

# Skills Assessment Toolkit

Step 4 of “Designing and Filling New  
Positions”

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# This toolkit provides detail on Step 4 of the “Designing and Filling New Positions” process

	Step 1: Define strategic requirements	Step 2: Identify gaps in organizational capabilities	Step 3: Design new and modified positions	Step 4: Assess internal candidates	Step 5: Fill new and modified positions
Activities:	<ul style="list-style-type: none"> <li>Clarify your strategic priorities (often outlined in a business plan)</li> </ul>	<ul style="list-style-type: none"> <li>Determine what capabilities are required to achieve your strategic priorities</li> <li>Identify any gaps in current capabilities</li> <li>Decide which positions you need to modify or add to fill those gaps</li> </ul>	<ul style="list-style-type: none"> <li>Revise the definitions of existing positions as necessary</li> <li>Develop position profiles for new positions</li> </ul>	<ul style="list-style-type: none"> <li>Identify and assess the skills of internal candidates for the new and modified positions</li> </ul>	<ul style="list-style-type: none"> <li>Consider the following options:                             <ul style="list-style-type: none"> <li>Hiring the best-suited internal candidate</li> <li>Advertising externally</li> <li>Engaging an external search firm</li> </ul> </li> <li>Determine how you will train existing staff to fill new roles</li> </ul>
Links to Bridgespan resources:	<ul style="list-style-type: none"> <li><a href="#">Business Planning for Nonprofits</a></li> </ul>		<ul style="list-style-type: none"> <li><a href="#">Position Profile Toolkit.pdf</a></li> <li><a href="#">Position Profile Template.doc</a></li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Skills Assessment Toolkit.pdf</a></li> <li><a href="#">Skills Assessment Tool.xls</a></li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Hiring Toolkit</a></li> </ul>

# Some basic principles of assessing the skills of internal candidates

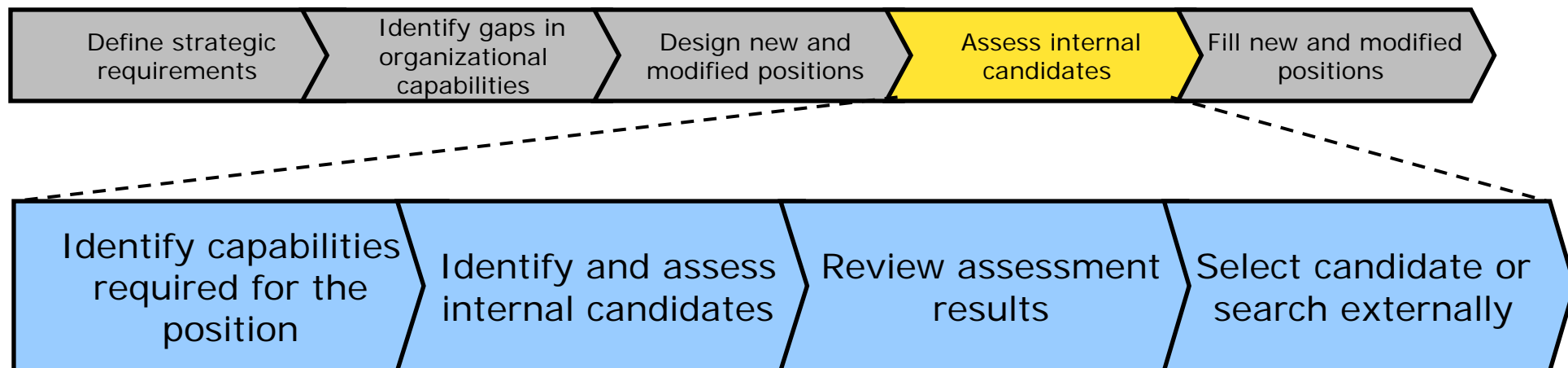
## **Consider using a skills assessment if you are:**

- Creating a new position based on changes in strategic direction and you want to determine if particular employees are well suited for it
- Redefining an existing position to include new or different responsibilities and you need to determine if the current individual in this position has the required skills and capabilities to remain effective
- Determining if you have the internal talent to fill an existing position that has been vacated

## **When conducting a skills assessment, you should:**

- Engage multiple people who are at a higher level than the candidate to conduct the assessment but also gather 360° input from peers or direct reports who may have worked with the candidate in the past
- Collect additional data points, such as performance reviews, to include as part of the overall assessment without relying on a skill assessment as the single source of input
- Maintain confidentiality of the process and results!

# Internal candidates can be consistently assessed for required capabilities using a four-step process



- Review the **position profile\***
- Identify the **technical and management competencies** that the position will require
- Establish a system to **compare internal candidates** across the same set of criteria (consider using a **skills assessment tool**)

- **Identify the internal candidates** you would like to assess for the position
- **Form an assessment team** including hiring manager and other key stakeholders who have experience working with the individual
- **Gather information** regarding the candidate and **complete the assessment tool**

- Hold **group discussion** to review candidates
- In addition to the assessment tool, use **performance reviews and other feedback** to evaluate candidates

- **Determine best candidate**
- **Communicate the decision** throughout the organization
- If a suitable candidate has not been identified, **consider external hiring alternative**

\*See Position Profile Toolkit

Identify capabilities required for the position

Identify and assess internal candidates

Review assessment results

Select candidate or search externally

Start by reviewing the position profile created, which should include a balance of required technical and management capabilities (see [Position Profile Toolkit](#))

<b>Job title</b>	Manager, behavioral health site expansion
<b>Position summary</b>	The Manager of behavioral health site expansion will oversee the roll out of behavioral health programs to PROGRAM sites to support PROGRAM's strategic goal of integrating health care and youth care services into a single continuum at sites.

**Key Capabilities**

- Knowledge of behavioral health programs and, ideally, of PROGRAM offerings
- Contracting (youth care)
- Understanding of PROGRAM & youth care field
- Risk management
- Influencing
- Collaboration
- Communications
- Planning
- Project Management
- Relationship Building

**Key Performance Indicators**

- All sites will be in full compliance with OSHA standards
- Staffing plan will be completed in time and within budget
- Policy and procedures will be fully operational at each site

These **technical capabilities** ("hard skills") are essential for the position's responsibilities

- Knowledge of the organization's field (behavioral health programs)
- Contracting for youth care services
- Familiarity with peer/competitor organizations
- Risk management
- Project management

These **management competencies** ("soft skills") are essential for success and "fit" in the position

- Influencing
- Collaboration
- Communications
- Planning
- Relationship Building

Identify capabilities required for the position

Identify and assess internal candidates

Review assessment results

Select candidate or search externally

## After identifying the position's required capabilities, systematically assess internal candidates for potential fit

- Using a **skills assessment tool** provides a consistent way for the organization to evaluate and compare multiple internal candidates, based on:
  - The candidate's technical and management competencies relative to those required for success in the role
  - Other qualitative information from peers, supervisors, and other colleagues
- A tool should be **customized for each position** with the following information:
  - Required **technical and management capabilities**
    - Rating of each capability's **priority level** (e.g., 3=essential; 1=somewhat important)
    - Rating of each internal **candidate's skill level** in each required capability (e.g., 3=expert; 1=beginner)
    - Rating of **required skill level** in each capability for the position (e.g., 3=expert; 1=beginner)
    - Calculation of **capability gap** (candidate's skill level less required skill level; may be positive or negative)
  - **Open-ended questions** to facilitate qualitative input from others who know the candidate's work
    - What are the three most valuable assets that this person brings to the role?
    - What are the three biggest challenges associated with placing this person in the role?
    - NOTE: you should decide if you will share the tool and results with candidates if requested



**The following page contains a link to a blank, Excel-based skills assessment template with sample technical and management competencies**

Identify capabilities required for the position

Identify and assess internal candidates

Review assessment results

Select candidate or search externally

*Customize the skills assessment template according to your needs*

*Click here to access the tool (Excel): [Skills Assessment Tool](#)*

<b>Job title</b>	
<b>Candidate</b>	
<b>Evaluator</b>	

### Assessment of Technical Capabilities

Capability	Priority	Current Level	Required Level	Capability Gap	Qualitative Observations/Other
Technical Capability #1	<i>Rate on scale of 1 (low)- 3 (high)</i>	<i>Rate on scale of 1 (low)- 3 (high)</i>	<i>Rate on scale of 1 (low)- 3 (high)</i>	<i>Required level less current level</i>	
Technical Capability #2					
...					

### Assessment of Management Capabilities

Capability	Priority	Current Level	Required Level	Capability Gap	Qualitative Observations/Other
Management Capability #1	<i>Rate on scale of 1 (low)- 3 (high)</i>	<i>Rate on scale of 1 (low)- 3 (high)</i>	<i>Rate on scale of 1 (low)- 3 (high)</i>	<i>Required level less current level</i>	
Management Capability #2					
...					

### Open-Ended Questions

- What relevant experience does this candidate possess?
- What are the three most valuable assets that this person brings to the role?
- What are the three biggest challenges associated with placing this person in the role?

Identify capabilities required for the position

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Select candidate or search externally

## A completed skills assessment template includes all the required job elements

<b>Job title</b>	Manager, Behavioral Health Site Expansion
<b>Candidate</b>	Bob Lopez, Manager, Northeast Behavioral Health Center
<b>Evaluator</b>	Jackie Smith, COO

### Assessment of Technical Capabilities

Capability	Priority	Current Level	Required Level	Capability Gap	Qualitative Observations/Other
Youth Care Contracting	3	2	2	0	• Has used this knowledge to obtain favorable reimbursement levels for Northeast.
Complex project planning	3	1	2	-1	• Was a strong participant in executing our recent facility move, but did not plan the project from the outset.
Behavioral health program knowledge	3	3	2	+1	• 16 years of field experience make Bob a powerful asset to the team.

### Assessment of Management Capabilities

Capability	Priority	Current Level	Required Level	Capability Gap	Qualitative Observations/Other
Influencing	2	3	2	+1	• Current supervisor praises consensus-building ability.
Collaboration	3	2	2	0	• Has engaged in many successful team projects.
Relationship building	3	2	3	-1	• Some concerns from former supervisors regarding readiness to work with senior leadership team.

### Notes on Open-Ended Questions

- Very seasoned candidate, with relevant experience in multiple facilities and expertise in other systems
- Potential challenges are: readiness to work directly with executive team; Bob's potential preference for direct-service rather than administrative work; other strong internal candidates



Identify capabilities required for the position

Identify and assess internal candidates

Review assessment results

Select candidate or search externally

## Reviewing the assessment results provides an opportunity to integrate feedback from multiple sources

- Internal candidates' assessment results should be reviewed in a group setting in order to:
  - Allow members of the assessment team to calibrate perceptions and expectations
  - Draw on additional fact-based documentation that may provide a more holistic view of candidates
  - Ensure clarity on how the final decision will be made (consensus-driven, majority-driven, or one individual with final decision rights)
- Assessment discussions should be facilitated by one person; preferably HR
- A rule of thumb is that if an internal candidate hits 70% of requirements, they are likely to be a good match for the role

Identify capabilities required for the position

Identify and assess internal candidates

Review assessment results

Select candidate or search externally

## The final step of the process is to select an internal candidate or proceed to external hiring

- Once the decision on the internal candidate has been made, care should be taken in communicating the outcome to the candidate and the organization
- Sensitivities include:
  - If the candidate got the job, will you be providing training/development? If so, what will comprise the training?
  - If the candidate did not get the job, will he/she be continuing with the organization?
- If a suitable internal candidate has not been identified, consider seeking external candidates for the position. You may choose to engage an external search firm to help with the process
- More information on these options is available in the Bridgespan [“Hiring Toolkit”](#)