Navigating the Competency Modeling Maze

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Overview

- Job Analysis (JA) vs. Competency Modeling (CM)
  - Importance
  - Definitions
  - Comparisons
  - Best Practices

- Practical Implications
  - Original Project Task and Goals
  - Our Approach
  - Obstacles
  - Outcomes and Deliverables
  - Lessons Learned
  - The Exit Strategy

What adjectives would you use to describe…

Job Analysis (JA)?

- Traditional

- Systematic

- Rigorous

- Time consuming

- Narrowly focused
  - Tasks or work activities
  - Specific knowledge, skills, and abilities (KSAs)

- Job specific

- An approach to competency modeling

Competency Modeling (CM)?

- Broad

- User-friendly

- Tied to organizational goals and strategy

- Widely applicable, crosscutting

- An approach to job analysis

Importance of Job Analysis and Competency Modeling

- Both serve as a foundation for a variety of human resources (HR) functions
  - Selection & Promotion
  - Performance Appraisal
  - Training and Development

- Job analysis is a legally defensible process supporting HR decision making

- Competency modeling can align an organization's HR systems

Definitions

Job Analysis (JA)

= a systematic procedure for gathering, documenting, and analyzing information about the content, context, and requirements of a job

Outcomes

- List of specific tasks/activities/work behaviors for the job

- List of knowledge, skills, abilities, and other characteristics (KSAOs) or competencies important for successful performance on the job

Competency Modeling (CM)

= a systematic procedure for identifying a set of competencies important to effective organizational performance

Outcomes

- collections of KSAOs or competencies needed for effective performance in the job(s) or organization-wide
(Campion et al., 2011)

In Discussion

- Are job analysis and competency modeling the same?

- Are job analysis and competency modeling different? How are they different?

- Which approach is best?

Job Analysis vs. Competency Modeling: Perspectives in the Literature

- JA uses a more rigorous methodology than CM

- JA uses a bottom-up approach, rather than top-down approach as used in CM

- CM considers the future, rather than just the present

- JA is work-oriented; CM is worker-oriented

- CM can set performance expectations and influence employee behavior

- CM links results to organizational goals and strategy, capturing attention of management and executives

(Campion et al., 2011; Sanchez & Levine, 2009; Shippmann et al., 2000)

Job Analysis vs. Competency Modeling: Perspectives in the Literature

- JA is outdated; it cannot accommodate the dynamic nature of today's jobs and organizations

- JA is most appropriate when results are subject to legal or union review (i.e., personnel decision making)

- CM is most appropriate for training and development and aligning HR systems

- CM is the "Trojan Horse" for JA

(Campion et al., 2011; Sackett, Walmsley, & Laczo, in press; Shippmann et al., 2000)

Job Analysis vs. Competency Modeling

Much discussion over the difference between job analysis and competency modeling

- 17 dimensions of differentiation
  - Shippmann et al. (2000)

- 6 dimensions of differentiation
  - Sanchez & Levine (2009)

- 10 dimensions of differentiation
  - Campion et al. (2011)

- 5 dimensions of differentiation
  - Sackett, Walmsley, & Laczo (in press)

- Commonality
  - Methodological rigor
  - Purpose and focus
  - Content and domain coverage

More Recent Perspectives

- "Job analysis and competency modeling should supplement rather than displace one another… they ought to coexist in the human resources toolbox" (Sanchez & Levine, 2009)

- "…inappropriate to proclaim competency modeling as a replacement for job analysis… each approach has a different focus… the appropriateness of either methodology should depend on the purpose" (Sackett, Walmsley, & Laczo, in press)

More Recent Perspectives

- "Job analysis methods must align with purpose: One size does not fit all" (Sackett, Walmsley, & Laczo, in press)
  - Activity vs. Attribute
  - General vs. Specific
  - Qualitative vs. Quantitative
  - Taxonomy-based vs. Blank slate
  - Observer-based vs. Informant-based
  - KSA vs. KSAO
  - Single job vs. Job comparison
  - Descriptive vs. Prescriptive

Best Practices

Campion et al. (2011) outlines 20 best practices, within three main topic areas:

1. Analyzing competency information
    - Consider organizational context
    - Use job analysis methods to identify competencies

2. Organizing and presenting competency information
    - Define the anatomy of a competency
    - Include both fundamental and technical competencies

3. Using competency information
    - Use competencies to develop HR systems
    - Maintain currency of competency model (review/update at least every five years)

In Practice…

- **"TYPE I" CM: Ordinary Job Analysis**
  - Competencies are simply relabeled KSAOs ("Trojan Horse")

- **"TYPE II" CM: Bad Job Analysis**
  - Competencies are ad hoc, "armchair" constructs developed by convenience samples of non-SMEs ("Job Analysis in PowerPoint")

- **"TYPE III" CM: Organizational Development (i.e., NOT job analysis at all)**
  - Competencies are "performance standards for strategic organizational citizenship" and CM is "an organizational intervention designed to promote organizational change or engagement by building, socializing, and internally marketing a common set of behavioral themes and performance standards that reflect an organization's strategies, culture, or values"

(Pearlman & Sanchez, 2010)

PRACTICAL IMPLICATIONS

Original Project Tasks & Goals

- Enterprise-wide competency modeling effort for a large federal agency with many sub-agencies
  - Six mission critical occupations (MCOs)
  - Intended purpose – unite and align common positions from across sub-agencies

- Proficiency level illustrations
  - Six MCOs
  - Intended purpose – assess skill gaps and identify training and development needs

- Career maps
  - Two MCOs
  - Intended purpose – share career development options and progression

Our Approach

- Conduct a job analysis that culminates in a competency model
  - Review core documents (position descriptions (PDs), assessment questionnaires (AQs), vacancy announcements) and HR Manager (task/competency database), O*NET, Bureau of Labor Statistics (BLS)
  - Conduct SME panels (incumbents, supervisors)
  - Administer Occupational Analysis Survey
  - Apply ratings cut-off based on best practices (Uniform Guidelines)

- Develop proficiency level illustrations for eight to ten core competencies for each occupation

Moving Targets

- Conduct a job analysis for ten occupations
  - Review core documents (PDs, AQs, vacancy announcements) and HR Manager (task/competency database), O*NET, BLS
  - Reduce SME panels
  - Remove Occupational Analysis Survey
  - Adjust ratings cut-off for small samples

- Develop proficiency level illustrations for eight to ten core competencies for only three occupations
  - Reduce or remove SME panels

Obstacles

- Limited information provided
  - Relied upon competency databases – HR Manager, O*NET, BLS; and previous project work with similar occupations
  - Unaware of complexities within some positions (e.g., specialty areas, overlapping levels of employee performance)

Obstacles

- Limited timeframe
  - Shortened timeframe for open survey
  - Recommendation to have underrepresented agencies review results
  - In lieu of Occupational Analysis Survey:
    - Snowball sample of SMEs
    - Excel rating worksheets
    - Recommendation for a larger, representative sample to review results

Obstacles

- Limited access to SMEs (communication hierarchy) did not allow us to gain information, gain buy-in, or communicate goals
  - Reused the same group of SMEs
  - Improvised
  - Enticement and incentives

Obstacles

- Lack of SME participation in panels, response to email requests
    - Transparency throughout the process and next steps
    - Communicating value-added and benefits

Obstacles

- Limited allowance of in-person panels
  - One 2-day panel of incumbents and supervisors vs. two 2-day panels
  - Virtual meetings
  - Email reviews

Outcomes/Deliverables

- Job analysis reports for ten MCOs

- Proficiency level illustrations for three MCOs

- Career maps for three MCOs

- Communication plans for career maps

Lessons Learned

- Communication plan upfront is required

- Engage with the union immediately

- Locate all standard operating procedures/policies/regulations impacting the project

- Have a full-time point of contact

- Get a champion

- Have a purpose

- Empower SMEs

- Understand the nature of a position across the organization

The Exit Strategy

- Build Support
  - Considering organizational context
  - Linking competency models to organizational goals and objectives
  - Using organizational language
  - Using diagrams, pictures, and heuristics to communicate competency models to employees
  - Using competencies to align the HR systems

- Build Efficiencies
  - Using competency libraries
  - Achieving the proper level of granularity (number of competencies and amount of detail)
  - Using additional, unique methods

- Build A Useful Process
  - Using rigorous job analysis methods to develop competencies
  - Considering future-oriented job requirements
  - Including both fundamental (cross-job) and technical (job-specific) competencies

(Campion et al., 2011)

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Questions? Comments?

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