

## Organizational Leader's Leadership Competencies Assessment Technique

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# Organizational Leader's Leadership Competencies Assessment Technique

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*We developed a three-phase assessment technique to define Extension administrators' leadership competencies. The new three-phase leadership assessment technique can help maximize the individual's contributions, foster creative small group discussion, and share group vision. However, this tool could be applied to groups of 9-12. Our technique can be implemented within Extension and other organizations to determine future leadership skills needed among top organizational leaders.*

*Keywords:* qualitative needs assessment technique, leader competencies, leadership competencies, leadership competencies assessment technique

## Introduction

The article aims to introduce readers to the newly developed, three-phased leaders' competencies assessment technique. We believe this technique helps maximize individuals' contributions, foster dynamic small group discussion, and share small group vision with a larger group. This assessment can help identify leadership development needs among top organizational leaders.

## Why Did We Develop the Assessment Technique?

A systematic process of needs assessment for health and human services and education has been used in the United States since 1960 (Witkin, 1984). Cooperative Extension organizations use different approaches to identify assets and needs and develop and deliver educational programs. The traditional approach to needs assessment methodology has been widely criticized since the 1970s (Alschuld, 2015; Altschuld & Kumar, 2010). Major concerns include the following: fully quantitative, costly, negative connotation of needs assessment, which does not inspire an uplifting environment, and voices of the target population are not included in the assessment. Cooperative Extension has investigated leadership development for both county Extension educators (Argabright et al., 2019; Benge et al., 2011; Benge & Sowcik, 2018; Lakai et al., 2014; Ricketts et al., 2012) and state specialists (Radhakrishna, 2001). However, a gap in the literature was identified related to professional development needs and assessments for Extension administrative positions. Leadership needs assessment of Extension administrators should be a concern for the modern Extension organization (K. Cason, personal communication, October

2018). Due to a lack of needs assessment research on the leadership competencies of top leaders in Extension, we developed a qualitative approach to help Extension administrators better understand the leader (intrapersonal) and leadership (interpersonal) competencies needs of developing future thriving Extension leaders. Day (2000) distinguished leader (intrapersonal) and leadership (interpersonal) development. The authors emphasized “a general need to link leader development, primarily based on enhancing human capital, with leadership development that emphasizes the creation of social capital in organizations” (p. 581). In 1999, Lepak and Snell indicated that organizations primarily invest in a leader’s training and development to enhance and protect their human capital and emphasize individual-based knowledge, skills, and abilities associated with formal leadership roles. Day (2000) described leadership development as “an integration strategy by helping people understand how to relate to others, coordinate their efforts, build commitments, and develop extended social networks by applying self-understanding to social and organizational imperatives” (p. 586). Day’s leader (intrapersonal) and leadership (interpersonal) development approach helped us to develop an assessment tool with both components.

### **A Three-phase Assessment Technique**

Our qualitative assessment technique is a three-phase methodology. The technique capitalizes on an individual participant’s contribution in assessing leaders’ and leadership challenges and competencies needs. In the first phase, participants reflect on four questions at the individual level related to their leader and leadership development based on their experience. During the second phase, participants have small and large group discussions about the team leaders’ challenges. During the third phase, participants work in small groups, assessing organizational leaders’ competencies and skills needs; then, they discuss with large group participants. During the analysis phase, the facilitator independently evaluates participants’ responses and synthesizes them into common themes. This approach helps to connect each participant’s past leadership experiences, discuss the leadership team’s challenges, and identify the competencies and skills needed for Extension administrators in their state. The five leading experts in the Extension field reviewed developed questions to establish instrument face and content validity. The leaders’ competencies assessment technique steps are further described in Table 1. The facilitator should welcome the participants and introduce them to the format of the technique. The welcome should include the introduction, and the three phases of the session can be completed in 90 minutes. We also recommend using the technique with groups of nine to 12 participants. A facilitator guide and a participant worksheet are presented in Appendix A and Appendix B.

**Table 1. Steps in Conducting the Leader (Intrapersonal) and Leadership (Interpersonal) Competencies Need Assessment**

Step	Time allotted
Face-to-face session	
<i>Introduction</i>	
1. Review the facilitator guide (see Appendix B).	Before the session
2. Establish and provide a comfortable meeting environment.	
3. Describe the purpose of the session.	5 min
4. Introduce the audience to the technique and provide the participant worksheet (see below, Table 1).	
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<i>Phase 1 – Reflect on experience with a leader (intrapersonal) and leadership (interpersonal) development.</i>	
Individual work: Give participants 4 minutes to address each question. Have them write their answers on the participant worksheet.	16 min (for four questions)
1. Looking back over your life, what experience are you most proud of as a leader?	
2. What was your most disappointing experience as a leader?	
3. List your top 5 leadership activities as an Extension program leader in a year.	
4. In what ways do you feel you could have improved in the category of personal growth as a leader?	
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<i>Phase 2 – Assessing the team leader's challenge (interpersonal level)</i>	
Small group work: Give small groups 10 minutes to discuss each question. Have them write their response on their worksheets.	20 minutes (for two questions)
1. What leadership challenges have you faced being a team leader?	
2. What factors accounted for these challenges working in a team?	
Large group discussion: Give the large group 5 minutes to discuss each question related to the leader's challenge.	10 min (for two questions)
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<i>Phase 3 – Leader's competencies need (interpersonal level)</i>	
Small group work: Give small groups 10 minutes to discuss each question. Have them write their response on their worksheets.	20 min (for two questions)
1. What are the most important skills/competencies that will help improve your leadership teamwork?	
2. What contributes to being a thriving Extension leader in the State (portrait of a thriving leader: skills, abilities, traits)?	
Give each small group 3 minutes to present the results of their discussion on "Competencies of a future thriving leader at [State] Extension" to the large group.	9 min (for three small groups)
Large group discussion: Give the large group 5 minutes to discuss each question related to the leaders' competencies and needs.	10 min
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After session	
Analyze participants' responses and share the results.	
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## Leader's Competencies Assessment Technique: Benefits and Challenges of Using

In our experience, we found that the leaders' competencies assessment technique has the following benefits:

- It allows practitioners to distinguish between the leader (interpersonal) and leadership (interpersonal) competencies needs.
- It capitalizes on individuals' insights while also optimizing contributions by small and large groups.
- Identifying the positive qualities of a leader provided a more positive connotation and environment for the needs assessment.
- Our assessment tool is only effective when it is result-focused and provides evidence. This evidence can be used to determine which of the possible competencies are most effective and efficient for achieving the desired results.

We have found that implementing the technique has some challenges:

- Preparation is the key, and it is time-consuming.
- Richer data may have been gathered with a longer session.
- The lack of time to discuss how funds may be identified and used to address challenges weakened the strength of the assessment report.

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## Appendix A

### Participant Worksheet

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**Phase 1:**

Reflect on experience with the leader (intrapersonal) and leadership (interpersonal) development (total time 16 minutes).

Looking back over your life, what experience are you most proud of as a leader? Capture a few details here (1-2 examples). (4 min) (*Individual work*).

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What was your most disappointing experience(s) as a leader? Record your thoughts in the space below. Provide 1-2 examples. (4 min) (*Individual work*).

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List your Top-5 leadership activities as the Extension program leader in a year. Write your Top-5 leadership activities below. (4 min) (*Individual work*).

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In what ways do you feel you could have improved in the personal growth category as a leader? Record your thoughts in the space below. (4 min) (*Individual work*).

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**Phase 2:**

Team Leader's Challenge (total time 30 minutes).

Please think about challenges you have faced when working as a team leader. Please list the challenges below. (10 min) (*Working in small groups*).

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What factors accounted for these challenges when working in a team? Please list them below. (10 min) (*Working in small groups*).

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Large group discussion on team leader's challenge. (10 min)

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**Phase 3:**

Identifying future leader's competencies need/creating a thriving leader's portrait (total time 39 minutes).

Please list several of the most important things and skills that will help improve your team leadership. Please list skills here: (10 min) (*Working in small groups*).

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What contributes to being a thriving leader in Extension (i.e., a profile of a thriving leader: skills, abilities, traits)? Please write down at least 5. (10 min) (*Working in small groups*).

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*Note to the facilitator: If using this assessment technique with another organization, replace the word "Extension" with your organization's name.*

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## Appendix B

### Facilitator Guide

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**Materials needed:** printed participant worksheets, pens for each participant, three large Post-it sticky note pads, and at least three jumbo markers

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1. Establish and provide a comfortable meeting environment. Describe the purpose of the session, and explain the protocol for Phases 1, 2, and 3. Provide the participant worksheet. Answer any questions participants may have. Remind them that they will be able to refer to the instructions on the worksheet (see Table 2). (5 minutes)
  2. Use a stopwatch to keep the session on time. This is important because of the number of tasks participants are working on completing. We included times here in the facilitator guide and Table 1 in the text.
  3. Phase 1. Ask participants to work individually by reflecting on their personal experience with the leader and leadership development. (16 minutes)
  4. Phase 2. Ask participants to work in small groups and discuss the leader's challenges. (30 minutes)
  5. Phase 3. Ask participants to work in small groups to identify the leadership competencies of a future thriving leader at your organization. Tell each group to assign a scribe. Ask them to write their results on one of the Post-it notepads. After, have each group place their Post-it on a wall in the room. Tell each group to assign a presenter to read their results to the group. Then, lead a large group discussion on outcomes. (39 minutes)
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*Note: Only one facilitator is needed to facilitate the leadership assessment.*

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