# THE GOWER ASSESSMENT AND DEVELOPMENT CENTRE

## Planning and Administration

JULIE HAY

A Gower Book

# THE GOWER ASSESSMENT AND DEVELOPMENT CENTRE

The characters and organizations in this work are entirely fictitious and are intended only to represent typical situations for the purposes of simulation.

# THE GOWER ASSESSMENT AND DEVELOPMENT CENTRE

## Volume 1

## Planning and Administration

Julie Hay

Routledge
Taylor & Francis Group
LONDON AND NEW YORK

First published 1997 by Gower Publishing

Published 2016 by Routledge
2 Park Square, Milton Park, Abingdon, Oxon OX14 4RN
711 Third Avenue, New York, NY 10017, USA

*Routledge is an imprint of the Taylor & Francis Group, an informa business*

Copyright © 1997 Julie Hay

Julie Hay has asserted her right under the Copyright, Designs and Patents Act 1988 to be identified as the author of this work.

All rights reserved. No part of this book may be reprinted or reproduced or utilised in any form or by any electronic, mechanical, or other means, now known or hereafter invented, including photocopying and recording, or in any information storage or retrieval s ystem, without permission in writing from the publishers.

Notice:
Product or corporate names may be trademarks or registered trademarks, and are used only for identification and explanation without intent to infringe.

The materials that appear in this book/assessment may be reproduced for education/training development and selection activities. There is no requirement to obtain special permission for such uses.

This permission statement is limited to reproduction of materials for educational or training events. Systematic or large-scale reproduction or distribution – or inclusion of items in publication for sale – may be carried out only with prior written permission from the publisher.

British Library Cataloguing in Publication Data
Hay, Julie
The Gower assessment and development centre
Vol. 1: Planning and administration
1. Assessment centres (Personnel management procedure)
2. Business planning 3. Management
I. Title
658.3'124

ISBN 9780566077920 (pbk)

Transferred to Digital Printing in 2010

# Contents: Volume 1 – planning and administration

Acknowledgements xi
A short glossary of terms xiii
Welcome to the Gower Assessment and Development Centre 1
The coding system 3
  Codings for types of document 6
  Codings for types of simulation and other activity 7

**PART ONE ASSESSMENT DOCUMENTATION 9**

Assessment documentation: contents 11
Assessment factors: professionals 13
Assessment factors: management 15
Rating scale 17
Participant self-assessment 19
Observer record: individual 21
Observer record: group discussion 23
Assessment sheets without factors 25
  Job analysis 25
  Self-assessment 27
  Assessment sheet 29
  Assessment summary 31
Assessment sheets with professional factors 33
  Job analysis 33
  Self-assessment 35
  Assessment sheet 37
  Assessment summary 39
Assessment sheets with management factors 41
  Job analysis 41
  Self-assessment 43
  Assessment sheet 45
  Assessment summary 47
IN-TRAY marking sheet 49

**PART TWO PROFESSIONAL DEVELOPMENT WORKSHOP 53**

Professional Development Workshop: contents 55
Development Centre outline 56
About the programme 59
Publicity materials 73
Running the Workshop 87

Programmes 105
Assessor/participant allocations 137
Follow-up day 155

**PART THREE MANAGEMENT ASSESSMENT CENTRE 161**

Management Assessment Centre: contents 163
Management Assessment Centre outline 164
About the programme 167
Programmes and allocations 173
Administration and documentation 225
Running the programme 275
Additional activities 317
Final assessment and feedback process 339

# Contents: Volume 2 – assessment activities

Acknowledgements xi
A short glossary of terms xiii
Welcome to the Gower Assessment and Development Centre 1
The coding system 3
Codings for types of document 6
Codings for types of simulation and other activities 7

**CONSULTANCY (meetings where cooperation is required) 9**

Introduction 11
Assessor guidelines: professional factors 13
Assessor guidelines: management factors 15
Himberton 17
Thatchet 23
Start-up 29
Compofreeze 35

**RECOMMENDATION (meetings where participants have conflicting aims) 45**

Introduction 47
Assessor guidelines: professional factors 49
Assessor guidelines: management factors 51
PQRS 53
Incentivo 59
Metrohospital 77
Special Projects 85

**CONTINGENCY (activities where interruptions must be dealt with) 93**

Introduction 95
Assessor guidelines (group): professional factors 97
Assessor guidelines (individual): professional factors 99
Assessor guidelines (group): management factors 101
Assessor guidelines (individual): management factors 103
Small Zoo 105
Medanair 135
World Aid 201

**PRESENTATION (presentations and talks) 239**

Introduction 241
Assessor guidelines: professional factors 243
Assessor guidelines: management factors 245
Hobby 247
Short Talks 253
Training Topics 259
Topics 265
Employers and Government 271

**DISCUSSION (one-to-one interviews of various kinds) 277**

Introduction 279
Assessor guidelines: professional factors 281
Assessor guidelines: management factors 283
Change 285
Customer Calls 293
Enophelet 303
Erifbus* 313
Ashley Jones 317
Garwan Phillips 327

**REPORT (report and proposal writing activities) 337**

Introduction 339
Assessor guidelines: professional factors 341
Assessor guidelines: management factors 343
Group Trip 345
Consultancy* 369
Erifbus 373
Ashley Jones* 409
Incentivo* 413
Conference 419
Garwan Phillips* 573

*linked to previous activities

# Contents: Volume 3

Note to the user ix
Acknowledgements xi
A short glossary of terms xiii
Welcome to the Gower Assessment and Development Centre 1
The coding system 3
  Codings for types of document 6
  Codings for types of simulation and other activities 7

**PART ONE GENERAL DOCUMENTATION 9**

Participant report 13
Interview guide 15
Example of marking guide 19
Marking guide (front page) 33
Marking sheet 35
Assessor guidelines: management factors 39
Assessor guidelines: professional factors 41

**PART TWO IN-TRAY ACTIVITIES 43**

Holly Kitchen 47
Noiparut 71
Mainframe 127
Mictel 183
Ortem 247

# Acknowledgements

Thanks are due to the following for permission to adapt and reproduce their brochures in Volume 2:

- Bristol City Council Leisure Services
- British Tourist Authority
- English Riviera Conference Bureau
- Greater Manchester Visitor and Convention Bureau

Please note that the information reproduced is not current: it is included only for the purpose of simulation.

Thanks are also due to Janis Kent of Sun Alliance for permission to use the results of consultancy work and some very stimulating sessions inventing simulated organizations together.

Although they are unlikely to read this, thanks are also due to the hundreds of participants who have attended assessment and development centres and thus helped to refine the simulations contained in this manual.

# A short glossary of terms

**activity:** used to refer to simulations and also to non-simulated tasks, questionnaires, interviews and so on.

**assessor:** a person who observes and then assesses a participant; an assessor may also be a participant or they may be a senior manager or specialist (for example, a psychologist or a personnel officer).

**competence, competency:** see **factor**.

**criterion:** see **factor**.

**factor:** a quality, characteristic, skill or trait that is to be assessed. We use this term throughout the manual so that it will not clash with any existing lists you have which may be called criteria, competences, competencies and so on.

**participant:** a person who attends an Assessment or Development Centre and is to be assessed.

**role player:** someone who plays a role during an interaction with a participant; this role will be predetermined and described in the documentation for the activity because it is important that role plays are consistent. A role player may be another participant, an assessor, a volunteer who is otherwise not associated with the assessment programme, or a professional actor or actress.

**simulation:** a fictitious situation in which participants are expected to demonstrate their capabilities; designed to eliminate the possibility that existing job knowledge might distort the way the participant behaves (either favourably or unfavourably).

# Welcome to The Gower Assessment and Development Centre

This is Volume 1 of a three-volume manual which contains all you need to run your own assessment or development centres.

**Volume 1** contains important programme information, such as

- a range of assessment documentation for you to reproduce
- sample programmes for an assessment and a development centre
- suggestions for introducing and publicizing your centres
- example 'lecture notes' for briefing participants and assessors
- administrative guidelines to help you run your centres, including flowcharts
- ideas for evaluating the success of your centres.

**Volume 2** contains full documentation for the participants, the assessors and the Programme Manager for running a range of simulations of:

- meetings where cooperation is called for
- meetings where participants have conflicting aims
- activities where interruptions must be dealt with
- presentations and talks
- one-to-one interviews of various kinds
- report and proposal writing exercises.

**Volume 3** contains full documentation for the participants, the assessors and the Programme Manager for running simulations of in-trays of varying levels of complexity.

Each activity contains:

- briefing papers to explain the exercise to participants
- background information for participants to absorb
- items of correspondence, reports, messages and so on for participants to deal with
- guidelines to help assessors evaluate the actions taken and relate these to assessment factors.

## Telephone Help Line

For help and advice on any aspect of this manual or further guidance on running your Assessment or Development Centre, contact:
**Julie Hay on 07000 234683**

Julie Hay
A D International
Sherwood House
7 Oxhey Road
WATFORD
Herts
WD1 4QF

# The coding system

The administration of an Assessment or Development Centre is complex. Administrators, assessors and staff all require their own set of documents for each activity.

We have used a series of reference codes throughout this manual to help you identify the materials that you require for the administration of your Centre.

Those documents that are photocopy masters carry a code indicating the recommended colour of photocopy paper to be used. Using a single colour of paper for a particular type of document will help you ensure that the right people always get the right documents. This is particularly important for restricted documents such as activity briefs and assessor guidelines, which shouldn't be taken away or inadvertently shown to potential participants.

The codings for documents you will be using to run your Centres consist of:

- type of simulation – for example, report writing or presentation
- specific activity names – for example, Erifbus or Mictel
- type of document – for example, participant brief or form for assessor to use
- page and total pages.

So DISC/GARW/PB/1 of 4 would indicate that this is a DISCUSSION type of activity/entitled Garwan Phillips/Participant Brief/and this is page 1 out of 4 pages in all.

Some documents can be used for several activities. In that case, an asterisk will be used to indicate a 'wild card'. For example, INTY/*/PR/1 of 2 indicates the first page of a two-page participant report which can be used with any of the IN-TRAY simulations.

Some documents require you to add details to suit your own requirements. In that case, parts of the coding will have been left blank. For example, INTY/ /OS/ indicates a standard sheet that can be used as an observer guide for IN-TRAY simulations.

Occasionally an activity will have only one version and will therefore have no specific name. For example, JOBR/PB/1 of 1 is a one-page participant brief for a job report.

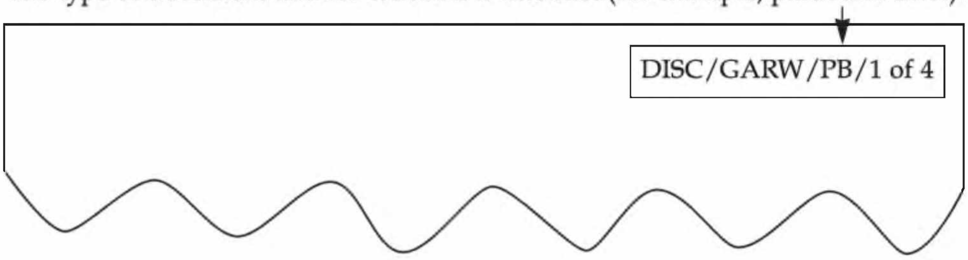
Documents like this one, which tell you how to use this manual, will be simply coded MA at the top of the page.

The following examples illustrate the codes and their meanings for different types of document.

MA

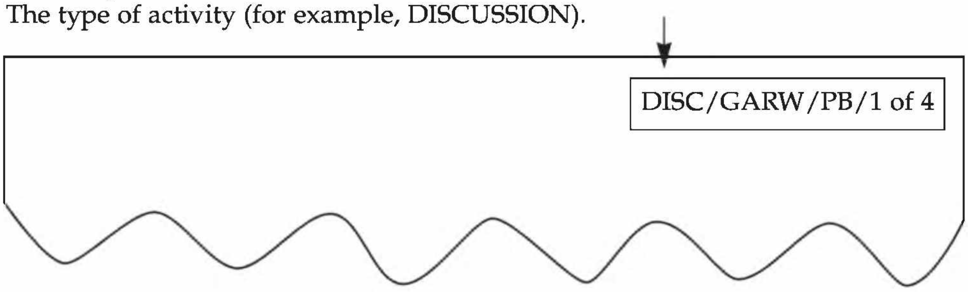
## All documents

The type of document and for whom it is intended(for example, particular brief).

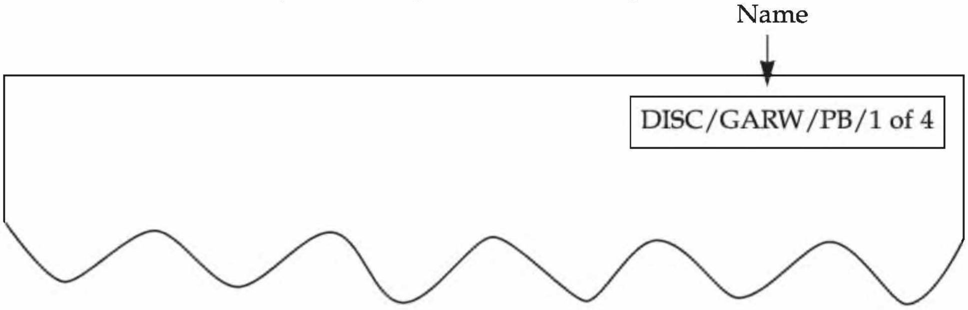

DISC/GARW/PB/1 of 4

## Activity documents

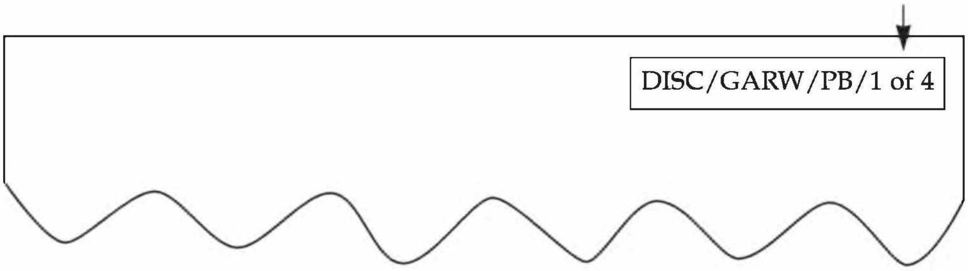
The type of activity (for example, DISCUSSION).


DISC/GARW/PB/1 of 4

The name of the activity (for example, Garwan Phillips).

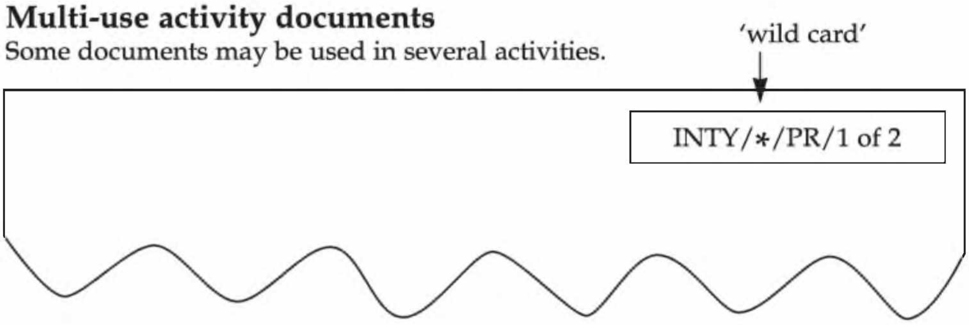

Name
DISC/GARW/PB/1 of 4

The number of pages in the document plus the page number of the current page.

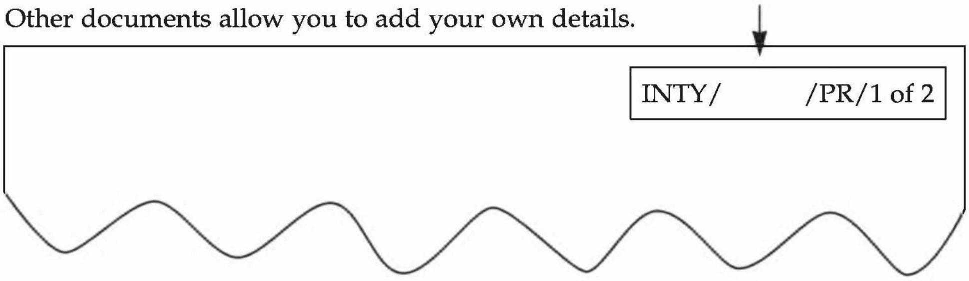

DISC/GARW/PB/1 of 4

## Multi-use activity documents

Some documents may be used in several activities.

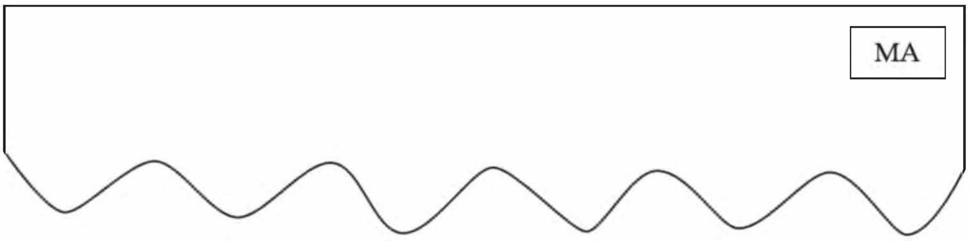


Other documents allow you to add your own details.



## Using the manual

Documents telling you simply how to use this manual, rather than providing instructions for running the Centre, carry a simple code at the top of the page.



The tables on the following two pages give:

- the document codes and an explanation of the type of user, together with the recommended colour of paper for photocopying.
- the codes for the different types of simulations available in this manual.

## Codings for types of document

| Documents | | Code | Suggested colour for copying |
|---|---|---|---|
| **Using this manual:** pages that tell you how to use the contents of this manual | | MA | Not applicable |
| **Programme management:** used only by the person(s) running the Centre – for example 'lecture notes', description of simulations | | PM | Yellow |
| **Programme administration:** used by participants and assessors but not taken away afterwards – for example, programmes, seating plans | | PA | Pink |
| **Participant briefs:** for participants to read and make notes on if they wish – for example, explanations of activities, background information on simulated organizations. Keep in separate folders for each participant for each activity | | PB | White |
| **Participant reports:** for completion during or after the activities and to be retained in folders with the participant briefs – for example, questionnaires about how they feel they performed | | PR | Cream |
| **Observer sheets:** used by assessors to note what participants say and do and to be retained in the folders with participant briefs and reports | | OS | White |
| **Assessment sheets:** used to record assessments of participants and to be collated during the programme so a summary can be written at the end | | AS | Green |
| **Assessor briefs:** additional information to help assessors follow the content of the simulations | | AB | Yellow |
| **Assessor guidelines:** guidance for assessors on what to look for when assessing specific activities – these must not be seen by participants | | AG | Orange |
| **Role-player briefs:** not to be seen by participants unless the Centre is based on peer assessment | | RB | Orange |
| **Role-player report:** used by the role players to record their reactions to the participant | | RR | Cream |
| **General information:** information – such as programme descriptions, lists of factors – issued generally to participants, assessors, managers and potential participants | | GI | Blue |
| **Miscellaneous:** items used outside the Centre, such as programme or assessor evaluations completed by participants, and assessor training handouts | | MI | Cream |

## Codings for types of simulation and other activity

| **Type** | **Format** | **Code** |
|---|---|---|
| **CONSULTANCY** | meetings where cooperation is appropriate | CONS |
| **RECOMMENDATIONS** | meetings where participants have conflicting aims | RECO |
| **CONTINGENCY** | activities where interruptions must be handled | CONT |
| **PRESENTATION** | presentations or talks to a group | PRES |
| **REPORT WRITING** | reports and proposals to be written | REPT |
| **IN-TRAY** | items of correspondence, reports, messages and so on to be dealt with | INTY |
| **DISCUSSIONS** | one-to-one activities, such as interviews, briefings or appraisals | DISC |
| **ADMIN** | time slots used for test administration and suchlike | ADMN |
| **OPTIONS** | time slots used for variety of tasks so that participants have to manage their own time | OPTN |
| **PERSONAL INTERVIEW** | assessor interviews participant (not a simulation) | PINT |

# PART ONE

# Assessment documentation

# Assessment documentation: contents

### Assessment factors: professionals

A set of nine factors that have been identified as appropriate for professional staff and have been successfully applied in a variety of organizations. 13

### Assessment factors: management

A set of nine factors based on extensive research into management effectiveness.* 15

### Rating scale

A simple scale that relates assessments to average performance at the target level being simulated; assessor training should include classification/agreement about what constitutes average performance. 17

### Participant self-assessment

For completion by participants after they have completed an activity; this is an optional form that is required if the assessment criteria include self-awareness. 19

### Observer record: individual

For assessor use when observing one person, as in presentations or one-to-one discussions. The main column is for recording as much evidence as possible and the 'Notes' column is for noting other aspects (such as how a role player behaved). 21

### Observer record: group discussion

For assessor use when observing two participants, as in group activities, meetings, and so on. There is one main column for each participant plus a smaller column in the centre for noting any other aspects (such as the reactions of the rest of group). 23

### Assessment sheets with space to insert your own factors

- **Job analysis:** for participants to consider how the assessment factors are likely to show up in their own jobs, and to rate the relative importance of each, using a simple high, medium, low scale. 25

---

* See Julie Hay (1990), 'Managerial competences or managerial characteristics', *Management Education and Development*, **21**, Part 5, pp. 305–15.

- **Self-assessment:** for participants to note what evidence of each factor that they consider they demonstrate and to rate themselves. This is a useful exercise to get them thinking about the factors, especially at the start of a Development Centre. 27
- **Assessment sheet:** for assessors to complete for each participant after each activity (that is, they analyse the observer sheets to produce short summaries for each factor, and then add a rating). 29
- **Assessment summary:** for summarizing assessments from several simulations (and several assessors) into an overall report; these may be completed by the individual participant at the end of a Development Centre or by the team of assessors at the end of an Assessment Centre. 31

## Assessment sheets with professional factors

As above but already prepared for you to make copies if you decide to use the professional factors included in this volume.

- **Job analysis** 33
- **Self-assessment** 35
- **Assessment sheet** 37
- **Assessment summary** 39

## Assessment sheets with management factors

As above but already prepared for you to make copies if you decide to use the management factors included in this volume.

- **Job analysis** 41
- **Self-assessment** 43
- **Assessment sheet** 45
- **Assessment summary** 47

## IN-TRAY: marking sheet (first and subsequent pages)

For you to insert the appropriate headings to match the items in your in-tray, before you make copies. You will also need to insert the appropriate activity code and page numbers at the top once you know how many pages are required. 49

These are useful to help assessors sort out the large quantity of evidence provided by IN-TRAY simulations. They mark each item in turn and can then scan along a factor to summarize their comments on to an assessment sheet.

**Note: Additional documentation is contained within Part Three: Management Assessment Centre as follows:**

- **Assessor notes:** development action: for the assessor to make notes during the session at which assessments are summarized, for reference subsequently during the feedback interview with the participant. 345
- **Assessment programme report:** summary of strengths, weaknesses and development plans, prepared by assessor group during the final assessment discussion for reference subsequently during the feedback interview. 347
- **Evaluation of assessor:** for completion by the participant after the feedback interview. 349

## Assessment factors: professionals

---

**A. Processing written information**
Absorbs information through reading bulletins, manuals, trade press and so on. Presents information through proposals, reports, letters.

**B. Verbal communication skills**
Communicates to others via telephone and face-to-face, one-to-one and in meetings, and through presentations and demonstrations.

**C. Networking**
Can track down sources of information. Knows who to contact. Keeps the appropriate people informed. Acts as liaison between others.

**D. Looking ahead**
Anticipates difficulties and spots opportunities. Makes plans for self and others. Identifies potential resources. Alerts management to issues to forestall problems.

**E. Coordinating**
Monitors progress, follows up, coordinates work done by self and others. Orchestrates. Initiates action to correct deviations from plan.

**F. People skills**
Gets on with others, individually and in groups. Deals with a wide range of people, at all levels, with different styles, inside and outside the organization.

**G. Time management**
Can work with and without interruptions. Sets priorities, meets deadlines.

**H. Influencing skills**
Can influence and get help and information from others. Handles problems without detriment to working relationships.

**J. Business perspective**
Understands business of the customer and own organization. Identifies customer requirements. Matches these to available products and services. Recognizes resource and cost constraints.

Reproduced from *The Gower Assessment and Development Centre, Volume 1: Planning and Administration*, Julie Hay, Gower, Aldershot.

# Assessment factors: management

---

### A. Response to change

Responds positively to change, whether of people, procedures, tasks, constraints or objectives. Initiates change and seeks change as opportunity.

### B. Sense of responsibility

Expects and accepts responsibility for self, others, the organization and the environment. Is decisive and in the driving seat. Manages proactively for the greater good of the community.

### C. Impact

Behaves confidently, in command of self and situation. Exercises power and influence.

### D. Conceptualizing

Diagnoses, collects and analyses information. Looks for links and develops new constructs. Intellectually manages complexity and ambiguity.

### E. Multiple perspectives

Shows interest in perspectives of others. Can combine and contrast different disciplines. Understands own part in the total. Sees the whole picture.

### F. Prediction

Looks ahead, predicts and forecasts. Prepares, plans, recognizes, and acts in advance of, obstacles. Reads the environment.

### G. Respect and responsiveness

Recognizes the worth of others, respects their contributions and empowers people. Spends time on relationships. Empathizes.

### H. Communicating

Recognizes the need to communicate and does so consistently. Shares the vision. Puts efforts into making contact, formally and informally.

### J. Self-awareness

Monitors own performance and its impact on others. Is open and honest. Uses feedback to learn. Is self-aware and self-analytical.

GI/1 of 1

# Rating scale

## Orientation

| | |
|---|---|
| 0 | no opportunity to observe the factor |
| 1 | very little of the factor shown |
| 2 | not much of the factor shown |
| 3 | moderate amount of the factor shown |
| 4 | quite a lot of the factor shown |
| 5 | a great deal of the factor shown |
| 5h | so much of the factor shown that it could become a problem |

## Skill

| | |
|---|---|
| 1 | standard for target level definitely not met |
| 2 | standard for target level not quite met |
| 3 | standard for target level just met |
| 4 | standard for target level comfortably met |
| 5 | well above standard for target level |

Reproduced from *The Gower Assessment and Development Centre, Volume 1: Planning and Administration*, Julie Hay, Gower, Aldershot.

PR/1 of 1

# Participant self-assessment

**Participant**________________________ **Activity** ______________________________

1. **Please describe your behaviour during the activity.**

2. **What did you do that was particularly effective?**

3. **What, if anything, did you do that turned out to be ineffective?**

4. **If you were to repeat the activity, what might you do differently next time?**

Reproduced from *The Gower Assessment and Development Centre, Volume 1: Planning and Administration*, Julie Hay, Gower, Aldershot.

OS/1 of 1

## Observer record: individual

---

**Assessor** ______________________ **Activity** ______________________

**Participant** ______________________ **Date** ______________________

**Page** ______________________

| Observations | Notes |
|---|---|
| | |

Reproduced from *The Gower Assessment and Development Centre, Volume 1: Planning and Administration*, Julie Hay, Gower, Aldershot.

# Observer record: group discussion

**Assessor** ______________________ **Activity** ______________________

**Participant** ______________________ **Date** ______________________

**Participant** ______________________ **Page** ______________________

| **Participant:** | **Others** | **Participant:** |
|---|---|---|
| | | |

Reproduced from *The Gower Assessment and Development Centre, Volume 1: Planning and Administration*, Julie Hay, Gower, Aldershot.