

Psychometrics

User's Guide



Psychometrics

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Contents

Introduction	1
Competency Definitions	3
Administrator Instructions	6
Participant Instructions	7
Best Practices	8
<i>Discussion Templates</i>	
Development Discussion Worksheet	9
Development Planning	16
Building on Strengths	18

Introduction

The *Psychometrics 360* is a multi-source assessment instrument designed by Dr. Ken Meen. The purpose is to provide anonymous, multi-source feedback regarding competencies linked to employee effectiveness. This instrument has been successfully implemented by top-tier national and international organizations within multiple industry sectors, including: mining; oil and gas; petrochemical; manufacturing; construction; health care; law enforcement; commercial; and professional industries.

Although 360° feedback is most commonly provided to leaders, the *Psychometrics 360* is appropriate for employees within all organizational levels and roles. The importance of each competency will be rated for the specific role of each participant, providing a context for interpreting the feedback that is specific to that person. Therefore, reports are personalized to meet the unique demands faced by each participating employee.

Every employee establishes unique relationships with others in the organization, based in part on factors such as authority and role expectations. The *Psychometrics 360* recognizes that people often display behaviour specific to the type of relationship in which they are interacting. To account for these differences, ratings are obtained from people with varied relationships to the participating employees. Therefore, perceptions are obtained based on observations of the employees' behaviour in multiple contexts. Possible sources of feedback ratings include supervisors, co-workers, subordinates, and customers. The feedback provides employees with ratings that indicate how others perceive their work-related competencies within relationships that vary by characteristics such as expectations and balance of authority.

The intended consequences of the *Psychometrics 360* is enhancement of employees' self-awareness, professional development, and performance. People have beliefs about their own abilities and competencies. However, personal insight is limited, biased, and imperfect. The comparison of self- and other-report ratings provide participating employees with insight into how their competencies and behaviours are perceived by others compared to their own beliefs. This information provides greater depth and richness to the information used for developmental and evaluation activities. The comprehensive information and subsequent development can be integral to enhancing employee effectiveness and organizational engagement.

Throughout this guide references will be made to **participant(s)** and **rater(s)**. A **participant** is the person who is receiving the 360 degree feedback. **Raters** are supervisors, subordinates, and co-workers who have been select to respond to the survey to provide feedback to the participant.

General Description

The *Psychometrics 360* consists of two sets of items. First, the importance of each competency for the employee's role is evaluated using 24 items. Each competency is rated on a 5-point scale, ranging from "Not Important" (1) to "Critically Important" (5). These ratings are obtained from the participating employee and his/her supervisor, as they will be acutely aware of the demands of the position. The results of the competency importance ratings provide a position-specific context in which to interpret the results. The employee can determine the strengths and developmental areas on which to focus based partly on the importance of those competencies within the context of the current job role.

The *Psychometrics 360* also contains 125 items that describe behaviours associated with each of the 24 core competencies. Respondents rate each item to indicate how often the participating employee engages in the behaviour. The ratings occur on a 9-point scale, ranging from “Not At All” (1) to “Always” (9). There is also a “Not Applicable” option, for instances where the respondent is not familiar with a particular workplace behaviour. Multiple respondent groups can provide ratings, specifically: self; supervisor; co-worker; subordinate; and other. People tend to behave differently depending on relationship type, as various factors can influence the dynamics of relationships (e.g. authority). Therefore, some competency areas may be more prevalent in some relationships than others. The use of multiple respondents in various relationships with the participating leader provides insight into behaviours across relationships.

The generated report provides ratings from each respondent group. A summary is also provided, in which strengths and developmental areas identified by each respondent group are displayed.

User Qualifications

The *Psychometrics 360* should be used by human resource professionals, psychologists, or other professionals trained in assessment. The results should only be used within the scope of the test administrator's competencies and professional expertise. Test administrators should take steps to ensure the anonymity of rater's feedback, focusing on aggregate data interpretation. Test administrators should also take precautions to ensure the confidentiality of the participating employee's results. The test results should only be shared with the participating employee's knowledge and consent.

Competency Definitions

Competencies measured by the *Psychometrics 360*

Works to High Quality Standards	Empowers Employees	Displays Flexibility
Seeks Innovation	Displays Cooperation and Teamwork	Encourages Open Dialogue
Fosters Teamwork	Shows Organization Awareness	Shows Respect and Sensitivity to Others
Expresses Ideas Clearly in Written Form	Satisfies Customers	Handles Disagreement Constructively
Expresses Ideas Clearly in Spoken Form	Plans Work Activities	Acts to Uphold Safety
Influences Others	Learns Skills and Develops Capabilities	Gathers and Analyzes Information
Mobilizes Activity Around a Clear Purpose	Manages Stress	Solves Problems and Makes Decisions
Coaches and Develops Others	Acts Responsibly and with Integrity	Achieves Results Efficiently

Works to High Quality Standards:

Works neatly and accurately, with attention to detail; completes tasks to a high standard of quality and excellence; expects work group to achieve high quality standards; encourages employees to look for better ways of doing things; looks for ways to improve procedures, methods and outcomes.

Seeks Innovation:

Finds innovative changes to methods or approaches; addresses problems or issues creatively; looks for new and different ways of doing things to improve performance; suggests or starts new and different approaches; comes up with original ideas.

Fosters Teamwork:

Commends work group successes; keeps the work group informed about events in the organization; works to build team spirit in the work group; invites work group members to express their views; involves the work group in “running the business”; takes employee concerns seriously and responds to them; takes action to improve employee satisfaction.

Expresses Ideas Clearly in Written Form:

Uses suitable language in written communication; writes reports and memos clearly and concisely.

Expresses Ideas Clearly in Spoken Form:

Uses language and terminology that is understood by the listener; speaks clearly and understandably.

Influences Others:

When communicating to a group, is sensitive to their position; uses logical arguments, backed by facts and figures; expresses own opinions assertively; able to develop a persuasive presentation; strongly influences opinions, ideas, and plans of co-workers.

Mobilizes Activity Around a Clear Purpose:

Sets clear goals for the unit; leads the work group in discussions of unit performance; communicates goals to employees; aligns daily actions with stated goals; works with employees to set action plans.

Coaches and Develops Others:

Helps employees determine training and development needs; encourages employees to advance their careers; coaches and trains employees to meet performance goals; provides helpful feedback on employee performance.

Empowers Employees:

Delegates responsibility for tasks and decisions to employees; allows employees to make decisions within their job scope; involves employees in decisions that affect the work unit; encourages employees to take on responsibility.

Displays Cooperation and Teamwork:

Works with co-workers to address common interests or concerns; balances self-interest with the interests of co-workers; involves co-workers in matters and decisions that impact them; coordinates work plans with those of other work units/groups; gives co-workers credit for group accomplishments; learns from co-workers and those who report to him/her.

Shows Organization Awareness:

Takes actions that support the goals and activities of the work unit; considers the impact of decisions on other work units and groups; shares important information about the work unit with other groups; supports business decisions made by management; is aware of factors in industry and the community that affect the organization; knows how different groups and departments in the organization function; knows where in the organization to look for answers.

Satisfies Customers:

Knows what is expected of the work unit by internal/external customers; responds to requests for information or services from internal/external customers and suppliers; looks for ways to work more effectively with internal/external customers and suppliers.

Plans Work Activities:

Stays focused on the most important work matters; sets work priorities based on the importance and urgency of tasks; sets realistic timelines for completing tasks; sets a work plan that tracks all aspects of tasks and activities; uses time and resources efficiently to complete tasks on schedule; monitors work progress against expected results.

Learns Skills and Develops Capabilities:

Keen to learn new skills and develop knowledge; seeks out and listens to feedback on personal performance and behaviour; demonstrates the skills required to perform in the work role; changes behaviour in response to feedback from others; learns from mistakes and does not repeat them; shows interest in own career development.

Manages Stress:

Controls emotions when things go wrong; helps others stay calm in stressful situations; keeps a broad view, even when under pressure; finds positive ways to respond to tough situations; responds calmly when faced with many demands at one time.

Acts Responsibly and with Integrity:

Is honest and straightforward in dealings with co-workers; practices what (s)he preaches; accepts responsibility for outcomes of own decisions; is upfront and honest about his/her intentions; earns the trust of co-workers and employees; takes personal responsibility when things go wrong; acts predictably in all situations.

Displays Flexibility:

Adapts own behaviour or approach to match the needs of different situations; responds to co-workers' preferences to do things differently; works effectively with people who do not see things the same way; open to new ideas and approaches suggested by others.

Encourages Open Dialogue:

Easy to talk to; encourages others to share their thoughts and feelings about work matters; seeks out and listens to the ideas and opinions of others; is a good listener.

Shows Respect and Sensitivity to Others:

Understands and accepts personal differences among co-workers; treats all individuals with respect, irrespective of status or background; shows interest in the views and concerns of others; recognizes when feelings and behaviour don't match; knows what is important to employees/co-workers; acts considerately toward employees/co-workers; understands why people do the things they do.

Handles Disagreement Constructively:

Able to disagree without offending people; attempts to resolve disagreements with co-workers; validates and resolves differing viewpoints; seeks common ground in disagreements.

Acts to Uphold Safety:

Expects employees to be responsible for behaving safely; "walks the talk" when it comes to safety; identifies safety risks and takes immediate steps to control them; makes the time to address the safety and wellness of employees; advises others about safety practices and procedures; responds promptly to safety concerns raised by employees; puts safety before production, time pressure or costs.

Gathers and Analyzes Information:

Gathers all information before drawing a conclusion or making a decision; is curious about activities and events and tries to learn more about them; investigates matters thoroughly when faced with incomplete information; seeks and weighs information from different points of view; accurately and objectively assesses information.

Solves Problems and Makes Decisions:

Sets priorities based on an accurate analysis of events and conditions; identifies the most important aspects of complex problems or situations; logically breaks down complex tasks or issues into manageable pieces; identifies problems or issues before they become obvious; sees connections between different situations or events that others might not see; uses past experience to identify problems or situations that need attention; responds to situations and problems in a practical way; identifies and reasons through relevant factors before making decisions or forming conclusions; thinks of possible obstacles and consequences before making a decision; uses new ideas in combination with existing approaches to solve problems.

Achieves Results Efficiently:

Finds ways to do work efficiently and increase output; makes an extra effort to complete work when faced with a challenge; consistently achieves results and meets expected goals; holds others to achieve expected results; sets challenging goals and works to achieve them.

Administrator Instructions

To set up the *Psychometrics 360* questionnaire for a participant, start by logging in to your CareerID portal, and follow these steps.

1. Click on the heading 'Tests', and then on '*Psychometrics 360*', on the far right side.
2. Click on 'Create New 360'.
3. Enter the participant name and email address.
4. At this point, you will have to choose whether to have the 360 raters administered by you, or by the participant him/herself.
 - If you prefer to administer the raters yourself, select the 'raters administered by me' button.
 - If you want the participant to administer their own raters, select the 'raters administered by participant' button, and skip to step 7 in these instructions.
5. You will now enter the raters' information. You will need to select: at least one direct supervisor as well as people the participant interacts with frequently within your organization or even suppliers/customers.

The categories are: Supervisor, Co-worker, Subordinate, and other. With the exception of Supervisor, you will need a minimum of two raters in any one category to generate a valid report.

Please select raters who best fit the following characteristics:

- * Have reasonable direct work exposure to the participant, so that they have had the opportunity to observe their behaviour over time.

- * Someone that you believe will be willing and able to provide meaningful observations of the participant's work behaviour.
 - * Someone who is willing to be frank and honest in noting his or her observations of the participant's work behaviour.
 - * If possible choose raters who have different kinds of exposure to the participant. For example, one or two may work in the same work group, while one or two may be involved in some other way.
6. After setting up the raters, you will send them automatic emails containing the instructions to complete the *Psychometrics 360*.
 7. To manage the *Psychometrics 360* once the instructions have been sent out, login to CareerID and click on '*Psychometrics 360*'. Find the participant's name and click on it. Here, you will have the ability to edit the participant and raters information, as well as add or delete raters. You may also resend the email instructions.

Participant Instructions

You have been selected to complete the *Psychometrics 360* questionnaire.

You will need to complete the questionnaire yourself and you will also need to set up other people with whom you work to respond to the questionnaire. The purpose of this exercise is to provide confidential, accurate feedback to assist with career and performance development. The *Psychometrics 360* questionnaire is completed online, and takes about 45 minutes.

Prior to completing the *Psychometrics 360*, you will need to decide which colleagues of yours will respond to the questionnaire.

You will need to select: at least one direct supervisor, as well as people you interact with frequently within your organization or even suppliers. The categories are: Supervisor, Co-worker, Subordinate, and Other. With the exception of Supervisor, you will need a minimum of two respondents in any one category to generate a valid report.

Please select respondents who best fit the following characteristics:

- * Have reasonable direct work exposure to you, so that they have had the opportunity to observe your behaviour over time.
- * Someone that you believe will be willing and able to provide meaningful observations of your work behaviour.
- * Someone who is willing to be frank and honest in noting his or her observations of your work behaviour. As the responses are confidential, we are hopeful that they will comply.
- * As we are asking for two to four respondents, if possible choose people who have different kinds of exposure to you. For example, one or two may work in the same work group, while one or two may be involved with your work in some other way.

Instructions for completing the 360 questionnaire

Step 1

Prepare your list of respondent names, relationship to you (Supervisor, Co-worker, Subordinate, or Other), and email address. This information will be entered online once you have completed the survey yourself.

Step 2

You will receive an email from your 360 administrator containing your ID and Password, and a link to the questionnaire.

1. Enter the link into the address bar of your web browser. You will be taken directly to the questionnaire.
2. Read the instructions carefully and complete the *Psychometrics 360* questionnaire.

Step 3

Once you have completed and saved the *Psychometrics 360* Questionnaire click "Manage my 360" and enter the names, relationships, and email addresses of your respondents.

Step 4

Email respondents the invitation to complete the questionnaire. You can log back in anytime using the link in this email to check who has completed the questionnaire and to send out reminders to complete the questionnaire.

Best Practices

Prepare raters by:

- Explaining how the feedback will be used (e.g. *development for the leader*).
- Explaining that their feedback will be anonymous and presented as aggregate feedback from multiple people with the same relationship to the ratee (i.e. *peer rater*; *Note: the feedback may not be anonymous if only one rater is available for a respondent group, such as the ratee's supervisor*).

Prepare participants by:

- Explaining how the feedback will be used (e.g. *development, performance appraisal*).
- Preparing them to receive and act on both positive and negative feedback.

Review feedback with the participant. Do not give them the report to interpret without support.

Identify discrepancies between self-ratings and ratings by others.

Identify strengths. These are competencies on which the ratee can rely and learn to use in additional situations.

Identify developmental areas. These are competencies that are relatively weak for the ratee and would benefit from additional development.

Develop goals:

- Consider the importance of specific competencies for the ratee's current role.
- Consider the strengths and developmental areas identified for the ratee.
- Identify specific strengths and developmental areas that will be the focus of the developmental plan.

- Identify more strengths than weaknesses for the developmental plan, as this maintains a positive, motivating balance.

Create developmental plan that includes:

- Goals that are achievement-oriented, not avoidant
 - Goals should focus on achieving something positive (e.g. *write memos that are concise and easy to understand*), not avoiding something negative (e.g. *stop writing confusing memos*).
- Standards for measuring changes and achievement of goals.
- Action steps and learning techniques for each goal.
- Identification of people who can act as supporters and/or provide ongoing feedback.

Keep momentum through ongoing discussions between the ratee and his/her supporter (e.g. *supervisor, coach*) regarding topics including:

- Personal insights
- Motivation
- Skill acquisition
- Performance improvement

Name:

Date:

- 1. List the competencies from page 2 of the feedback that you and your supervisor agree are critically important (*receive ratings of 4 – 5*):

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Give examples of when each critically important competency is used in your job:

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- 2. List the competencies from page 2 of the feedback on which you and your supervisor disagree about critical importance:

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For competencies on which you disagree, how might this potential disconnect regarding expectations and direction of energy cause conflict or issues? Discuss these with the goal of coming to a shared understanding of their importance to your job.

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- 3. List the competencies from page 4 of the feedback that you and your supervisor agree are your strengths:

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Examine the specific behaviours (*beginning page 9*) associated with each competency.
Note the ones that are particular strengths.

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Give examples of when each critically important competency is used in your job:

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Discuss ways in which you can use those strengths more often in your current work role.

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- 4. List the competencies from page 4 of the feedback that you and your supervisor agree would benefit from development.

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Examine the specific behaviours (*beginning page 9*) associated with each competency. Note the ones that are rated as weakest.

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Give examples of when you showed those weaknesses.

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Discuss what changes you would like to see.

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6. List the competencies where there are notable gaps in ratings between you, your peers, and your direct reports (*strengths or weaknesses*):

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Examine the specific behaviours (*beginning page 9*) associated with each competency. Note the ones where there are gaps in ratings between you, your peers, and your direct reports.

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Discuss these competencies and explore examples that might clarify the differences. Which of these can be used more effectively to leverage your contribution? What are the opportunities for you to use them more frequently? Which of these would you like to address for development?

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7. You may have behavioural ratings (*beginning page 9*) that are either relative strengths or weaknesses that you have not addressed above as part of an overall competency. List any of these that you feel are important. Is there a pattern?

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List the behaviours, either strengths or weaknesses, that you would like to address.

Note that you may choose to address ratings by self, supervisor, peers or subordinates.

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Give examples of when you used your strengths.

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Discuss ways that you can use those strengths more often in your current work role.

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Give examples of when you showed your weaknesses.

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Discuss ways that you can use those weaknesses more often in your current work role.

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Being effective in different roles and situations will require that you continually develop new competencies and improve existing competencies. You must decide where to place your energy for development. Most people will find that they can effectively address a small number of development areas. One way to choose those for special attention is to focus on the critically important competencies. You may choose to address competencies or behaviours that you, your supervisor, peers, or direct reports rated as weaker or stronger than the others. Pay particular attention to those with wide ratings gaps.

Use the following tables to establish personal development goals for improving the applications of your strengths and developing some areas of weakness. Develop goals that are specific and establish target dates for meeting goals or completing actions. Ensure the goals and dates are achievable. When establishing these plans, consider the following:

Monitoring and Learning

What will I do each day to consider what worked, what did not work, and what I can do next time?

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How will I periodically evaluate my progress?

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Considering my goals and organizational priorities, how will I update my development strategy and learning plan?

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How will I leverage what I have already learned?

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Feedback and Support

What feedback do I want to receive?

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Who will I ask for feedback?

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How will I prepare feedback givers to provide honest, relevant feedback?

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How will I make it easy for those giving feedback?

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Competency	Action Plan: How will you achieve your goals?	Involvement of others: Who will support you or be affected by your action plan?	Target Date(s)
<p>Competency:</p> <p>Goals:</p>			
<p>Competency:</p> <p>Goals:</p>			

Competency	Action Plan: How will you achieve your goals?	Involvement of others: Who will support you or be affected by your action plan?	Target Date(s)
<p>Competency:</p> <p>.....</p> <p>Goals:</p>			

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Employee's Signature **Date**

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Sponsor's Signature **Date**