How to use skill-based assessment tasks

6 steps for using skill-based assessment tasks in recruitment and promotion to improve gender equality and representation

A guide for hiring managers, HR, and Diversity and Inclusion leads

This guide is part of the 'How to improve gender equality' toolkit

THE
**BEHAVIOURAL
INSIGHTS
TEAM**

The recommendations we provide are based on the best available evidence and the latest thinking from practitioners and experts in organisational behaviour and behavioural economics.

This guide is one of five in the 'How to improve gender equality' series:

- How to set effective targets
- How to establish diversity leads and diversity task forces
- How to run structured interviews
- How to use skill-based assessment tasks
- How to increase transparency of progression, pay and reward processes

To understand other approaches which are effective at improving equality, see our summary of evidence-based actions for employers.

For more information see the sources listed in the bibliography or contact gabiprogramme@bi.team.

Checklist

1. Review the skills required for the job

2. Develop a number of tasks which you will use to assess candidates

3. Develop criteria for assessing candidates' responses to the tasks

4. Prepare for the assessment of candidates

5. Conduct and score the assessment

6. Collect data over time to see if there are any disparities

Skill-based assessment tasks matter

Skill-based assessments require candidates to show how they would handle important tasks or problems actually encountered on the job.[1] They can involve work sample tasks, situational judgment tests, simulation exercises or assessment centres. The aim is to give candidates an opportunity to *demonstrate* their skills rather than just *talk* about their skills.

Different candidate assessment methods have different strengths and weaknesses. Interviews alone may not give all candidates a good opportunity to demonstrate their suitability for a role. Skill-based assessment tasks can increase the quality of recruitment processes, and it may help to combine these with other recruitment approaches to minimise bias. Skill-based assessment tasks and structured interviews share some features and both are intended to minimise bias and increase fairness. See the Structured interviews guide for more information on designing and implementing structured interviews.

The main benefit of skill-based assessment tasks is that they give a more accurate idea of a person's ability to perform the role. When they are designed and delivered carefully, they also have the potential to reduce gender bias in the recruitment and promotion process.[2]

This guide provides employers with a summary of the evidence on how skill-based assessment tasks should be designed so that they are more effective.

Definitions[3]

Work sample task: Candidates are asked to produce a piece of work typical of the day-to-day tasks they would have to do in the job. For example, an applicant to a research organisation might be asked to summarise a collection of reports. An applicant for an administrative role might be asked to respond to a number of example emails. These tasks assess candidates' skills and quality of work.

Situational judgment test: Applicants are presented with descriptions or vignettes of job-related situations and possible responses to these situations. Applicants have to indicate which response they would choose. These test the appropriateness of candidates' judgments in challenging situations.

Simulation exercise: Actual tasks typically encountered in the job are recreated and candidates are required to complete them as if they were performing the task in the job. These scenarios can be presented through role play, on paper or via a computer, or by watching videos. These exercises test candidates' behaviours and responses to realistic recreations of typical workplace encounters.

Assessment centre: A process involving multiple tasks, multiple assessors, and the use of simulation exercises to test how well a candidate is able to perform a role.

The steps in this guide will help you introduce skill-based assessment tasks to the recruitment processes at your organisation.

How to use skill-based assessment tasks for recruitment and promotions

Step 1: Review the skills required for the job[4]

Create a list of the tasks that will be required in the role.

Consider both the tasks themselves (e.g. greet and offer service to customers; read and summarise information from a number of sources) and the degree of knowledge, skills, abilities and qualities they require. For example, if the role involves reading or writing, what level of reading is needed? If the role requires working with a team which is geographically spread out, what abilities would you like this employee to have so that they encourage good team working?

If an existing employee is in the role, ask them and their colleagues to describe their full range of tasks. Do not stop there, however. Challenge yourself and your team to consider alternative ways of doing the role.

If the role is new, try to imagine various aspects of the position. For example, will they have internal and external-facing functions? Will they need particular technical skills? Will they need to make specific contributions to team working or management?

"You will stand the best chance of reducing differences in success rates for candidates on the basis of gender or other characteristics if you assess a mixture of skills"

Step 2: Develop a number of tasks which you will use to assess candidates

Compile a list of relevant assessment activities which resemble the list of real-life situations, knowledge, skills and abilities you identified in Step 1.

Prepare to test candidates on a range of relevant tasks. You will stand the best chance of reducing differences in success rates for candidates on the basis of gender or other characteristics if you assess a mixture of skills.[5] For example, be sure to test both technical capabilities and interpersonal interactions if the job role requires both.[6]

Simulate a real-life situation as best you can. This makes it easier for a diverse range of candidates to perform well.[7] For example:

- For a customer-facing role you could use a roleplay situation that requires the candidate to resolve a challenging customer interaction.

- For a role which requires pulling together information from different sources and responding to a range of demands, you could run an 'in-tray' (or digital 'e-tray') exercise.

- For a role which requires software development, ask candidates to create a product prototype.

- For a leadership role which requires strategy development and communication skills, you could ask candidates to prepare a brief presentation on their strategy for the team.
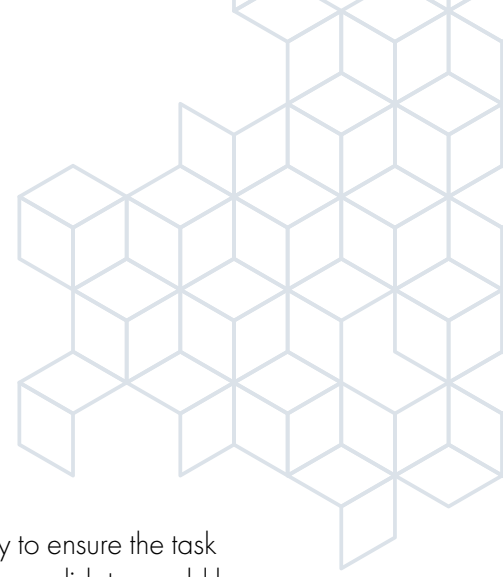
Make sure the tasks are easy to understand. Even if the task itself is complex, it needs to be explained clearly. Give the candidate the opportunity to ask questions as well, to clarify what the task requires them to do. All of this reduces the amount of an applicant's concentration which is taken up with trying to understand the assessment environment, alongside the overall stress of the assessment procedure and pressure to perform well. This in turn makes it more likely the assessors will be able to see the candidate's true level of skill.

When planning a task, try to ensure the task mimics the actual task the candidate would be performing in the job. For example, if the job will primarily require the successful candidate to have verbal interactions with customers, the assessment task should involve the candidate giving verbal responses, and not written responses.

Test tasks with others. This will help you to see whether any tasks do not make sense or unintentionally place some groups at a disadvantage. Get a diverse range of perspectives. You should seek feedback from, for instance, people of different genders, ethnicities, cultures, ages, sexualities, disabilities and educational backgrounds.

How much time should candidates be given?

When designing tasks, consider whether they can be completed in the candidate's own time, or in a more controlled and timed environment (whether this is done remotely, or in-person if the candidate is visiting your office for the assessment).

For instance, you could email a task to candidates and require a response back one week later. This allows the candidate to spend as much or as little time on the task as they are able to commit, ahead of the deadline. However, this could disadvantage those with caring responsibilities, who may have less spare time to dedicate to the task.

Alternatively, you could let the candidate know in advance that they will have a dedicated time window to complete the task, and agree with them when they will receive it and return it – this makes sure all candidates have the same notice, and the same length of time to complete the task, whilst still allowing some flexibility based on the individual's schedule.

Step 3: Develop criteria for assessing candidates' responses to the tasks

Assess candidates' task responses using pre-defined marking criteria. This way, all candidates are judged against the same standards.

Based on the tasks you have developed, determine in advance what you think appropriate responses will include – these should be the key elements and behaviours you would like candidates to demonstrate. For instance, depending on the task you might want to score candidates based on their accuracy, creativity, communication or teamwork skills, or ability to meet deadlines or work at pace.

Ensure the scoring criteria are not too complex or long, otherwise this will make it hard for assessors to judge responses.

Do not rule out the possibility of getting answers you had not anticipated but which are still good. This is likely to happen if your applicants come from diverse backgrounds – they may have new ways of approaching things that you might not have considered.

Step 4: Prepare for the assessment of candidates

Provide candidates with clear and simple information about the assessment process, whether you are conducting the process in person or remotely. This helps them know what to expect. This sort of clarity can be beneficial for everyone, particularly under-represented groups.

Consider when you will give candidates preparatory materials and instructions. Where possible, provide candidates with the materials well ahead of time so that they can prepare and familiarise themselves with the tasks.[8] Invite them to get back to you with any questions they might have ahead of the assessment. Providing materials at least one week ahead ensures that candidates with less time to prepare, for instance those with childcare responsibilities, are not disadvantaged.

By reducing the pressure created by uncertainty, you will create a more level playing field for applicants. Uncertainty in assessment contexts can reduce diversity as it disproportionately affects some people more than others.

"Do not rule out the possibility of getting answers you had not anticipated but which are still good"

Step 5: Conduct and score the assessment

Ideally all candidates should be presented with the same tasks in the same order and with the same time constraints (but making reasonable adjustments if, for example, a candidate requires it due to disability).

More than one member of staff should be involved in the scoring so that multiple perspectives on a candidate's performance are included.

If there are multiple tasks, assessors should assign a score for a task directly after the candidate has completed it. Do not save all the scoring for the very end, as it will be difficult to remember people's performance.

After all tasks are completed and the candidate has left, assessors should not discuss their opinions of the candidate until all scores have been assigned. Discussing the candidates before this point makes assessors more likely to be influenced other assessors' opinions, and potentially by the opinion of the most senior person there.[9] The point of having multiple assessors is that it is closer to "the wisdom of crowds" – multiple viewpoints should lead to a fairer and more accurate result on average.

Following the task assessment, each assessor should add up their scores across all tasks, as well as any structured interviews, to get their total score. Collate these total scores and average them. This will allow you to find the candidate with the best overall score, which will be a strong indicator of the best candidate. You should then discuss the candidates on this basis.

You may choose to combine skill-based assessment tasks with other assessment methods before you hire. See the Structured Interviews guide for more information on other methods.
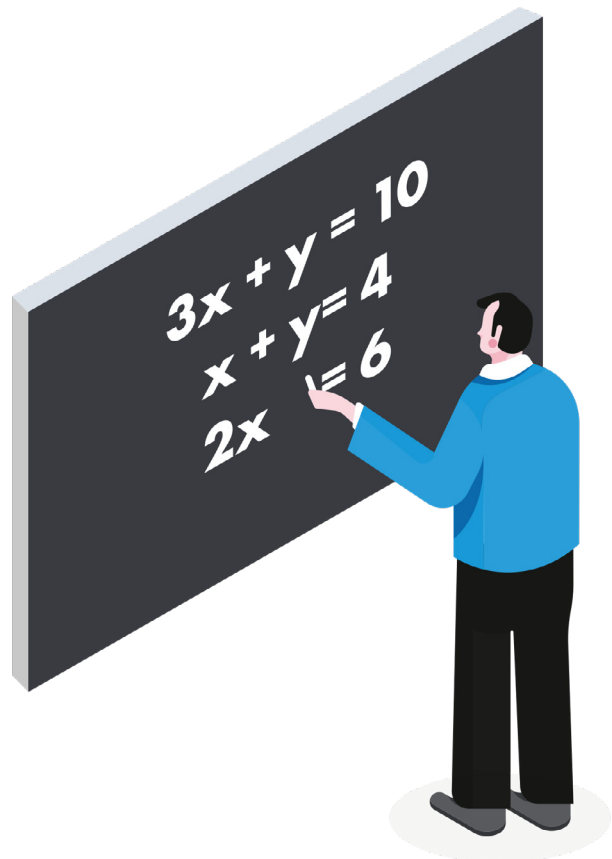
Step 6: Collect data over time to see if there are any disparities

Put in place an ongoing process for developing and improving your skill-based assessment tasks. This might include seeking feedback from candidates about their experience of your process.

Track whether there are any differences in the outcomes of different aspects of your recruitment process for women or minority groups over time.[10] For example, look to see whether there is a difference in success rates of women and minority groups when you give applicants 24 hours to return a test compared to one week. You can also track whether women are being hired in proportion with the size of the applicant pool at different grades in the organisation. See Eight ways to understand your gender pay gap for more information.

If you find a disparity, examine your tasks and assessment criteria and ask yourself where in the process biases could be causing this, and what you could change to reduce any disparities.

What evidence have we used?

This guidance is based on the best available evidence currently. Where possible, we have used evidence based on randomised controlled trials that were conducted in the field and that measure objective outcomes.

It is important to acknowledge that high quality evidence on the issue of gender equality in the workplace is not as common as it is for many other issues. Researchers are endeavouring to generate high quality evidence of what works to improve equality.

The following list of sources informed this guide, though it is not exhaustive. The advice was also informed by practitioner and expert insight.

"Put in place an ongoing process for developing and improving your skill-based assessment tasks"

Endnotes

1   Ployhart, R. E., Schneider, B., & Schmitt, N. (2006). Staffing organizations: Contemporary practice and theory. Mahwah, NJ: Lawrence Erlbaum Associates.

2   Ployhart, R. E., & Holtz, B. C. (2008). The diversity–validity dilemma: Strategies for reducing racioethnic and sex subgroup differences and adverse impact in selection. *Personnel Psychology, 61*(1), 153-172.

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3   International Taskforce on Assessment Center Guidelines. (2015). Guidelines and ethical considerations for assessment center operations. *Journal of Management, 41*(4), 1244-1273.

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5   Hararia, M. B., Viswesvarana, C., & O'Rourke, R. (2014). Gender differences in work sample assessments: not all tests are created equal. *Revista de Psicología del Trabajo y de las Organizaciones, 30*(1), 29-34.

   Roth, P. L., Buster, M. A., & Barnes-Ferrell, J. (2010). Work sample exams and gender adverse impact potential: The influence of self-concept, social skills, and written skills. International Journal of Selection and Assessment, 18(2), 117-130

6   Bobko, P., Roth, P. L., & Buster, M. A. (2005). Work sample selection tests and expected reduction in adverse impact: A cautionary note. *International Journal of Selection and Assessment, 13*(1), 1-10.

7   De Soete, B., Lievens, F., Oostrom, J., & Westerveld, L. (2013). Alternative predictors for dealing with the diversity–validity dilemma in personnel selection: The constructed response multimedia test. *International Journal of Selection and Assessment, 21*(3), 239-250.

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9   The Behavioural Insights Team (2017) A review of optimism bias, planning fallacy, sunk cost bias and groupthink in project delivery and organisational decision making

   Kahneman, D. (2011). Thinking, fast and slow. Macmillan.

10 Filip L. and Klimoski, R. J. (2001) Understanding the assessment center process: Where are we now?. International Review of Industrial and Organizational Psychology. 16, 245-286.

Further reading

Gender & Behavioural Insights Programme
by The Behavioural Insights Team.

How to improve gender equality in the workplace

Cabrera, M. A. M., & Nguyen, N. T. (2001). Situational judgment tests: A review of practice and constructs assessed. *International Journal of Selection and Assessment, 9*(1-2), 103-113.

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