



Commission de la fonction publique
du Canada

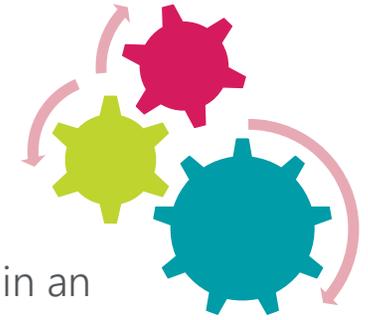
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Flexibility in Assessment



Overview



Hiring managers have a wide range of options and tools to assess candidates in an appointment process.

This presentation highlights ways hiring managers can take advantage of possibilities at the assessment phase of the appointment process and provides guidance on how and when flexibility may be used appropriately.

Some of the areas where the appointment framework provides broad flexibility include:

Establishing
qualifications

Choosing
assessment
methods

Applying
assessment
methods

Establishing qualifications

Managers have a great deal of latitude in identifying qualifications that reflect the needs of the position, whether now or in the future. Qualifications must also meet or exceed the [qualification standards](#) established by the Treasury Board of Canada Secretariat.

Some examples of the flexibility include:

- Establishing which qualifications are essential for an appointment and which could be considered an asset
- Establishing an appropriate number of qualifications
- Defining what the qualification means and identifying the assessment criteria
- Determining whether a qualification is assessed as experience, knowledge or ability (e.g. project management)

Establishing qualifications – Considerations

- The qualifications established must be assessable
- Using too many qualifications that are not clearly distinct from each other may lengthen the assessment process without improving its quality
- The hiring manager may choose the qualifications that make sense given the job requirements and organizational context; there is no requirement to establish any set number of experience, knowledge, ability or personal suitability criteria
- Express the qualifications in a way that does not create barriers (written in plain and neutral language that can be understood by candidates from diverse backgrounds)

Establishing qualifications – Scenarios

Adapting to a changed context:

A hiring manager is about to launch a process for a position that was last advertised 7 years ago. The merit criteria included 16 essential and 10 asset qualifications. The manager now has a very experienced team, having had no turnover until a recent departure.

- The hiring manager decides to remove most of the technical experience requirements and replaces them with competencies
- The hiring manager settles on a total of 5 essential and 3 asset criteria that will allow them to determine whether candidates can successfully perform the job now and in the future

Establishing qualifications – Scenarios (cont'd)

Assessing certain components of a criterion:

A hiring manager is set to launch a staffing process to staff a position in data analytics that will focus on outreach and marketing.

- The manager includes the **ability to tell a story with data** as one of the essential qualifications on the job advertisement
- The manager identifies components of the qualification to be assessed, including: identifying client needs, using statistics to show patterns and draw conclusions, preparing dynamic visualizations and engaging the audience

Choosing assessment methods

Hiring managers have been delegated broad discretion under the *Public Service Employment Act* (PSEA) to determine which assessment tools to use and how each candidate meets a qualification.

Some examples of the flexibility include:

- using non-traditional assessment methods (e.g. group interviews, work samples, pre-recorded video interviews, personal knowledge)
- assessing a qualification or validating an assessment using more than one tool (e.g. interview and references, interview and work samples)
- assessing candidates differently from one another (e.g. accommodation needs, performance reviews, previous assessment)
- using different ways of rating (e.g. pass/fail, assigning a score or a rating)

Choosing assessment methods – Considerations

- The assessment is focused on the qualifications for the position and must provide candidates with an equal opportunity to demonstrate their qualifications
- The same standard for a qualification (e.g. same definition or indicators) must be applied to each candidate
- The validity and reliability of the assessment increases when a variety of complementary sources and assessment tools are used

Choosing assessment methods – Scenarios

Using varied assessment tools:

A hiring manager has launched a process to prepare for anticipated vacancies. After the screening has been completed, 12 candidates remain: 5 candidates from within the department, 4 candidates from other departments and 3 external candidates.

- The hiring manager decides to use information from performance reviews to assess some of the qualifications for the 9 candidates who currently work within the federal public service
- As the 3 remaining candidates are external and do not have performance reviews, the hiring manager decides to use a reference check to assess those same qualifications

Choosing assessment methods – Scenarios (cont'd)

Using personal knowledge:

A hiring manager has launched a process to prepare for anticipated vacancies. After assessing the education and experience qualifications (the screening), 8 candidates remain, 4 of whom are current members of the team. Knowledge and personal suitability are assessed as follows:

- The hiring manager decides to use personal knowledge to assess current members of the team and seeks references for where gaps in information exist
- For the candidates from other departments, the hiring manager administers interviews and seeks references from clients

Choosing assessment methods – Scenarios (cont'd)

Completing assessment information:

A hiring manager with a staffing need has been informed of a pool of qualified candidates in another sector. The position they wish to staff appears to be similar to the one for which the pool was established. However, they realize there are a few additional qualifications for their position which were not included in the original job advertisement.

- The hiring manager uses the information from the other staffing process along with their own assessment of the additional qualifications to determine whether a candidate meets all of their required qualifications

Applying assessment methods

Hiring managers have the discretion to choose whether to follow the traditional model (screening, exam, interview then references); they have additional flexibility when managing the staffing process.

Some examples of this flexibility include:

- Identifying the merit criteria most important for the job and assessing them first
- Using a top-down approach or cut-off score to focus on a smaller set of applicants; candidates not selected at this point may be assessed at a later date for other opportunities
- Administering the assessment tools in an unconventional order (e.g. administering interviews before a take-home exam)

Applying assessment methods – Considerations

- Volume management may be considered in making decisions about assessment (e.g. focusing on veterans, focusing on a specific qualification, giving more weight to a particular qualification)
- The process should consider the amount of time the candidates will have to devote to the assessment including the initial application and any subsequent assessment
- A project management approach can be adopted in order to allow for clear information about the various steps and estimated timelines to be shared proactively with candidates subject to further assessment

Applying assessment methods – Scenarios

Considering a subset of candidates:

A hiring manager with an immediate need has launched a process but is concerned that assessing a large number of candidates will significantly lengthen their time to staff.

- They use an online test and a top-down approach to focus on a smaller set of 10 candidates at the outset
- They set aside candidates who passed the online test but were not in the top 10, but may consider them for future opportunities at a later date
- They complete the assessment of the top 10 candidates and appoint a qualified candidate to staff their immediate need

Applying assessment methods – Scenarios (cont'd)

Administering the assessment tools in an unconventional order:

A hiring manager has launched a staffing process, but due to time constraints they wish to run a more efficient process while still identifying the strongest candidates.

- They decide to administer a short 15-minute interview to assess the most important competency
- They use a top-down approach to identify a set of 10 candidates for further assessment
- The remaining qualifications are assessed through a second more elaborate interview as well as a reference check

Other key takeaways

- Customize staffing strategies based on present and future needs, rather than focusing on what was used in the past
- Build diversity, accessibility and inclusion into appointment decisions (e.g. by applying the [Federal Public Service Inclusive Appointment Lens](#))
- Decisions must be made objectively and hiring managers must be able to explain their decisions
 - Where possible, decisions should be communicated proactively

For more information

- The Public Service Commission's [Personnel Psychology Centre](#) has developed a number of useful [guides and tools](#) related to assessment.
- Hiring managers are also invited to contact their human resources advisor for help in developing effective assessment strategies.
- Additional resources
 - [Effective Merit Criteria](#)
 - [Federal Public Service Inclusive Appointment Lens](#)
 - [Employment Equity – Leveraging Staffing Options for Hiring Managers](#)
 - [Performance Reviews in the Appointment Process](#)
 - [Treasury Board qualification standards](#)

