identified to describe it, such as bouncing back after a set-back (‘with dents’, someone added); flexibility; viewing problems as challenges; having a vision and goals; and developing some stable routines.

Rob and Gilly gave examples of different definitions from writers on the topic, and identified some common themes: that resilience is a learned ability and attitude that helps people cope and even thrive in situations of adversity and uncertainty for sustained periods. In a longitudinal study using data from attitude surveys, Maddi and Khoshaba (2005) identified 3 attitudes and skills which were associated with a positive outlook: commitment (engaging with, and finding meaning in, a situation); challenge (learning and growing from it); control (finding some areas where the individual has control and could make a difference).

Rob and Gilly explored further the ‘developable’ aspects of resilience, drawing on the work of Reivich (2005) who identified 7 skills that could be learned:
- Emotional awareness and control
- Impulse control
- Optimism
- Causal analysis
- Empathy
- Self-efficacy
- Appropriate risk-taking

A further exercise in pairs had us drawing on our experience to consider how we might help someone become more resilient. In the plenary discussion a number of ideas were put forward, including: challenging negative beliefs; building confidence; developing skills, self-talk; taking action (even small steps); identifying what we can and cannot influence; preparation (and visualisation) before an important event; bringing in other people to help; taking stock, stepping back from the issue and looking at possibilities; the serenity prayer; and re-connecting with how things were in better times. An important point was supporting the negativity that the person is experiencing – accepting that it is normal to feel bad sometimes – before working on it.

Rob and Gilly described the work of Albert Bandura on social learning theory to emphasise the learning and development aspects of resilience, particularly learning by observing others. Bandura (1977) described self-efficacy as the belief in your ability to succeed in a particular situation or doing a particular thing. He described four learning sources:

- Mastery experiences (achieving goals through perseverance and overcoming obstacles).
- Social persuasion (persuading the client that s/he possesses the capabilities and setting manageable challenges to confirm the belief).
- Social modelling (identifying models who display the desired competencies who can pass on their knowledge to the client).
- Psychological response experiences (connecting with positive emotions).

Focusing on connecting with positive emotions, Rob worked with Helen, a volunteer from the audience, to give an effective demonstration of how to involve a client actively in accessing a positive experience, analysing it and identifying the strength and skill that was used. The positive experience was relived as intensely as possible, by focusing on specific aspects of it, visualising it, recalling and reliving it, with the client actively involved in the process. Rob emphasised that access to past positive experiences is an important aspect of developing resilience, optimism and strength. This means getting in touch with sensory detail, creating meaning in relation to the experience and giving in the moment feedback. Rob closed a practical, useful and enjoyable session by returning to the theme of career coaching, and suggesting that working with clients to identify positive experiences and the associated strengths has a number of applications in areas such as CV and interview preparation, as well as contributing to the exploration of alternative career options.

**Further reading and sources of information:**


Psychometrics in Coaching – Supporting People Towards Successful Career Decisions: Jonathan Passmore
Review of The Psychometrics Forum Event – 22nd June 2010

Ann Rodrigues – TPF Committee Member

Occupying the “graveyard slot” after lunch - and particularly on an unexpectedly hot day - nothing daunted, Jonathan Passmore who prompted a fair amount of debate and challenge from his audience.

Jonathan is the Director of the Coaching Psychology Unit at the University of East London, and author of many books and articles on coaching and organisational change and policies. Today, his talk covered:

- Psychological tools available for coaches
- Evaluating which questionnaire to use
- Case studies
- Giving feedback in coaching conversations

Describing himself as more of a coach than a psychometrician, he started by putting the psychometric tools available for career coaching in two categories, general personality instruments (e.g. MBTI and its variations, NEO, Wave, OPQ32, 16PF, HDS) and specialist ones such as Emotional Intelligence (EQi / MSCEIT), Resilience (MTQ48), Stress (Stress-scan), Strengths (VIA) and Coaching (UCF). Or more evocatively as fruit salad versus strawberries & cream respectively!

Jonathan pointed out that in US literature, psychometrics is the first step in the coaching process. However the danger is that the coach can prejudge the individual and therefore fit him/her into the category the coach has already decided on – and, as we know, we find what we look for.

He then invited the audience to discuss what psychological tools we use and why. As expected, the answers were wide-ranging, including one member, Andrew West, who designs his own 360-degree instrument.

Despite some arm-twisting, Jonathan would not be drawn on what his own preferences are, but to select the most appropriate tool, he suggests we ask ourselves four questions:

- What are my coachee’s needs?
- What tools are available to meet this need?
- Which tools am I licensed to use?
- What is the reliability & validity of these instruments?

In answer to the third point he recommended that we should be familiar with and licensed to use 7 or 8 instruments, a mix of trait, type and specialist. This caused some consternation in the audience, most of whom are independents, given the costs involved. Nevertheless, Jonathan stuck to his guns, because using a wider repertoire of instruments increases the richness of what we can bring to our coaching conversations, and he argued that there are low cost suppliers of psychometrically designed questionnaires.

In a second exercise, he asked us to consider how using psychological tools in coaching differs from how we use them more generally. The short answer seems to be that the results should be discussed more tentatively in coaching.
In a third exercise – yes, our speaker was definitely keen to keep us on our toes – we were given two case studies. These were Jennifer who was struggling in her new role in a NHS Trust; and Jason, the embattled head of operations in an oil company which was facing a huge environmental disaster. Sound familiar? Purely coincidental!

Again this generated much debate, but of course there could be no consensus. One idea I liked was the use of HDS for Jason, which explores decision-making and sociability during stress. For Jennifer, Jonathan felt it was important to take into account third party views of the individual [obviously more difficult to get 360 or even 180 feedback in career coaching].

The final part of Jonathan’s talk was on the role of feedback, based on the belief that people’s behaviour will change for the better. However research (Kluger & DeNisi, 1996) show that feedback can actually result in performance decline in 30% of cases. Therefore feedback should be backed up with coaching to support and challenge to the individual. He contended that 40% of performance improvement happens outside the coaching conversation [where is the rigorous research to prove this?]

He finished his talk with some general basic pointers about how to improve performance through coaching, including the importance of ‘allies’ for the coachee, someone who will support, encourage and champion the individual to achieve change.

Summary

As an experienced coach, I felt that Jonathan’s comments were familiar and directed at coaching in general rather than career coaching specifically. However, Jonathan is an engaging speaker who held our attention and we are grateful that he took time to address the Forum.

Adaptive Testing: Multiple Benefits

Steve O’Dell – MD of Talent Q

Introduction

The use of Computer Adaptive Testing (CAT) in psychometric assessment has become significantly more popular in the UK during the past few years. Roger Holdsworth and his research team at Talent Q developed the Elements suite of ability tests using an adaptive model in 2005; this article presents their reflections on the use of CAT for psychometric testing.

The history and theory behind CAT has been well documented and this article does not replicate that. Rather, we provide an overview of our experiences to date.

Elements

The Elements ability tests sit within Talent Q Assessment Systems (TQAS), which also include a personality assessment (Dimensions) and a 360-degree competency assessment (MultiView). Elements consists of Numerical, Verbal and Logical Reasoning tests. Put simply, rather than a pre-determined linear journey through test questions of gradually increasing difficulty, the adaptive model presents the candidate with questions of increasing difficulty or simplicity based on their test performance in real-time.
Countering Resistance

Of course, not all organisations immediately accept the adaptive testing premise. After all, for three decades, we have as a profession stated that standardisation of assessment should be achieved at all costs. At Talent Q, we have taken a number of approaches to build confidence in CAT. Concerns are often addressed by inviting clients to personally complete the tests as part of an evaluation.

As a test publisher, our role has been to help clients understand that every question contributes to an accurate candidate score. Instead of asking candidates questions that are far too easy or too difficult that give us no extra information about the candidate, Elements hones in on a candidate’s ability level, using their responses to previous questions to ensure that they are presented with questions that are appropriately challenging. Having conducted validity research with clients we can illustrate the strong predictive power of these tests.

Concerns regarding the potential for cheating when testing in a remote environment are common to all online tests. As might be expected, we have included a “verification” testing option, whereby a supervised assessment can be conducted subsequent to a remote assessment. Clients are assured to know that they can re-test candidates using a short (8 minute) test which ‘remembers’ the candidate’s ability level, presents questions pitched around that level and compares their performance in both conditions to provide a confidence rating that it was the same person who completed the two tests.

The Appeal of Adaptive Testing

CAT offers all of the same advantages as typical online psychometric tests including:

- Completion of tests at a time convenient to the respondent
- Reduced administrative load for client
- Remote testing provides access to a wider geographic applicant pool
- Reduced testing costs and instant results provision

However, the benefits to be gained from CAT go further and are clear for both clients and candidates.

Firstly, test duration. Because adaptive tests take larger incremental increases (or decreases) in difficulty than traditional linear tests, they are shorter. Elements tests each last between 12 and 15 minutes. This makes for a more positive candidate experience, owing to less time spent in a pressurised testing environment. Using Dimensions (typically 30 minutes to complete) and two Elements tests, clients can gather a significant amount of data on a candidate in just 60 minutes. Their shorter duration also supports their use in sifting candidates in the early stages of recruitment.

Secondly, the potential for any practice effect is vastly reduced. Should a candidate complete an Elements test on more than one occasion, they will be presented with different questions, even if their performance during the test is identical. This is because every question sits at a defined level of difficulty and Elements randomly selects from questions at the same difficulty level. For clients, this can assuage any worry about test content being made public among candidates, or of repeat applicants benefitting from test familiarity. Candidates may regard this as less of a benefit but for the majority it helps to assure them that the process is fair!
CAT increases **test applicability across all organisational levels**, removing the need to maintain a large number of separate tests for use with employees at different levels. Due to the large range in difficulty of questions, the same test can be used for the most junior and most senior employee, comparing their scores on the same (or different) continuum.

From a talent management perspective, adaptive tests allow for the **comparison across the whole organisation** and enables clients to measure **true potential** as there is no ‘cap’ resulting from using a test that may actually be too easy for the test taker. Post-hoc comparison against more challenging norm groups further facilitates the identification of potential, without the need to administer separate (e.g. “managerial”) tests.

Despite their relatively short length, Elements tests afford extremely **high standards of validity and reliability**. Cronbach’s Alphas for internal consistency reliability are in the region of 0.8 for all three tests with test-retest reliabilities in the region of 0.7. An examination of data analysed for the latest psychometric review has **not highlighted any significant age, gender or ethnic differences** beyond those uncovered in general research of this kind. This illustrates that the adaptive approach does not in itself disadvantage any particular candidate group. Being available in over 20 languages further increasing their applicability and fairness.

CAT requires a **significant initial investment** in terms of development time for the publisher due to the complexity of designing questions at multiple parallel levels of difficulty. Added to this is the increased sample required for trialling and attaining test-retest reliability coefficients when there are in effect multiple versions of the same test. However, this approach pays dividends in terms of brief, yet accurate measurements representing an excellent alternative to traditional linear tests.

**Conclusion**

CAT represents an evolution in ability testing, their ease of use and flexibility for clients makes their advantages obvious. As a profession, we need to continue to reassure and educate our clients as they move from the more traditional tests to this new approach. We must also continue to question and challenge new approaches so that we ensure candidates are treated fairly and ethically.

**Can Psychometrics Play a Role in Redundancy Decisions?**

*Rob Bailey, Jenny Kidby, Katie Lyne – All of OPP Ltd.*

As recession started to bite in late 2008, and many of our clients found themselves cutting staff numbers, OPP realised we would need a clear position on whether or not our psychometric instruments could be used in redundancy situations. To ready ourselves for client queries about best practices in redundancies, we researched published guidelines but found little specifically on redundancies.

We became aware that we would have to write our own guidance, so our Research and Development, Consultancy and Training teams all worked together to agree OPP’s position on redundancy advice. In 2009, we presented this guidance to a good reception at the US Society of Industrial and Organizational Psychology’s Conference (SIOP), and found that the guidelines were applicable to the US as well as the UK.

Unfortunately, two years later, redundancy is still a current issue, particularly for the UK’s public sector; hence our sharing of these guidelines with The Psychometrics Forum at this time.
We were acutely aware that redundancy is a life-changing and worrying experience for employees; hence something to be approached with great care and sensitivity. A badly handled redundancy decision risks leading to bitter feelings, recriminations and legal action. However, a well-handled redundancy decision gives greater chance of acceptance, support for the individual and perceived fairness over the decision (both for those staying and those going). We felt that rather than avoiding involvement in redundancy initiatives due to concern over poor practice and potential fallout, OPP had an opportunity to contribute to best practice in redundancy situations.

Please note that this article does not constitute legal advice on the topic of redundancy. There are many other factors to consider in redundancy decisions; this document looks only at considerations to be applied to the use of psychometric assessment. It is not an exhaustive guide on how to handle redundancies, and clients should take their own legal advice on any legal aspects of their own situation.

For further information about the redundancy process as a whole, please see references such as the CIPD fact sheet on redundancy:

http://www.cipd.co.uk/subjects/emplaw/redundancy/redundancy.htm

or the BERR guidance on redundancy (BERR is the UK government's Department for Business Enterprise and Regulatory Reform):

http://www.bis.gov.uk/assets/biscore/employment-matters/docs/06-1965y-redundancy-consultation-guidance

Types of Redundancy Situation

Before outlining the suggested OPP approach, here is an explanation of the two most usual redundancy situations.

**Elimination of a role** – Where the organisation considers that a particular role is not viable anymore and has a business case to support this. A potential example of this is where an entire department (e.g. facilities or IT) is outsourced to an external agency and so the organisation has no need of internal roles.

**Reduction of number of positions** – This potentially the most common cause of redundancies, particularly during an economic downturn, and occurs where the organisation decides it cannot support the existing number of positions within a certain role. For example, due to reduced opportunities it decides to reduce the number of sales managers from 20 to 10. Again, the organisation must have a clear business case to justify this reduction.

*(NB - Performance Management - This is where a particular individual is not performing according to the requirements of the role and so a performance management process is put in place. This would involve the organisation initially working with the individual to try to improve performance (e.g. through further training, mentoring etc). If the performance criteria are still not being achieved after a defined period of time, the individual may be asked to leave the role. This is a performance management situation and not redundancy and so is not specifically discussed by this article.)*
The OPP Guide to Using Psychometrics for Redundancy

This section outlines when OPP feel that psychometrics can be used ethically and fairly in redundancy decisions, and where we feel that their use cannot be justified.

1. Situations where psychometrics should not be used:

In the following six areas, OPP would not recommend the use of psychometric instruments:

- When the psychometric instrument being considered is only suitable for developmental purposes.
- When there is much stronger evidence already available for deciding which staff will be made redundant.
- When the role is unique to one individual.
- When a redundancy decision has been made already.
- When the psychometric information is out of date.
- When the psychometric information was initially collected for a purpose irrelevant to the new role.

These are explained in more detail below.

1.1. When the psychometric instrument being considered is only suitable for developmental purposes.

As a general rule – if an instrument is not suitable for selection (recruitment), it is not suitable for de-selection. For example, MBTI should not be used for recruitment; therefore, it would not be suitable for redundancy. It does not give specific enough information on how an individual might be suited to different types of jobs, or different aspects of a particular job.

Other OPP instruments that we would not recommend for redundancy decisions include:

- TKI
- FIRO-B
- Strong Interest Inventory
- 360 instruments (e.g. Benchmarks).

By contrast, an instrument such as the 16PF questionnaire gives specific information that can be mapped to particular aspects of a job role (e.g. through job analysis). As long as the psychometric assessment can be shown to be relevant to the performance of the role, it could potentially be used to inform a redundancy decision. See “Situations where psychometrics could be used”, Section 2.2.

Please note, some instruments might be used, although not all of their reports would be suitable, e.g. 16PF Profile Report might be used, but the Career Development Report should not.

1.2. When there is much stronger evidence already available for deciding which staff will be made redundant.

Psychometric tests are great for rapidly learning a lot of things that you may not know about a person. In selection this gives a huge benefit – with a psychometric instrument, you learn information that will help you predict unknowns, such as intellectual capacity, skills and behaviours. In de-selection, there should be plenty of other data already available that make these qualities known; for example, performance appraisals, measures of output, feedback from staff and customers.
Where an organisation has robust processes and good records of performance and output etc, it unlikely that psychometric data will be of any incremental value. However, it does not follow that patchy record keeping would justify inappropriate use of psychometrics tests – the correct emphasis would be to encourage clients to keep their processes in line.

1.3. When the role is unique to one individual.

If only one role and one individual is to be made redundant, psychometric tests are unlikely to have any relevance; in this situation, the redundancy is decided on business needs, not on personal qualities of the incumbent.

1.4. When a redundancy decision has been made already.

If there are business reasons to make a role redundant, these should be the stated reasons. Where several existing employees have been identified as a ‘pool’ from which some, but not all, will be offered certain remaining posts, the employer should first establish the criteria for selection, and then consider the candidates against those criteria. In some circumstances, such criteria may include the use of a psychometric instrument (see Section 2.2), but psychometric tests should not be used as a retrospective justification for a decision that has already been made. ‘Fishing’ for evidence in the psychometric tests is not appropriate.

1.5. When the psychometric information is out of date.

For example, if the results are more than 12 to 18 months old, these should be considered to be out of date

1.6. When the psychometric information was initially collected for a purpose irrelevant to the new role.

For example, if the psychometric assessment was done for a purpose irrelevant to the role – such as recruitment to a different role from the one that the individual currently holds. Any information considered in redundancy should be relevant to the individual’s capacity for performing in the future role.

Note that in addition, the use of test or questionnaire results for a purpose other than that for which they were originally intended may contravene the provisions of the Data Protection Act.

2. Situations where psychometrics could be used:

The following 2 areas are ones where an ethical use of psychometric instruments may be possible:

- In outplacement counselling.
- When redundancies are being handled in a ‘select-in’ situation.

These are explained in more detail below.

2.1. In outplacement counselling.

Once redundancy decisions have been made, psychometrics can be very useful in outplacement advice. In this situation, psychometric assessment may not have had any part in the redundancy decision; however, psychometric instruments may be used afterwards to help the individual consider their next options.
Personality and ability information can help the individual and potentially a career counsellor to consider the most suitable employment possibilities. For example, the MBTI tool can help an individual understand themselves better, and therefore consider where they would most like to invest their energies and make use of their natural style; the 16PF Career Development report could help people to consider what kinds of jobs might appeal to them. Other developmental instruments, such as the Strong Interest Inventory, could help the individual to identify new occupational opportunities worthy of consideration.

2.2. When redundancies are being handled in a ‘select-in’ situation.

This is most likely to occur in a restructure, where there are fewer new jobs available than there are existing employees.

Please note: this scenario presumes that the available jobs are truly new. This is not simply an exercise in reducing numbers, or reapplying for a currently held job; it is applying for new roles with new tasks and responsibilities. (If, however, the employer is simply choosing, say, three out of five people to continue in existing roles, then existing data about their performance in those roles should be the best evidence. See Section 1.4.)

Where selection into new jobs is concerned, this may be fairest by applying consistent pre-determined criteria to all candidates. Psychometric assessment may help to predict future performance fairly, particularly as the role is new and the candidates have not undertaken this role before. This will mean that candidates are assessed on their likely performance in the role, not on irrelevant assessment of past performance in a different role. It would put all candidates on a ‘level playing field’; where there is a possibility of bias in decision-making (e.g. managers favouring their own direct reports for new roles), then an objective measure may make the decisions fairer.

In this situation, the best candidates for the future roles are selected; those not selected are therefore considered for redundancy. The assessment is focused upon selecting in, not deselecting.

Points to note:

It is worth remembering that this scenario would be a high-stakes situation, just like any other selection situation; therefore it would be worthwhile to be alert to signals of distortion (e.g. social desirability on personality assessments or cheating on aptitude tests). As with other selection situations, other information should be used in conjunction with the psychometric information (e.g. interview, work sample tests, group exercise); use of psychometrics alone would be unsuitable.

Do Managers Need to be Conscientious?

Dr. Hugh McCredie – TPF Vice-Chair

Previously (McCredie, 2010a, 2010b) I explored whether managers needed to be extraverted and stable and concluded that both traits helped managerial effectiveness. We now explore whether managers should also be conscientious.

What is conscientiousness?

Woods and Hampson’s (2005) single item Big Five conscientiousness measure reads:
Someone who likes to plan things, likes to tidy up, pays attention to details, but can be rigid and inflexible.

Cattell’s 16PF Form A second order ‘control’ equivalent has two narrowband components:

Conscientious, conforming, moralistic, staid, rule-bound
Following self-image, socially precise, compulsive

Dudley et al. (2006) meta-analysed dedicated Big Five conscientiousness measures and four narrowband traits (dependability, achievement, order and cautiousness). They concluded ‘that global conscientiousness scores are driven to a greater extent by dependability than by the other three traits’.

What suggests that managers need to be conscientious?
In their UK study of management conscientiousness, Robertson et al. (2000) stated: ‘Some authors have proposed that conscientiousness might be the ‘g’ of personality and predict performance in most occupational areas’.

Are managers conscientious?
Bartam (1992) and McCredie (2010c) reported personality profiles of senior British managers; candidates in the first instance and those selected in the second. Both used 16PF Form A and the latter corrected scores for faking. 16PF Form A second order control has a ‘good’ level of equivalence with 16PF5 ‘self-control’ which, in turn has a good match with NEO PI R conscientiousness (McCredie, 2009).

Bartram’s 1776 managerial candidates had a mean control score at the 73rd percentile whilst my 446 appointed managers were at the 70th percentile. Additionally, inferred scores of 17 high profile CEOs (Petersen et al., 2003) were around the 63rd percentile. Less than two per cent of my sample registered lower decile scores. Surprisingly, the latter included a few high performing, and long serving managers.

Does conscientiousness predict overall managerial performance?
Published evidence is mixed. A large meta-analysis (Barrick et al., 2001) found such a link but a smaller study using only ‘pure’ Big Five measures (Hurtz and Donovan, 2000) did not; neither did a UK paper using OPQ (Robertson et al., 2000). Additionally, I established no link between 16PF Form A control and either ratings of overall effectiveness or level of seniority (McCredie, 2010c). I also tested whether proximity to the mean control/conscientiousness score correlated with performance but, again, found no link.

Robertson et al. asked whether absence of a link with overall performance might be due to OPQ conscientiousness measuring dependability versus achievement; similar to 16PF control. However, the meta-analysis using ‘pure’ Big Five predictors (Dudley et al., 2006) found no support for a global measure of conscientiousness (including achievement items) being any more predictive than narrowband dependability.

Subsequently, I found an interesting study suggesting ‘Highly conscientious workers who lack interpersonal sensitivity may be ineffective particularly in jobs requiring co-operative interchange with others’ (Witt et al., 2002). Interpersonal sensitivity is reflected in Big Five agreeableness, which I intend exploring later. Meanwhile, I can say that both Bartram’s (1992) sample and my own yielded lower quartile mean scores for the 16PF Form A equivalent of this factor. Furthermore, a diary study (Stewart, 1967, 1988) revealed the essentially collaborative nature of managerial work. In such circumstances, extreme conscientiousness may not be helpful.
Do managers need to be conscientious?
Having previously established that both extraversion and emotional stability are desirable managerial traits, I cannot draw a similar firm conclusion for conscientiousness/control.
Axiomatically, we want our managers to be dependable and the majority who survive into senior management display this trait. However, there are low scorers who continue to be successful and probably high scorers who lack the flexibility requisite for most managerial roles. As a rule of thumb, I would be happy to select those scoring between the upper and lower quartiles for this factor. For those who score at or below the 25th percentile, I might seek corroborative non-psychometric evidence to determine whether they are dependable and for those at or above the 75th percentile, enquire whether inflexibility has proven problematic.


Further reading and sources of information:
McCredie, H (2009) Thanks for the Big Five: Now we can talk to each other, Assessment & Development Matters, 1, 1
McCredie, H. (2010a) Do managers need to be extraverted? Assessment & Development Matters, 2, 1, 9-11
McCredie, H. (2010c) Selecting and developing better managers
OPQ (1984) Thames Ditton, SHL Group
Peterson, R. S., Smith, D. B., Martorana, P.V. & Owens, P. D. The impact of chief executive officer personality on top management team dynamics: One mechanism by which leadership affects organizational performance, Journal of Applied Psychology, 88(5), 795-808
16PF Form A (1978) Oxford: OPP.

EDITOR
Adrian Starkey Tel 020 3287 4988
adrian@xl8talent.com

MEMBERSHIP ADMINISTRATOR
Caro Leitzell Tel 01962 880920
admin@leitzell.clara.co.uk