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# Psyche

The newsletter of The Psychometrics Forum



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# A few words from your editor

*Adrian Starkey*



*Adrian Starkey*

Firstly I would like to thank all contributors to the current edition of Psyche. I really do appreciate your efforts in capturing the content of TPF events for the wider membership and recognize the time commitment involved. For other contributors with a point of view or product to promote, I am delighted that you have chosen to do so on the pages of Psyche and grateful for your efforts in balancing the content and the commercial messages. Following initial distribution to full TPF subscriber members Psyche is promoted via our web-site to over 5000 on-line LinkedIn affiliates from around the world – Your words are getting out there.....

I expect that many of you will have attended our 25th June event where you will have heard contrasting presentations from two very distinguished speakers Dr. Rainer Kurz and Professor Paul Barrett. Rainer on 'The Structure and Dynamics of Personality, Ability & Competency Assessment' and Paul on 'Beyond GMA: Cognition, Cognitive Processes, & the Cognitive Process Profile (CPP)'. Sadly I was not able to be there personally, but look forward to reading about what was discussed as the copy comes in for the next edition of Psyche.

On the horizon in September is what promises to be another highlight of the Forum's year for an event that we are calling 'Illuminating the Dark Side'. Here we will be welcoming back Prof. Bob Hogan originator of the Hogan Development Survey (HDS). Also speaking on the day will be Andrew Munroe who will be providing some historical context on the assessment of gaps, strengths and risks. Andrew promises some thought provoking commentary on the challenges for future assessment.

For our final event of the year the floor will be given over to TPF's Vice Chair Dr. Hugh McCredie for the New Frontiers event in November. Once again Hugh has assembled a varied and interesting mix of speakers to stimulate our psychometric taste buds – I have included the draft agenda at the end of this Edition of Psyche. Presentations will be followed by an informal early Christmas networking event including mulled wine and mince pies.....

I am also delighted to report that TPF committee members are in active discussions with a number of test publishing companies with a view to offering discounted programs to fully paid up TPF members in 2015 and beyond. This is a clear win-win arrangement and an exclusive benefit of TPF

membership. More information will be shared as it becomes available.

Just in case you are not already a follower, I would also like to draw your attention to the excellent blogging work from our colleague Raj Chopra. Over the past couple of years he has built up an impressive back-catalogue of postings, including his most recent related on the psychology of effective negotiation:

<http://www.psychometricsforum.org/fresh-perspectives-on-psychometrics/>

Finally, I would like to take the unusual step of plugging a book. I am sure that many of you will remember the excellent work of Psyche's previous editor David Roberts. David has not given up the keyboard and has recently published a new book called **What More Can I Say?** The book consists of stories, journalism and articles that he has written over a number of years.

It is published by LULU and will also appear on a number of other sites: Lulu Bookstore, Apple iBookstore,

Amazon Kindle & Kobo. It is published at £3.99. This price includes a donation of 50p to the Lymphoma Association that helps those suffering from lymphatic cancer.

Rather than try to offer a further summary of what you will find in this edition I will let their articles speak for themselves.....

## Copy deadlines 2014

**Autumn** – Wednesday 8th August 2014

**Winter** – Wednesday 5th November 2014

To book a place on any of the events please contact our Administrator

**Caro Leitzell** on **01962 880920** or email her at

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# Heroes, landmarks and blind alleys in personality assessment –



Dr. Hugh McCredie

## 4. The later psycho-lexical trait studies and the emergence of the Big Five

### *Dr. Hugh McCredie – TPF Vice Chair*

#### **The story so far**

The second article in this series ‘Early implicit measures and the first psycho-lexical trait studies’ took us to 1946. By this time, Raymond Cattell had reduced Allport & Odbert’s 4505 dictionary trait terms to 35 ‘surface trait’ clusters then, by factor analysis, to 12 mainly oblique (inter-related) ‘source traits’. He had added a further four factors, emerging from the analysis of an exploratory questionnaire, to give his sixteen personality factor (16PF) model. He had then analysed source trait scale scores from the published 16PF questionnaire and discovered a smaller number of higher order factors, some of which approximated to dimensions of what came to be known as the Big Five model of personality.

#### **Cattell revisited**

**Cattell** (1947) executed a confirmatory study involving 35 surface traits. These traits were not identical to the 35 of his 1946 study. He wrote:

*we attempted to find a purer measure, with higher saturations than any previously found. This is part of an iterative, “distillation” procedure, in which each research profits by the preceding to get closer to the nature of the factor. (p. 200)*

**Fiske** (1949) obtained ratings of subject sub-sets from various sources against 22 personality variables adapted from Cattell’s (1947) 35 surface traits. He found five *recurrent* factors close to those of the subsequent Big Five model. He failed to replicate the source traits reported by Cattell, commenting ‘in Cattell’s study...there are four factors with *no* loadings above .40 and several more with only one or two loadings that high.’ (p. 342).

However, Fiske’s findings were largely ignored and there was little further independent exploration of Cattell’s model until **Tupes & Christal** (1961,1992) sought:

*to isolate meaningful and relatively independent trait-rating factors which are universal enough to appear in a variety of samples, and which are not unduly sensitive to the rating conditions or situations. (p. 227)*

They used ratings, against Cattell's 35 surface traits, from eight samples; the actual data for some of which being retrieved from Cattell's own analyses. In contrast to Cattell's more subjective selection of source traits from amongst his oblique (interdependent) analyses, on one occasion they used a computerised algorithm from which emerged five recurrent orthogonal (independent) factors, listed below in order of the amount of variance explained:

*Factor I: Surgency or Extraversion*

*Factor II: Agreeableness*

*Factor III: Dependability* the main components of which were orderliness, responsibility, conscientiousness, perseverance, and conventionality

*Factor IV: Emotional Stability*

*Factor V: Culture* the least clear of the five factors

**Norman** (1963) raised the bar for factor analysis by subjecting all of his data to computerised algorithms. He sub-divided his 622 respondents/subjects into four samples and used the four of Cattell's surface trait descriptions which Tupes & Christal had found to load highest on each of their five factors; i.e. 20 scales in all. Norman's results gave clear support to the findings of Tupes & Christal. He reported:

*The factor similarity...between analysis [s]amples ... clearly support this impression of relative independence and clear definition of the five personality factors. (p. 580)*

*In [one of the six matrices] only the correlation between Factor II and Factor IV was of appreciable magnitude (.46). In the remaining five matrices various combinations of factors did relate somewhat appreciably, notably II with III, II with IV, and III with V. These results...seem to indicate that some degree of obliquity may exist among certain pairs of the dimensions of personality for which these factor measures have been developed. (pp. 580-1)*

However, he concluded:

*it is clear that a relatively orthogonal and highly stable structure of personal characteristics has been identified... even groups with rather limited histories of interpersonal association...produce a highly similar factor structure. (p. 581)*

The rigour and objectivity of Norman's 1963 study resulted in his accreditation as the author of the five factor model of personality. However, it is the view of this author that his honouring as a hero must be shared with Fiske, Tupes and Christal. Their work built on that of Cattell but raised questions as to the replicability of the source factors which he extracted from the data, given some low loadings and his rather idiosyncratic location of these in factor space.

### **Lewis R Goldberg**

Wikipedia introduces Goldberg as 'an American personality psychologist and a professor emeritus at the University of Oregon who is closely associated with the Big Five taxonomy of personality (he coined the term "Big Five")'. Notwithstanding, his accreditation with the labelling of the model, Goldberg is emphatic that its discoverers were those referred to above and it is the literature reviews preceding Goldberg's own contributions which alerted me to the most important staging posts in this history.

An early contribution (Goldberg, 1981) explored the nature of the relationship between personality and everyday language. By the standard of psychometric papers, this piece was highly literate and its tone occasionally borders on the rapturous:

*Dimensions which are mutually orthogonal are very lovely... [but] they are grossly unrealistic. For, in any natural language, there are terms to describe individual differences that are at varying levels of abstraction and/or at varying degrees of generality... This makes it look as if an optimal structure must be capable of unfolding in some kind of a hierarchical fashion, with very specific attributes being combined into ones which are more general... This kind of structure implies oblique dimensions of personality (p. 155)*

*it hardly matters what number of factors are extracted, since the loadings on the first five factors are always nearly the same... Clearly, there is something to this structure. It is not simply a matter of extracting a particular number of factors or using a particular type of rotational algorithm. These are data speaking for themselves. .. (p.160)*

Goldberg (1990) explored whether the Big Five factors were simply a product of Cattell's 35 surface traits being used as the starting point by subsequent researchers. He reported original dictionary

research by Norman (1967) which had produced 1431 unambiguous trait adjectives clustered into 75 categories. Using the scale scores from the 75 categories, Goldberg was able to extract the Big Five factors using both orthogonal and oblique algorithms for each of five common extraction methods. In two subsequent experiments he reduced the bank of necessary trait adjectives to 339, whilst increasing the clusters, with which they were associated, to 100. Analysis of the 100 cluster scores yielded a clear Big Five structure.

Having discovered that his 100 cluster scores could produce a good Big Five result, Goldberg (1992) experimented to identify a similar number of single adjectives which might serve equally well. He reported:

*The cumulative pattern of findings across... three studies suggests that relatively small sets of variables can serve as markers of the Big-Five. Moreover...variables administered in unipolar format appear to be more robust across samples. (p. 32)*

By unipolar, Goldberg meant that the adjectival traits were not presented alongside their antonyms. In the last of his series of four experiments, he found a high correlation ( $r = 0.86$ ) between the Big Five resolution of his 100 adjectival 'markers' and that from his 100 clusters as well as an average  $r = 0.60$  with NEO PI Costa and McCrae (1985) approximations. He concluded:

*It is to be hoped that the availability of this easily administered set of factor markers will now encourage investigators of diverse theoretical viewpoints to communicate in a common psychometric tongue. (p. 39)*

These are heroic aspirations on the part of Goldberg. Subsequent articles will report on his further contributions, to Circumplex models of personality (No. 6) and, in the concluding article, to his foundational work in launching the International Personality Item Pool (IPIP) in the public domain.

### **Paul Costa & Robert McCrae**

Alongside these psycho-lexical studies, two American psychologists with an interest in gerontology involved themselves in a study of the effects of aging on personality which led to the development of the most widely used proprietary measure of the Big Five factors and their facets.

Costa & McCrae (1976) wanted a tightly defined personality structure to assess the relationship between personality and aging so they used cluster analysis whereby the lower level variables can only be assigned to a single cluster. Their analysis of 16PF Form A plus Form B data revealed only three clusters (p. 569):

*Cluster 1: the anxiety cluster includ[ing] maladjustive emotional responses of various kinds like anger and depression, as well as nervous tension and fears. Interpretively, this dimension shows more correspondence to the broader neuroticism concept of Eysenck (1960) than to the more specific trait anxiety concept.*

*Cluster 2: the Introversion-Extraversion cluster. While corresponding to a comparable dimension in Cattell's (1957, 1970) and Eysenck's (1960) writings, Cluster 2 appears to be primarily a dimension of sociability of affiliation.*

*Cluster 3: Subjects high on the third cluster are characterized by an openness to experience while those low are characterized by closedness or narrowmindedness.*

The three clusters, subsequently labelled Neuroticism (N), Extraversion (E) and Openness (O), respectively, formed the basis of the NEO model of personality. The first NEO measure was published in Shock et al. (1984). Two more factors emerged from this data: Agreeableness (A) and Conscientiousness (C), so that the Big Five model was supported from a source that was not strictly lexical. The following year saw the first published manual for the NEO, which included all five factors and included six facet sub-scales for the three original factors. It was against this that Goldberg (1992) validated his markers. In 1992 Costa and McCrae published a Revised NEO manual which included six facets for each of the five factors/dimensions.

NEO is the pre-eminent dedicated Big Five measure and, as such, must stand as a landmark in the history of personality assessment.

The next article in this series will examine the contribution of the experimental psychologist Jeffrey Gray which started with an exploration of the physiological underpinning of Eysenck's extraversion factor.

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Gemma Smith

# Digital psychometrics: personality assessment in the social media & big data era

TPF Event, 2nd April 2014

*Tomas Chamorro-Premuzic's  
presentation (Professor of Business  
Psychology at University College  
London (UCL), Vice President of  
Research and Innovation at Hogan  
Assessments)*

*by Gemma Smith – Consultant, Saville  
Consulting Ltd.*

The first session of the day, presented by Tomas Chamorro-Premuzic, reflected on the relationship between technology and personality. As a self confessed technophobe, and still relatively new to my career in psychometrics, I was intrigued, along with many in the room, to understand more about 'how this synergy (between technology and personality) is advancing our ability to predict, understand and influence behaviour'.

This topic is one that Tomas is clearly passionate and knowledgeable about, as he was able to share an array of facts and figures regarding the 'technosexual economy'. I wasn't aware for example that the market value of new technologies companies such as Apple, Google and Facebook dwarfs that of the world's other globally successful organisations including Disney, News Corp or CBS; or that there are more iPhones sold per day (400k) than human births (300k). How many of us check our smartphones as the last thing we do before going to sleep, or the first thing when we wake up? I know that I am certainly guilty of this and therefore contribute to the 60% of us reaching out to their phone when they wake up, according to Time Magazine in 2013. Love it or hate it, our love affair of the smartphone appears to be here to stay: 'It is the dominant technological item with which young people define themselves. What sort you have, how you handle it and how you customise it says a great deal about you. You may even have more than one: a commuter workhorse for use during the week, and a sportier model for the weekend. Your car? No, your mobile phone. The similarities between the two are striking – and informative', according to The Economist.

Perhaps one of the most shocking statistics for me, beyond the fact that 35% of toddlers have smartphones, is that 90% of online data ever generated has been created in the last two years. And it is this digital footprint that each of us is leaving behind that is of interest to those profiling potential customers. It is well known that marketers are using customer analytics to profile our shopping habits and therefore target their advertising and offers. But questions are now being asked about whether such data might even predict our personalities.

Algorithms are already being developed which link Big Five factors with social media: for example TweetPsych provides a report of your personality based on qualitative text mining of your Twitter feeds. Research so far suggests that openness and extroversion are relatively predictable (in the region of .40).

So could these technologies be applied to recruitment? There has certainly been a rise in the use of social media for recruiting. The 2012 Social Recruiting Survey reported that 95% of recruiters are using LinkedIn, 66% have used Facebook and 54% are using Twitter to find new talent. Tomas' view was that the possibility is not far from becoming a reality, particularly as current estimations are that overall, the validity of personality prediction from social media data mining is about 50% of what it is possible to achieve via personality psychometrics. As practitioners we will need to give consideration to the ethical and legal implication of adopting these methodologies – something Rob Bailey discussed in the afternoon's session.

If gamification (the use of game thinking and game mechanics in non-game contexts) and the uptake of multi-media Situational Judgement Tests is a look into the future of the merging of technology and recruitment, I can begin to see the appeal. It could offer more varied ways of engaging potential employees, a fun and quick way to assess applicants, and potentially a cheap and efficient way to assess large numbers of candidates. Considering that in ten years' time, 46% of workers in the US will be millennials, defined in part through an obsession with both themselves and technology, the psychometrics industry will clearly need to consider researching and developing more innovative ways of assessment and recruiting.

## *Rob Bailey's presentation (Principal Consultant, OPP Ltd)*

*by John Jackson – Fusion Leadership*



*John Jackson*

### **Introduction**

This session followed some earlier discussions about emerging, leading edge practices in the use of advanced algorithms and ready access to 'Big Data' to enhance personality assessment and some of the practical applications that might stem from this. By contrast, this practical session focused exclusively on the increasing use of social networking sites by many employers in what seems to be an ill-considered and risky way. In many respects the social media sector appears to be pretty much a 'wild-west', unregulated and somewhat anarchical environment. And yet some employers are managing to convince themselves that they can access useful and reliable data from such sources. This problem is compounded by the absence of much in the way of guidance for managers on using social media data.

This session was structured around five broad topic areas:

1. Defining Social Networking Sites (SNS's)
2. Employee concerns
3. Employer issues
4. Overt and covert use of SNS
5. Recommendations

### **1. Defining Social Networking Sites**

While there are some well-recognised SNS's in operation, including Facebook and Linked In it is difficult to come up with a definition that effectively covers all SNS's. However, there look to be some features that are common to most SNS's. These include:

- The content is user-generated and self-published.
- Where SNS is permitted there is minimal censorship on what can be posted.
- The sites are networked so that content is openly and immediately shareable.
- Most of the material that is posted is open and accessible.
- Being web-based, SNS are accessible through an increasing array of devices including PC's, laptops, phones and tablets.
- SNS's can host a wide range of media including music, video, blogs, journalism, news, books, photography, spoken word, reference, discussion groups, etc.

These common features point to a veritable cornucopia of material about individuals that is simply 'out there' and easily accessible to view. Given this, it is not surprising that some employers are already actively tapping into SNS's as part of their recruitment and selection processes. They are doing this because they see an SNS search as quick, cheap and effective, and somehow as providing an accurate insight into an applicant's personality. They are also able to look for likely candidate fit with the company, and they can check qualification claims and any anti-social or inappropriate behaviour.

## 2. SNS and employees' concerns

The main concerns that existing employees look to have with regard to their employers making either covert or overt use of SNS sites is in relation to possible disciplinary actions, including dismissal. This creates significant legal and ethical questions as to how far an employer's rights extend into an employee's personal life and their on-line SNS posting.

For potential employees, applying to join an organisation, research suggests that ill-considered use of SNS screening can again have significant ramifications for the way applicants perceive both the selection process and the organisation itself. Two studies by Stoughton et al (2013) indicated that the use of social networking website screening caused applicants to feel their privacy had been invaded, which ultimately resulted in lower organizational attraction. The first study also showed that applicants low in agreeableness had the most adverse reactions to SNS screening. In the second study it was found that the organization's ultimate hiring decision - irrespective of whether this was positive or negative - did not moderate the relationship between screening and perceived justice. The second study also indicated a greater willingness for applicants to resort to litigation where the potential employer had used SNS screening. A study conducted by OPP in 2011, combined 16PF data and results from an additional survey to produce some interesting findings. Amongst other things, the study pointed to significant gender differences with females spending significantly more time using social media than males.

Certain personality traits appear to be linked, either positively or negatively, to higher SNS usage. Within 'Relating to others' both Warmth (attentive to others)

and Social Boldness (socially confident) were positively correlated, as was Liveliness (energetic & exuberant). By contrast, both Self-Reliance (team-oriented) and Privatness (willing to self-disclose) were negatively correlated.

Within 'Thinking style' as many as four factors correlated positively with higher SNS usage. These included Warmth (takes account of feelings of others); Sensitivity: (emphasises subjectivity); Abstractedness (takes a broader view, reflective) and Openness to Change (open to new experiences and change). Other factors to correlate negatively included: Emotional Stability (less calm than most) and Rule-Consciousness (less bound by rules).

When it came to online privacy as many as 43 % of subjects were only slightly concerned when putting personal information on social networking sites. Those showing less concern tended to:

- Exhibit a more unrestrained style.
- Show greater liveliness and be more spontaneous.
- Exhibit more abstractedness; be more reactively focused.
- Show less rule-consciousness and less bound by rules.
- Be less perfectionist and less concerned with planning.

People with lower concerns about online privacy were also lower in vigilance, and hence more tolerant of others; they exhibited less apprehension and hence might be seen as less self-critical; and, perhaps significantly, were lower on privatness, and consequently more willing to share information.

More generally, almost two-thirds of people (63 %) stated that they would not change their posted character when online. Perhaps this is understandable when it is considered that, of those who use social networking sites, as few as 9 % believed that their presence on these sites had ever compromised their professional reputation.

OPP also asked how comfortable people would feel if someone interviewing them were to research their presence on social networking pages. They found that:

- 27 % were not comfortable
- 26 % were somewhat comfortable
- 28 % were comfortable
- 19 % were very comfortable

Interestingly, and perhaps also rather contradictory, 11 % of people stated that they would personally be 'likely' or 'very likely' to look at an interviewee's SNS information, but they would NOT be comfortable themselves with an interviewer looking at their own SNS information.

In summary, the main concerns for existing employees regarding SNS screening is that their organisations may use SNS data to initiate disciplinary proceedings of some form against them. For potential employees the views are perhaps more subtle, but also significant in the way they may perceive the organisation they have applied to join. Here the use of SNS screening may mean:

- Candidates can find SNS searches an invasion of privacy.
- It undermines their opinion of the organisation.
- It increases their wish to sue.
- Many individuals have an alter-ego online.
- More risk-taking traits lead to more sharing online.

### **3. Issues for employers in using SNS**

Research suggests that at least a third of organisations may now be using SNS sources to inform recruitment and selection decisions in some way. In some industries the use is significantly greater, e.g. the oil and gas sector. Recent research reveals the prevalence of SNS use:

- CIPD (2013): 33 %
- Career Builder (2012): 37 %
- Spon (2010): 77 %
- Oilandgaspeople.com (2013): 82 %

Perhaps even more significant than the extensive use being made of SNS sources in some sectors is the reported level of decisions to reject candidates on the basis of SNS searches. From the same research quoted above decisions to reject were found to be:

- Career Builder 34 %
- Oilandgaspeople.com: 64 %

This evidence suggests that in certain sectors significant numbers of employers are using access to unregulated and largely user generated SNS data to seriously inform their recruitment and selection decisions. And, in the case of the oil and gas sector almost two thirds of candidates are being rejected as a result of postings on their SNS profiles.

It is also clear that, in the absence of any guidelines, the material posted on SNS's is open to widely differing interpretations by the reviewer. Pictorial material, especially where the subject appears suffering the effects of drink or drugs, seems certain to be perceived negatively by any employer who is using SNS screening to assess "likely candidate fit with the company" even though the material concerned may have been posted in an entirely innocent, private and unguarded way. It is interesting to note that a recent study Chad Iddekinge (2013) suggested no demonstrable relationship between a person's estimated employability from SNS postings and subsequently reported job success.

A study by Bertrand and Mullainathan (2003) looked at the use of CV screening in candidate assessment. They found that, even with CVs identical other than for the names of candidates, there were 50 % more interview offers to candidates with names such as 'Greg' and 'Emily' compared with 'Lakisha' and 'Jamal'. This was irrespective of industry, role, size of company or whether they professed to be Equal Opportunities Employers.

A general theme across a number of studies is that discrimination is found to intensify when judgements are made secretly and in private, rather than in some openly declared and auditable process. Clearly this discrimination risk is much more likely to apply in discrete social media searches than in a clear, documented process for CV sifting.

### **4. Overt and covert use of SNS**

The way in which employers are accessing SNS data also varies from organisation to organisation. For some the approach is covert: with the employer secretly looking up information about individuals without any open reference to the individuals concerned. Many people would see this as a form of spying.

For other employers the use of SNS is more overt. Here the employer is openly declaring the use of SNS sites and data. However overt use like this looks to be less concerned with recruitment and selection and more to do with employee engagement and promotional activities for the company.

In some extreme cases it has been reported that companies have resorted to forms of 'overt spying' on individuals. They are doing this by asking – or even compelling – existing employees to provide their Facebook logins as a way of accessing data on their

network contacts; or using the HR function to discretely 'friend' the individuals concerned on Facebook.

The conclusion here simply has to be that there are serious risks for employers where they resort to using SNS screening in an ill-considered way. Amongst the most serious concerns are:

- Data available on SNS sites may not be accurate in that:
  - The online information is simply wrong, or
  - The employer's judgements about the data are wrong, or
  - A combination of both of these
- SNS data, taken at face value can lead to poor decision making, with consequent implications for the company
- Applicants generally don't like their SNS data being accessed for selection purposes
- There is a serious risk of discrimination and law-breaking

## 5. Guidance and Policy

A good starting point here is to remember this is just a new media channel through which data should - or should not be accessed to aid selection decision-making. Given this, many existing policies and safeguards that organisations have in place may well continue to apply to SNS screening. In short, the same standards should apply as those for other modes of assessments. Key questions that need to be asked include:

1. Is it fair?
2. Is it valid?
3. Is it reliable?
4. Have you documented the process?
5. Will you tell candidates what you will look at, what is expected and what information is to be used?
6. Is there a policy?
7. What constitutes a reason for screening out?
8. How long does an SNS 'offense' stay current?

Guidance published by the CIPD echoes this approach and suggests:

- Respecting the same restrictions that apply to offline checks (for example interviews) in relation to discrimination.
- Taking reasonable steps to ensure the accuracy of information accessed online.
- Distinguishing between social media for mainly

private purposes and social media for mainly professional purposes. So the use of LinkedIn might be considered legitimate, but Facebook more questionable.

- Personal data may be accessed insofar as it is relevant to suitability for the role and relates to candidates' personal capabilities and skills, education and experience.
- Social media searches should be used to look for specific information and not as a general trawling exercise.
- Social media searches should be carried out as late in the recruitment process as reasonably practical.
- Applicants should be informed at the outset if online sources may be used to collect information about them.
- Information generally available online (for example through Google) can be used. However, employers should collect no more personal information than is needed, and should not collect information that is irrelevant or excessive.
- Applicants should be given an opportunity to respond to material findings from online searches, where the findings form part of the decision-making process.
- Personal data collected during the recruitment process should not be kept for more than two years where the applicant was not hired.
- Employers should develop a clear policy towards the use of social media for recruitment purposes, in consultation with employees or their representatives.

In conducting pre-employment checks the CIPD also suggest employers should aim to:

- Protect the organisation
- Protect clients and customers
- Be fair to all candidates
- Ensure non-discrimination and compliance with data protection law
- Rely on fact, not opinion
- Validate information to be relied on
- Ensure relevance to the post to be filled
- See the candidate in the round
- Be transparent and open to candidates about the checking process.

## Conclusions and Recommendations

The overall conclusion here is that SNS's are not naturally respectful of privacy, reputation and control. Furthermore the content is user-generated and self-published with all the implications this holds for reliability and validity.

Given this, both employees and employers need to take care in their use of SNS's. Employees need to consider carefully what they post onto their pages and the use that may be made of those postings. Employers need to consider carefully what their own approach and policy should be to accessing data on SNS's and the use that is to be made of such data.

The broad recommendations that flow from this are:

1. Employers should ban pre-employment searches of Facebook, have clear guidance for what can be searched on Google for candidates, and should have considered approaches to the use of LinkedIn.
2. Candidates should lock down their Facebook privacy settings in any event.
3. LinkedIn, given its leading reputation as an SNS for professional, rather than personal purposes, should be used openly and professionally by employees and employers alike.
4. Employers should give careful thought to how their existing policies should be extended to cover SNS use. In particular, they should consider how existing policies of gross misconduct and bringing the organisation into disrepute cover SNS use.

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# A spark of personality:

An account of the recent TPF members-only qualification training provided by Lumina Learning at University of Westminster, London.

*by Paul Harris - Director, Health Psychology Ireland.*

Recently, I was privileged to be a participant on the qualification course in the Lumina Spark instrument from Lumina Learning. For some background see Harpal Dhatt's excellent overview in Psyche 69. Here, I aim to give a brief account of Lumina's training, and some elements I found compelling.

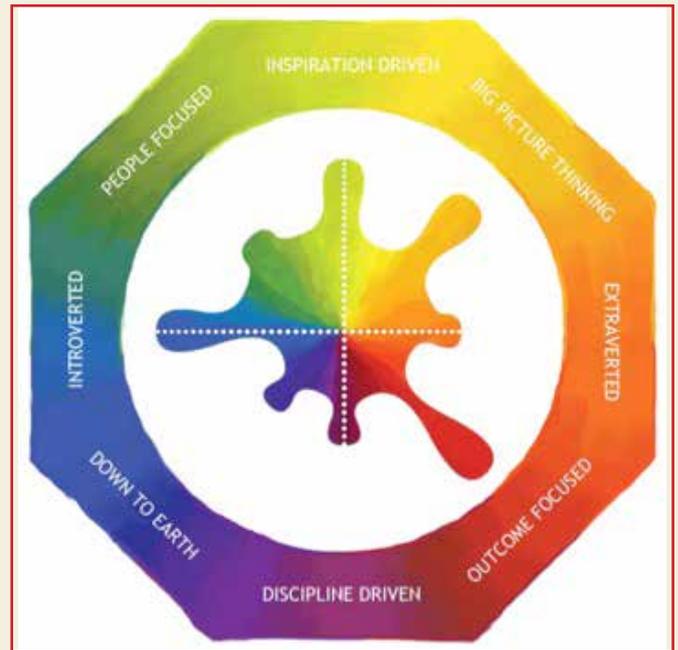
As an independent practitioner I have completed several psychometric training courses. Occasionally, senior consultants from the instrument's company attend, often just to introduce the training sessions. I was pleasantly surprised however when none other than the originator of the instrument and CEO of Lumina Learning, Stewart Desson, not only introduced the first day's session, but also facilitated the entire two days' training. This added much credibility for me as a first timer seeing the instrument in practice, and Stewart and his experienced colleagues (Julie, Tom and Anna Marie) were well able to answer questions from all quarters.

Ahead of the training, all 13 participants had completed the Lumina Spark questionnaire, and in the room were placed for each participant branded bags containing high quality training folders and materials along with our individual profiles (called portraits). Eyeing these bags eagerly, there was a chance that we might ignore any early presentations from Stewart and jump into the shiny folders, to become consumed with our own portraits.

That distraction was deftly averted by an even bigger, brighter, shinier object for us in the form of a large colourful linoleum mat which dominated the floor space, around which our chairs were set in a semi-circle. This – the 'mandala' mat – is one of Lumina's key learning tools. It clearly displayed for everyone the central concepts of the Lumina Spark, as well as introducing us to the colourful, circular representation of dynamic personality embodied by the Spark model.

When we did get to the folders, they were a refreshing departure from typically seen qualification materials. For an emerging tool in the market, the tactile high quality of the printed material was impressive. Clearly delineated sections demonstrated well thought out graphic design, supporting key learning points with consistent and memorable colour coding, light, sharp typography and in non-technical but exceptionally sensible and communicable language.

The day began with an icebreaker exercise involving Lumina Spark cards which summarised key personality characteristics. We were encouraged to recognise from the cards aspects of others and ourselves in the room, and to share this by distributing or holding onto relevant cards and then discussing. We also offered brief introductions and shared what we hoped to get from the training.





Stewart Desson, Tameron Chappell & Nikita Mikhailov

Day one provided hands on experience of understanding the Lumina Spark model, the tools, and how to run training sessions ourselves. I was impressed with the materials Lumina provided, which also included a packed USB stick containing all the ppts, pdfs, binder materials, style guides, sample portraits, case studies, right down to Lumina's marketing materials, fonts and logos.

By the end the day, we were familiar with the key concepts of how personality is represented in Lumina Spark, the 4 colours, the 8 aspects and the 24 qualities. Furthermore, Spark elegantly represented the dynamic nature of personality by explaining how each of us has three Personas: our 'Everyday' self, our 'Underlying' self, and our 'Overextended' self. This had a compelling 'good science' simplicity to it, borne out of a clear systems approach to personality which, instead of competing with or supplanting other models, accommodated their strengths, and then added to them new thinking.

The training consistently emphasised fundamentals of the model, but while the psychometric properties of the tool were discussed, this was not done at the expense of understanding the tool's practical utility. That said neither was the psychometric detail brushed under the carpet. The follow up from Lumina was excellent in this regard, with comprehensive detailed results of recent validity studies quickly provided by Julie Ensor (Lumina's Business and Research Psychologist) via email.

Day two saw us getting in to the practical interaction with the model. We learned how to draw each other's Mandala and Splash (the 'fingerprint' of our personality as represented by the Spark model). We were shown ways in which the model builds on useful elements of Jungian psychology and connects to traits from the Big 5. It also became clear how, if desired, Spark can be easily integrated with existing assessment and development tools – an approach which sensibly accommodates rather than excludes.

Throughout the day Stewart shared with us many examples from his own work experience of how Spark could anticipate and explain workplace behavioural interactions. We were encouraged and shown how to internalise our own stories for each of the 24 qualities. We all participated in several exercises, which helped our understanding of the nuances of interacting with people with different personality dynamics. We also had additional opportunities to break out in groups to conduct one-to-one mini-facilitation sessions using the Spark model.

We were shown practical, clearly communicable structures (e.g. 'GIFT' and 'GROWS') to use in coaching, goal setting and facilitation work. Spark adeptly accommodated successful extant models of feedback such as Albert Ellis's ABCDE model from the REBT domain.



A good time being had by all

Towards the end of the training we used the 'GROWS' model ourselves to identify our next steps in using the instrument. As an assist, Lumina generously offered us several free uses of the entire system from online questionnaire to report generation.

Since the training I have completed one facilitation session using Lumina Spark. The most notable experience for me was how my client – someone with very little experience of psychometric assessment or feedback – readily understood the language Lumina Spark uses to describe personality. After a single two-hour session, this person already has an insight into understanding particular workplace behaviour, and has begun to develop powerful personal goals.

The balance between the requirement for standardised training, and desire to facilitate the diversity of practice and learning styles among participants, was well managed by the Lumina team. As we progressed, Stewart was mindfully flexible enough to adapt each day's agenda in response to the group's experience

and live feedback. This in itself helped to bring to life several aspects of the Spark model, which made for interesting discussions along the way.

If I were to offer some constructive criticism it would be around delays in delivering some aspects of the follow up, which would be expected from a qualification course. My experience of this specifically related to (1) receiving the qualification certificate (2) getting our practitioner accounts set up. However these are minor details in what was otherwise an excellent and generous two days' training, well worth my time.

Lumina Learning - definitely a company to watch - has adopted an innovative approach to personality assessment, explanation and training. Their method is designed not just to 'train people up' to use the tool, but rather to inspire people to resonate deeply with the model, and give them the materials they need with the aim of creating product champions. Lumina Spark is a welcome and disruptive presence in what has for some time been a mature and saturated market.

# Building Teams in the 21st Century: New Challenges, New Solutions



Roy Childs

*by Roy Childs – Team Focus Ltd*

Increasing competition, globalisation and modern methods of working create new problems for OD professionals. We all know the critical issues: a world where change is accelerating; where the top 10 jobs today did not even exist 10 years ago; where we need to prepare students for jobs that don't yet exist, using technologies that haven't been invented to solve problems we don't even know. The cartography of the 16th Century is no longer adequate for the SatNav age; so too, the pre-internet psychometrics no longer meets the demands of virtual, cross-organisational and multidisciplinary teams. Many OD professionals are using out-of-date models and tools. This article suggests why we are in this situation and what new tools can help us face these challenges.

## **The old psychometrics – conflation and confusion**

In our increasingly connected but competitive world, there are huge interdependencies requiring a much higher level of collaboration. Important questions have been sidelined and by-passed such as *'Why am I so different at home and at work? Is it OK for me to behave differently in different teams? How can I adapt to roles that do not suit my preferences?'* These are particularly important for those who recognise the great potential for people to grow, change and adapt. Not addressing them has led to some remarkable confusion.

In the 20th Century the concept of a 'Team Role' became very popular – and the word *'role'* had a clear meaning which is 'a person's behaviour in a particular context'. This differentiates it from *'personality'* which was a general tendency to behave in a particular way across different contexts. However, the most popular Team Role model – Belbin's – confuses the two. It purports to measure *roles* by asking people questions of a general nature such as 'What I believe I can contribute to a team' and 'I gain satisfaction in a job because'. Do we contribute the same stuff across all teams and contexts? Such questions can only identify a person's generalised team behaviour across very different contexts rather than actual team behaviour. It implicitly adopts a model of a *'team personality'* rather than a 'team role'. This is not just a theoretical confusion, but one that impacts hugely

*"It (Belbin) implicitly adopts a model of a 'team personality' rather than a 'team role'."*

on how such a model is applied and how it affects individuals in terms of how they think about their flexibility to do different things in different teams.

In the latter part of the 20th century there was another trend that affected the development of personality questionnaires. In an attempt to appear more relevant to the world of work, many questionnaires changed from inviting general responses that transcended situations (i.e. how you are in the average of situations) to inviting people to give a contextualised response (i.e. 'how you are at work'). This creates precisely the opposite confusion! Such questionnaires are attempting to measure behaviour in context – which to most people means their role.

*“Such questionnaires are attempting to measure behaviour in context – which to most people means their role.”*

This also creates a difficulty as can be illustrated using an extreme example. Consider The Godfather who could talk caringly to his son about looking after his wife and children whilst the next minute he was planning the elimination of a rival family! Imagine the difference between his 'average of situations' versus 'how you are at work' answers. Questionnaires that invite 'how you are at work' have effectively redefined personality as something that is at least partially contextually defined – which is what we usually mean by 'role.'

The fundamental issue here is that context is important – and the old models have obfuscated some basic but essential concepts. This issue is now hitting mainstream psychology as illustrated by the first chapter of Professor Kagan's new book *Psychology's Ghosts* where he berates psychology for ignoring or devaluing context. If this is a legitimate challenge to general psychology there can be no doubt that it is a legitimate challenge to the old psychometrics. And perhaps we can all put our hand up in recognition of how we can be a little slow to recognise that things have changed.

### **The new Psychometrics – focussing on adaptability**

The solution to this problem is to *deconstruct both the personality and the context*. This may sound complex but in fact sums up some fairly straightforward points:

- People behave differently in different situations and teams
- Personality influences behaviour but so do other factors

- Job demands and cultural expectations exert a significant influence.
- This situation is compounded further by the fact that people may want to behave differently than the way they actually behave.

Rather than lump all of these factors together which creates a paradigm where people can think of themselves as stuck in one personality type or a couple of preferred team roles, we now need new models and new psychometrics to differentiate more clearly between personality and role. This will help provide deeper insights for releasing potential, increasing flexibility, accelerating personal development and enhancing team collaboration.

### **Type Mapping – rethinking the Team Role concept**

The Type Mapping system addresses these issues directly by deconstructing what people actually do (their behaviour), what they should be doing (the contextual challenge) and how their preferences affect their ability to see, stretch and adapt. The philosophy behind Type Mapping is that people are not locked into their own preferences, but can exhibit a wide range of behaviours when they have sufficient awareness and motivation. Hence the model explicitly separates what people actually do from what they prefer – and by adding what the situation requires it allows people the chance and the choice to adapt to their circumstances, thus encouraging greater flexibility and adaptation.

We must also learn to value evidence based models for both their strengths and their weaknesses. Any 'evidence based' model can become out-dated. Consider the limitations of a model developed out of observations of mainly male managers playing an artificial game carried out in the 1970's. Add to this the fact that the concept of a values-led organisation was in its infancy and the psychological work contract was very different and we can immediately recognise the need for updating. Type Mapping fills a critical gap that features more highly in the modern work environment – our motivation. Teams can no longer be expected to show the drive and the energy required to become a truly high performing team without developing its 'why' (c.f. Viktor Frankl's 'A man with a why can endure almost any how'). This element is captured in the Type Mapping role called Campaigning .

Additionally Type Mapping brings practical benefits that can reduce the 'Ricochet Team Effect' (i.e. the bouncing about of the loudest voices and the biggest egos). The eight roles define a sequence from Clarifying to Analysing, Innovating, Campaigning, Harmonising, Exploring, Conducting, Activating. Each role has a sweet spot – a time when that contribution is most useful and appropriate. It can therefore introduce a behavioural discipline or 'decision-making' process.

### **In conclusion**

The 21st Century may currently be viewed as 'The Information Age' but there is an even bigger challenge facing us. With luck, by the end of this century, people will look back and say it was the 'Age of Collaboration.' Collaboration is the biggest challenge we face today. As we face increasing diversity and an accelerating information explosion no single person can hold

both the breadth and depth of information required for the next step. Our research, working practices and relationships must become more collaborative. Only this way can we act as responsible stewards of this planet. We need new and better models for encouraging collaboration which acknowledge people's preferences, motivations and, just as important, their behavioural flexibility. Type Mapping is offered here as one such model .

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