Executive & Professional Competency Models for Leadership Assessment and Development

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Dan Bean, MA, MBA
Colarelli, Meyer & Associates, Inc.
7751 Carondelet Avenue, Suite #302, Saint Louis, MO 63105
www.cmaconsult.com  email - cmaconsult@cmaconsult.com
Competency Models for leadership assessment and development.

*Executive Competency Model*

*Professional Competency Model*

Create competency models with significant member participation to gain commitment and ownership.
International Economic Development Competency Model Process

Project Planning
(12/10/10)
• Jeff Finkle
• Denny Coleman
• Dan Bean

San Diego
(1/23/11)
• Data collection with executives

Task Force Review & Planning
Draft #1
May

Indianapolis
(6/6/11)
• Data collection with professionals

Task Force Review & Planning
Draft #2 and Rollout to EDRP
July

EDRP Retreat
(7/21/11- 7/23/11)
• Roll out professional and executive competency models for review
• Launch pilot options

Pilot Test
• Selected EDO’s pilot test various uses of the competency model
August - December

4 Pilot Organizations

San Antonio
(1/30/12)
• Roll out competency models for leadership assessment and development

Individual Interviews
N = 15

6 Focus Groups
N = 37

4 Pilot Organizations

Task Force Review & Planning
Draft #3 and San Antonio Rollout
December

N = 37

6 Focus Groups
N = 37

4 Pilot Organizations

N = 15

Individual Interviews
Task Force

▲Allison Thompson
▲Dan Bean (Facilitator)
▲Dana Borchert (Facilitator)
▲Denny Colman
▲Donald Jakeway
▲Fred Morley (Taskforce Chair)
▲Greg H. Wingfield
▲Jeff Finkle

▲Joy Pooler
▲Joy Wilkins
▲Kristen Fish
▲Lynn Haskin
▲Jeremy Sowders
▲Rick Weddle
▲Robert Van Geons
▲Swati Ghosh
A competency model defines the critical capabilities needed to be effective in one’s role given the organization’s future direction.

Competencies are broadly defined.

Ideally, competency models contain fewer rather than more competencies. More than 7-9 competencies makes the model more difficult to use.

Many talent and performance management systems revolve around or build on a competency model.
How Competency Models Support Talent Management

1. Where is your company going and how will it get there?

Vision and Strategy

2. What core skills and capabilities must your organization have to achieve its future direction?

Recruit

3. To what extent do your competencies drive talent management from recruitment to retention?

Select

4. What is the benchmark in your organization?

Manage Performance

5. Who are the successors to your current leaders?

Develop/Promote

6. What is your capability to adapt your talent management system in order to grow your benchmark?

Periodic Talent Review and Succession Planning

Talent Management © 2009
Executive Competency Model Overview

**Analysis and Decision-Making Skills** - Makes effective decisions and solves problems in complex or ambiguous situations by gathering, diagnosing, and judiciously analyzing the information about the situation and environment in order to identify and evaluate options and select the best course of action.

**Economic Development Expertise** - Understands the principles and general trends within the economic development industry. Demonstrates experience in economic development programs. Speaks the industry language to stakeholders.

**Governance Skills** – Establishes excellent board relationships, keeps the board informed, plans effective board meetings and executes board directives.


**Leadership and Influence** - Inspires and influences by communicating a compelling vision of the future, conveying an executive presence, and being sufficiently agile and self-assured to lead others effectively.

**Management Skills** - Manages the work of others by providing direction, structure, and clear expectations; maintains an open flow of communication and a sense of urgency to drive results; holds others accountable; develops others by providing timely and relevant feedback and opportunities for development.

**Relationships and Teaming** - Effectively builds relationships with individuals and teams across the organization by being inclusive, considerate, and responsive to the needs of others; by communicating effectively, collaborating with others, and sharing resources; and by being receptive to feedback.

**Responsibility and Achievement (Self Management, Ethical Integrity)** - Demonstrates integrity and ethical behavior, initiative, commitment to excellence, and effective self-management skills, including responsibility, dependability, organizational skills, detail-orientation, and follow through.
Professional Competency Model Overview

▲ **Analysis and Decision-Making Skills** - Makes effective decisions and solving problems in complex or ambiguous situations by gathering, diagnosing and judiciously analyzing the information about the situation and environment in order to identify and evaluate options and select the best course of action.

▲ **Communication Skills** - Effectively communicates through verbal and written media to stakeholders.

▲ **Industry Understanding** - Aware of and interested in the economic development industry. Deeply learns service area(s). Develops professional capabilities.

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How to Use

△ EDO

△ **Individual Talent Acquisition**
  ▲ Use competencies as criteria for selecting and/or promoting talent.
  ▲ Align selection interview guides with the competency model.
  ▲ Present the competency model to job candidates for self-assessment.
  ▲ Sort the competencies into “ticket to entry” verses “developmental” competencies.

△ **Individual Talent Development**
  ▲ Self-assessment.
  ▲ Performance appraisal.
  ▲ Developmental planning.

△ **Organizational Talent Review**
  ▲ Organization wide view of talent by competency.
  ▲ View of talent at different organizational levels.
  ▲ Bench strength for succession planning.
  ▲ Strategic workforce planning and development.
How to Use - Advanced

Advanced use indicates that a deliverable needs to be developed based on the competency model.

Talent Acquisition
- Develop a behavioral interview guide around the competencies.
- Use a third party to conduct an independent assessment.

Talent Development
- Compare the individual certification process and competency models to ensure necessary areas are included.
- Connect training programs to the competencies. Provide or endorse third party developmental programs for competencies not covered, if any.
- Develop a 360° feedback questionnaire and report.
- Consider use of competency models in accreditation program for EDOs.
Pilot Uses:

△ Individual Talent Acquisition
- Use competencies as criteria for selecting and/or promoting talent.
- Present the competency model to job candidates for self-assessment.
- Sort the competencies into “ticket to entry” verses “developmental” competencies.

△ Individual Talent Development
- Self-assessment.
- Developmental planning.

△ Organizational Development
- Integration of staff following a merger.


**Fond du Lac County**  
Kristen Fish

▲ Individual Talent Acquisition  
△ Criteria for selecting a new president

▲ Individual Talent Development  
△ Self-assessment  
△ Developmental planning

▲ How did the Competency Model Help  
△ Provided perspective  
△ Acted as a framework for interviews  
△ Operated as a guide for development

▲ Challenges  
△ Expanding the use to fit our needs

▲ Lessons Learned  
△ Finding a balance of competencies in a candidate
▲ Individual Talent Acquisition
   △ Criteria for selecting talent
   △ Third party assessment

▲ Individual Talent Development
   △ Self-assessment and developmental planning

▲ How did the Competency Model Help
   △ Drove our thinking
   △ Focused the review committee
   △ Acted as an objective qualification

▲ Challenges
   △ Adapting for departmental-specific competencies

▲ Lessons Learned
   △ Balancing between objective and subjective evaluation
   △ Having a framework was extremely helpful
△ Individual Talent Acquisition
  △ Creation of an External Relations Director position description

△ Individual Talent Development
  △ Self-assessment
  △ Annual review

△ How did the Competency Model Help
  △ Acted as a framework for performance assessment
  △ Used as a guide for developing new job descriptions
  △ Provided structure for candidate interviews

△ Future Plans
  △ Incorporate into future hiring processes and annual reviews
York County Economic Alliance
Darrell Auterson

▲ Individual Talent Development
  △ Self-assessment

▲ Benefits
  △ Honest assessment
  △ Part of team
  △ Everyone participated

▲ Challenges
  △ Surprises

▲ Lessons Learned
  △ Areas of expertise
  △ Training opportunities/Needs
  △ Cross-functional exchange
  △ Diversity of skills
APPENDIX

Executive & Professional Competency Models for Leadership Assessment and Development
Executive Competency Model Overview

▲ Analysis and Decision-Making Skills - Makes effective decisions and solves problems in complex or ambiguous situations by gathering, diagnosing, and judiciously analyzing the information about the situation and environment in order to identify and evaluate options and select the best course of action.

▲ Economic Development Expertise - Understands the principles and general trends within the economic development industry. Demonstrates experience in economic development programs. Speaks the industry language to stakeholders.

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▲ Responsibility and Achievement (Self Management, Ethical Integrity) - Demonstrates integrity and ethical behavior, initiative, commitment to excellence, and effective self-management skills, including responsibility, dependability, organizational skills, detail-orientation, and follow through.
Executive Competency Model

▲ Analysis and Decision-Making Skills

△ Understands large and complex economic development projects that may extend over many years. Has executive, strategic, and long-term critical thinking capacity.
△ Can absorb, analyze and retain large amounts of economic, business, demographic and people relationship data.
△ Has strong mental agility; can readily shift from tracking one person to another person, shift across tasks, projects, etc.
△ Recognizes themes, patterns and trends in disparate data.
△ Is flexible and open to ideas, opinions, and perspectives.
△ Probes and digs for follow-up and additional information.
△ Is able to effectively make judgments based on intuition, experience and data.
△ Can make decisions and judgments effectively in ambiguous situations.
△ Understands and actively manages points of risk in the economic development process.
△ Integrates own and others’ ideas into a cohesive perspective and plan of action.
△ Develops logical approaches and sequences of steps to move an opportunity or project forward in the economic development process.
△ Anticipates the impact of behaviors, actions and decisions on multiple stakeholder groups.
△ Understands and utilizes financial acumen.
Executive Competency Model

Economic Development Expertise

△ Has demonstrated successful experience in economic development, economic development programs, marketing, business formation, tourism, property and land development, or related field involving significant financial deals.

△ Understands the concepts, principles and language of economic development, financing, property development, wealth creation, real estate, etc.

△ With due regard to political considerations, negotiates deals with stakeholder groups (e.g., elected officials, boards, developers, etc.), keeps the deal making process moving and the parties in dialogue rather than allowing the parties to disengage.

△ Recognizes when a deal will not develop and effectively halts the economic development process (may not apply to public sector).

△ Takes appropriate risks and uses innovative approaches to economic development.

△ Translates the directives of the Board into appropriate economic development efforts and activities.

△ Has an education in business, finance, economics, accounting, public administration, urban planning, public policy or related area, or relevant experience.
Executive Competency Model

Governance Skills

△ Builds open channel of information and effective relationships with the board and individual board members.
△ Keeps the board informed, does not allow the board to be surprised.
△ Responds to and follows through on requests and directives of the board.
△ Anticipates questions and needs of the board.
△ Listens to opinions of the board members and helps develop consensus and forward movement.
△ Makes self accountable to the board; readily admits own mistakes and shortcomings, and offers ways to address.
△ Respectfully challenges the board if the board moves from governance to management matters.
△ Uses consultative selling strategies to raise funds for private economic development organizations.
△ Provides respectful and thoughtful feedback to the board to improve its performance.
△ Looks ahead and plans the succession of leadership.
△ Understands and upholds the fiscal and legal responsibilities of economic development.
Executive Competency Model

Industry Vision

△ Develops deep insight into the strengths and weaknesses of the geographic area served and its economic development needs. Maintains facts, figures, trend data, etc. to articulate this insight.

△ Sees opportunities to develop the economic base of the geographic area served, connects resources and needs, promotes strengths, sees strategic synergies, sees ways to address weaknesses, etc.

△ Stays abreast of trends, models, financing vehicles, etc. as they emerge in the industry.

△ Adopts a long-term perspective, especially when considering economic development trends and new services to provide.

△ Develops and communicates a vision and strategic plan for own organization. Keeps vision and plan current.

△ Designs and executes initiatives to move the organization toward its vision.

△ Thinks creatively, strategically and in an entrepreneurial fashion.
Leadership and Influence

- Builds common ground, convergence and consensus about future direction of the organization, economic development initiatives, etc.
- Exhibits strong executive presence as reflected by behavior, appearance, demeanor and posture.
- Effectively and articulately delivers presentations, proposals, reports, etc., to stakeholder groups; has effective public, group and one-on-one communication skills.
- Thinks and responds effectively in real time and "off the cuff."
- Listens to others’ ideas and opinions; practices active listening.
- Uses a thoughtful and deliberative decision-making style, weighing risks and impacts on stakeholders.
- Collaborates, supports and shares credit for success with staff and stakeholder groups.
- Acts in a collaborative, confident and calm manner in a variety of situations, including when under pressure.
- Understands the emotions of others and understands how own behaviors affect others.
- Acts as an ambassador for the economic development organization and for the community; is politically savvy.
- Proactively manages the media.
- Manages expectations of stakeholder groups, balancing optimism and realism.
Executive Competency Model

Management Skills

△ Develops and uses a “system” to track, document, shepherd and guide economic development projects from inquiry to completion. Keeps the “system” current.

△ Analyzes the workload in the “system” relative to organizational capacity, establishes priorities, manages work assignments and periodically increases/decreases capacity.

△ Attracts, retains and develops top talent.

△ Establishes clear performance expectations, including results to accomplish, metrics to achieve and processes to follow.

△ Delegates, supports and monitors the performance of direct reports. Provides guidance as needed.

△ Develops direct reports and ensures ongoing development of others in the organization. Provides useful feedback about accomplishments, strengths, development areas and developmental recommendations.

△ Recognizes direct reports’ growth potential and encourages professional development.

△ Manages meetings effectively, including provision of agenda, supporting material and meeting notes.

△ Develops and manages to a budget.

△ Provides direct and, at times, tough messages to stakeholder groups and does so respectfully without “burning bridges.”
Executive Competency Model

▲ Relationships and Teaming

▲ Develops effective relationships and open channels of communication with each stakeholder group, owners of potential projects, resource groups, media, etc.
▲ Understands the needs, goals and motivations of external stakeholder groups (i.e., the community) as well as internal supervisors, peers and direct reports.
▲ Identifies and proactively manages competing needs, goals and concerns among stakeholder groups and communities.
▲ Works effectively with business owners, executives, elected officials, etc.
▲ Recognizes, articulates and resolves conflicts and differences of opinion among stakeholder groups.
▲ Manages own emotions and responds effectively to strong emotional reactions of others.
▲ Builds an effective executive team within the organization.
▲ For each staff member, knows strengths and areas of development.
▲ Works effectively with stakeholder groups (e.g., special interest groups, workforce development, community colleges, universities, hospitals, research institutions, citizen groups, etc.).
Responsibility and Achievement

(Self Management, Ethical Integrity)

△ Demonstrates strong personal commitment to the organization and its long-term success.
△ Demonstrates the importance of confidentiality with all stakeholders.
△ Possesses a strong sense of personal integrity, duty and responsibility. Upholds ethical practices.
△ Has a high level of personal energy.
△ Manages time effectively and in relation to priorities.
△ Engages in continuous learning.
△ Conveys confidence, passion and poise.
△ Recognizes, regulates and manages own emotions and stressors.
△ Performs tasks outside the normal role as needed.
Professional Competency Model

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Professional Competency Model

▲ Analysis and Decision-Making Skills

▲ Understands, follows and implements organizational strategy.
▲ Thinks and acts like a generalist with a broad perspective. Willingly draws data from many disciplines and on a diverse range of principles when evaluating situations and making decisions.
▲ Understands complex and complicated situations.
▲ Solves problems, understanding the impact of various alternatives from multiple perspectives.
▲ Takes reasonable and appropriate risks.
▲ Considers the bigger picture and pays attention to detail.
▲ Reflects on past projects and learns from After Action Reviews and Postmortems.
Professional Competency Model

Communication Skills

- Understands the audience and understands goals, objectives and motives within the audience.
- Communicates clear verbal and written messages to others.
- Has effective and persuasive presentation and platform skills.
- Writes effectively for business owners, executives, the general public, traditional media, social media, etc.
- Uses computer technology of the day, including common office software programs and social media.
- Knows the structure and content of the English language, the meaning and spelling of words, rules of composition, grammar, etc.
Professional Competency Model

Industry Understanding

- Has an interest in and attraction to economic development.
- Has the motivation and passion to learn the industry.
- Can credibly speak the language of economic development, finance, job creation, fundraising, etc.
- Develops deep insight into the strengths and weaknesses of the geographic area served and its economic development needs. Maintains facts, figures, trend data, etc. to articulate this insight.
- Stays abreast of trends, models, financing vehicles, etc. as they emerge in the industry.
- Participates in professional organizations and continues own professional development on an ongoing basis.
- Adopts a long-term perspective, especially when considering economic development trends and new services to provide.
- Executes initiatives to move the organization toward its vision.
- Thinks creatively, strategically and in an entrepreneurial fashion.
- Brings innovative ideas and processes to the organization.
Professional Competency Model

▲ Leadership and Influence

▲ Possesses strong public presence; is confident working in the public arena.
▲ Demonstrates the ability to use data, logic-based arguments and persuasive communication to bring others around to own point of view.
▲ Actively manages conflict by having critical conversations with appropriate stakeholders.
▲ Uses a thoughtful and deliberative decision-making style, weighing risks and impacts on stakeholders.
▲ Successfully facilitates groups to move the group and a project forward.
▲ Effectively negotiates deals, criteria, processes, participants, timelines, etc.
▲ Balances groups with strong differences of thought and opinion effectively; looks for common ground; keeps them in dialogue.
▲ Stays on track in difficult, surprising or unexpected situations.
Professional Competency Model

▲ Relationships and Teaming

△ Acts in a collaborative and relational manner.
△ Understands and respects the positions and perspectives of others.
△ Balances inquiry and advocacy in interpersonal style.
△ Works well with a wide range of people from executive and high-status officials to assistants and support team members.
△ Manages own emotions and manages the strong emotional reactions of others that honors their input and minimizes the affect of their emotions.
△ Demonstrates humility, modesty and commitment to positive team climate.
△ Listens to others and integrates the ideas of the group.
△ Establishes rapport quickly; builds relationships and maintains them over time.
△ Listens effectively and knows when to speak out and when not to.
△ Networks effectively and maintains and builds a solid network of resources.
△ Serves as a trusted advisor to co-workers.
Professional Competency Model

△ Responsibility and Achievement
(Self Management, Ethical Integrity)

△ Exhibits a strong sense of personal integrity, ethical duty and responsibility.
△ Maintains confidentiality with all stakeholders.
△ Illustrates a sense of urgency and tenacity to help achieve results in the community.
△ Is results oriented, demonstrates tangible and measurable outcomes.
△ Makes efficient use of time, establishes personal and organizational priorities without outside motivation.
△ Conducts self in a professional manner, including both behavior and appearance.
△ Demonstrates motivation and drive to execute projects.
△ Reveals a strong character, will work hard to accomplish tasks even when faced with challenges and criticism.
△ Has a hunger to learn, grow and develop.
△ Reveals a high level of personal energy; invigorated by a fast pace of work.
△ Exhibits personal commitment to the vision and strategy.
△ Demonstrates a public service mentality and attitude.
△ Organizes and plans daily tasks and duties effectively.