Leadership INSIGHT

Identify **Select** **Develop**

Candidate Assessment Report

Michael Scott

2/8/2018

INSIGHT
WORLDWIDE

Executive Director
Report for Michael Scott

2/8/2018

Introduction

Leadership development both guides and fuels the success of organizations because they will take on the personality of their leaders. Leadership training and development can maximize productivity, shape a positive culture and promote harmony. To achieve this, key people must lead individuals and teams using an appropriate leadership style. Few decisions will have greater reward, or risk than identifying those leaders who are most likely to successfully expand their responsibilities and contributions.

This report describes the suitability for this specific candidate for a leadership position in Senior Living. The information in this report is derived from two parts; first the results of the Leadership Assessment completed by each candidate and secondly, the scores from the structured interviews that were conducted by our executive team. Both of these results have been combined to produce an Overall Leadership Potential score, in addition to providing individual scores on five key competencies for success in a leadership role. These key competencies were derived and identified as a result of multiple focus group interview sessions with subject matter experts within the Senior Living industry.

The following are the five key competencies for leadership:

Adaptability - Measures how well a candidate adapts to changes in assignments and priorities; how well they adjust their work methods in response to new information, changing conditions, or unexpected obstacles; whether they approach change in a proactive and constructive way; and if they engage in effective crisis management.

Building Trust and Accountability - Assesses how well a candidate interacts with others in a way that instills confidence in his or her motives and integrity; whether they represent the organization in a trustworthy way; and if they keep promises and commitments in their day-to-day work.
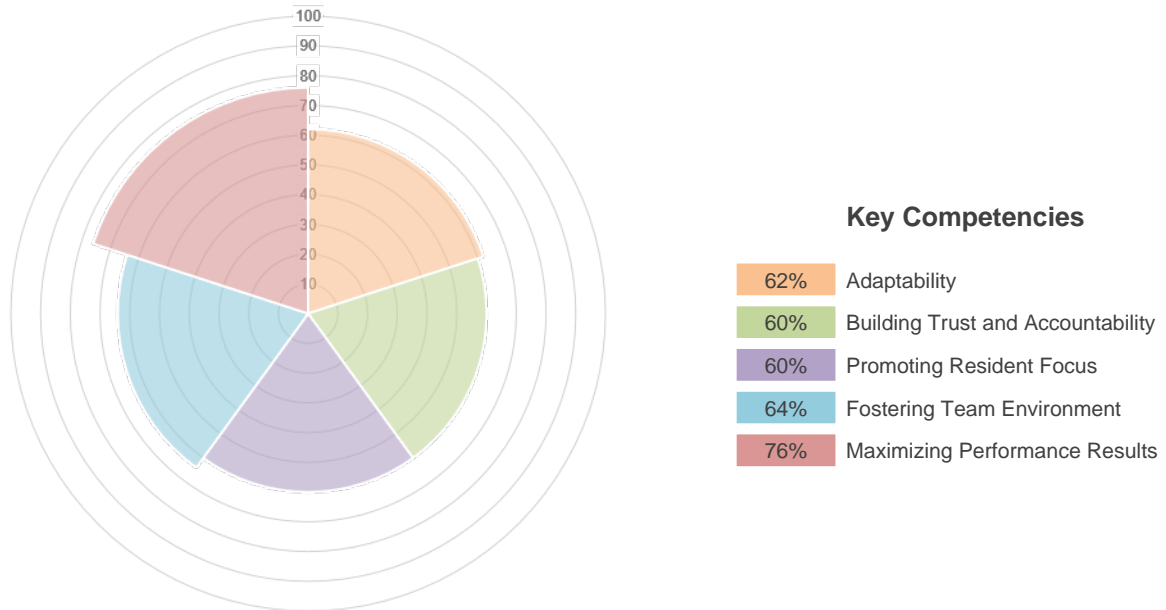
Promoting Resident Focus - Gauges how well a candidate makes residents and their needs a primary focus of one's actions; whether they show interest in and understanding of the needs and expectations of residents and related stakeholders (e.g., family members); and if they are mindful that the facility represents the residents' home when carrying out day-to-day work duties.

Fostering Team Environment - Assesses how effectively the candidate manages team resources; whether they provide timely feedback concerning team progress and facilitate team reflections; and if they establish conditions that prevent, control, or resolve conflict among team members.

Maximizing Performance Results - Evaluates whether a candidate has a clear understanding of the business goals, the operative environmental conditions, and the available resources of the facility and broader organization, and whether they constantly seek ways to improve business processes.

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Overall Leadership Potential Score
64%

Key Competencies

|	
62%	Adaptability
60%	Building Trust and Accountability
60%	Promoting Resident Focus
64%	Fostering Team Environment
76%	Maximizing Performance Results

How to use this report

First consider the Overall Leadership Potential score for each candidate. This overall score factors in all of the key competency scores from the assessment completed by the candidate and the results from the individual structured interviews. In addition to comparing the Overall Leadership Potential scores, in a similar manor compare the scores for the five key competencies, evaluating each candidate for the best fit for the organization's needs.

Following the actual scores is a section describing in detail the individual candidate results. This Leadership Report is a valuable tool for helping to better understand individual potential for leadership roles. This report provides insights regarding an individual's leadership potential and their development opportunities.

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Key Competency Scores
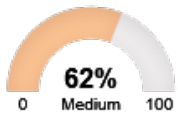
Adaptability
Medium competency score

62%
0 Medium 100

Likely to adapt to changes in schedule or routine as needed. Understands the importance of maintaining a calm demeanor in hectic or difficult times and strives to do so. Will collaborate with a few key trusted team members, especially when encountered with a novel or unfamiliar situation, but ultimately addresses workplace issues and challenges independently. Has some difficulty in determining how to drive collaboration with team members toward a decisive outcome.

Supporting Sub Competencies

Participative Leadership
Typically takes charge in making decisions and addressing issues, but keeps team members in the loop and sometimes solicits input during the process. Delegates responsibilities to a selected few team members who have demonstrated excellence in completing tasks. Likely to collaborate with team members to address issues and problems after they have occurred.

Autonomous Leadership
Will rely on past experiences and behavioral patterns when addressing familiar situations, but does show some ability to adapt and try novel approaches when faced with complex or new challenges. Recognizes unique strengths and weaknesses of team members, and typically tailors communications and interactions accordingly.

Crisis Management
Able to take action and command in a crisis or emergency situation, and is typically able to react calmly. Tends to focus on resolving the crisis in front of them and has limited or some view of long-term implications of those actions. Shows moderate levels of stress tolerance and is able to handle a dynamic and sometimes unexpected work environment.

Confidence and Credibility
Displays some motivation to learn and develop in their role, but this tends to be secondary to completing tasks and resolving immediate problems. Behaves professionally and is comfortable making decisions but does not always solicit input from others when doing so. Shows some respect to employee expertise and sometimes encourages employees to voice opinions and exchange ideas.

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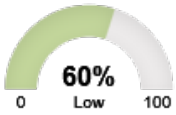
Building Trust and Accountability
Low competency score

60%
0 Low 100

Will have difficulty or shows little interest in developing relationships with others at work, focusing solely on tasks and individual achievements. Does not have deep knowledge of individual employees' strengths, weaknesses, and work styles. Tends to ignore demonstrated expertise and interests of employees when assigning tasks and projects to them. Will have difficulty or show little interest in effectively managing and responding to employees' emotions. Does not show great passion for their own work and is not interested in acting as a role model to other employees. In stressful or difficult situations, has difficulty managing their own emotions, responding negatively or withdrawing. When things do not go as planned, tends to evade the responsibility.

Supporting Sub Competencies

Trustworthiness
Adheres to codes of conduct and ethical principles in most situations, adopting a "by the book" strategy to ensure that people are treated fairly. Is generally accountable for their own actions and strives to be dependable.

Role Modeling
Recognizes their own behavior as a way for guiding employee behaviors, although at times does not seem to hold themselves to a higher standard. Typically embodies company regulations, rules, and cultures through their behavior. Has some passion for how they approach their work, but is mostly focused on completing tasks effectively and accurately.

Emotional Intelligence
Recognizes the importance of managing one's emotions in the workplace and takes steps to remove themselves from a situation when this becomes difficult. Regularly seeks to understand the motivations and behaviors of others before jumping to conclusions.

Warmth
Exhibits concern and caring for the people around them, although this is secondary to accomplishing core tasks. Maintains a friendly demeanor whenever possible. Conveys an open door policy and encourages others to see them as a confidant.
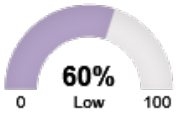
Promoting Resident Focus
Low competency score

Rarely interacts directly with residents, leaving this to other members of the team. Focuses more on completing tasks related to their role than on ensuring ongoing satisfaction and well-being of residents. Tends to have poor customer service skills, showing little interest in understanding the perspectives and challenges of residents. When managing resident requests directly, most likely will take a short-term approach, tending to act in ways that will result in immediate resident satisfaction or resolving of the request without consideration about long-term implications for resident satisfaction, safety and well-being.

Supporting Sub Competencies

Resident Advocate
Recognizes importance of resident satisfaction as key aspect of business success and compels employees to perform accordingly. Is comfortable interfacing directly with residents and works to provide them, both directly and indirectly, with regular updates and information pertinent to their experience. Recognizes that they cannot always grant resident requests and works to communicate openly when this is the case.

Feedback Seeking
Routinely uses formal means of collecting resident data (e.g., surveys) to determine how they can direct employees to improve the resident experience. Works to develop action plans based on resident data. Considers this data key indicators of how they are doing in their role.

Service Climate Building
Recognizes customer service as one of the major components of the role. Strives to make residents feel heard and values interacting with residents in a courteous, friendly manner. Shows greater competence in managing positive resident interactions than negative or more difficult ones.

Long-Term Focus
Routinely considers the long-term impact of their behaviors and decisions with regard to resident experience. Is comfortable telling residents "no" when their request presents a possibility of danger or risk, although their reasons are not always well communicated. Strives to make decisions that will benefit residents both immediately and in the future whenever possible, and at times seeks collaborative guidance from residents on how to strike this balance.

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Fostering Team Environment

64%
0 Medium 100
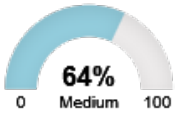
Medium competency score

Recognizes the importance of employee performance and behaviors on team and community functioning. Strives to understand and facilitate better performance from employees, but tends to focus on providing feedback and addressing issues with low-performing employees in particular. Will use formal methods (for instance, formal performance appraisal events) to better understand the work environment from employees' perspectives. Also will facilitate connections and collaboration among employees based on their impressions of the strengths and interests of those employees. When conflict among employees occurs, will try to appropriately and fairly address it, and resolve it quickly.

Supporting Sub Competencies

Collectivistic Outlook

Is focused on their own success and how the behaviors, actions and performance of their employees impact that success. Takes steps to perform their own job well but does not routinely engage in coaching or development for members of the team. Accepts lack of collaboration in the organization as "the way it is" and does not see value in breaking down barriers and encouraging cross-functional interactions and problem-solving.

Team Reflection and Feedback

Views continuous feedback delivery as a key component of their role, ensuring employees understand what is expected of them and how they are performing against expectations. Regularly reflects on their team, constantly seeking ways to improve internal operations. Demonstrates good understanding of team member strengths and weaknesses and allocates tasks and projects accordingly.

Conflict Management

Is very effective at resolving interpersonal conflict, maintaining a calm and competent demeanor. Is able to proactively address situations that may result in conflict, recognizing aspects of scheduling, task allocation, or other work factors that may lead to a dispute. When conflict arises, ensures day-to-day operations continue while also addressing the conflict in a way that provides a satisfactory resolution for everyone, or enabling the parties involved to resolve the conflict themselves. Effectively recognizes when a conflict is resolvable versus when it is not resolvable and other kinds of action must be taken. Employees on their team frequently walk away from conflict feeling that they have been heard.

Builds Psychological Safety

Considers themselves a confidant for employees, supporting an "open door" policy in which employees can speak freely and be heard. Encourages different work styles and ways of thinking, recognizing the impact of diverse problem-solving approaches on organizational success. Sometimes connects people facing similar challenges or situations, but for the most part tends to delegate tasks and projects according to individuals' roles.

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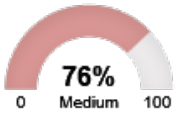
Maximizing Performance Results
Medium competency score

Understands the key objectives and goals of the larger organization and strives to perform in a way that will help the community support those goals. Creates action plans to change, shift or address processes and operations that seem ineffective. Will be an effective problem solver, able to analyze various parts of a situation to generate a solution. Communicates on a fairly regular basis with the corporate office but these communications tend to be focused on the needs of the community— and does not necessarily view the corporate office as a key partner in driving community success.

Supporting Sub Competencies

Results Orientation
Understands organizational objectives and their role in meeting those objectives, as well as the roles of other team members. Periodically reviews progress against goals (e.g., once or twice per year), working at these times with employees to understand where there may be barriers or challenges to goal attainment. Routinely helps employees translate their higher-level objectives to achievable goals for the different functional areas, ensuring there is alignment across the organization to their own areas of responsibility.

Innovation Orientation
When there is an issue, bottleneck or challenge perpetuated by the way the organization functions, they are comfortable seeking better, faster ways of doing this. Routinely checks in with employees to understand whether there are ways that processes, practices and operations can be improved. Tends to check in with corporate office to ensure innovative, new practices are approved before taking action to change an aspect of the organization.

Corporate Collaboration
Routinely leverages the resources and information provided by the corporate office, recognizing their role as a partner in helping the leader achieve their objectives. Sees the corporate office as an entity that facilitates or supports the goals of the community but does not focus on the other aspect of the relationship—how the community helps support the goals of the broader organization. Considers alignment and communication with corporate as their responsibility and does not routinely encourage employees to develop their own relationship with or understanding of the corporate office.

Problem-Solving Mindset
When confronted with a challenge or problem, they work to understand the problem from multiple perspectives. Is adept at dissecting problems into smaller parts, understanding how the different parts work together. They typically analyze these smaller parts in relation to situations they have encountered in the past and does not regularly use data or other external information to understand the nature of the problem. When confronted with a novel challenge not previously encountered, they have some difficulty in figuring out how to address it.

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Leadership Development Activity Plan

60%
0 Low 100
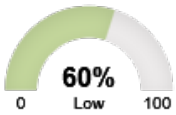
Building Trust and Accountability

Suggested Activity

- Write, distribute, and enforce an Ethics Policy in your workplace, and train in your leaders by modeling that behavior. Many ethical lapses can be attributed to an "everybody does it" mentality—ensure that ethical and moral decision-making is held up as the standard in your Communities. Mentor programs can help guide new leaders as they navigate difficult situations.

- Train your leaders on effective stress management techniques, including: when and how to de-escalate a situation by walking away; taking deep breaths to slow the body's natural stress response; getting enough sleep and regular exercise. A leader who can manage his or her emotions in a stressful environment is more easily trusted by staff.

- Encourage leaders to develop knowledge of team members and frontline staff. Breaking down barriers encourages relationship-building.

- Develop a participative leadership philosophy within the company. This is a managerial style that invites input from employees on all company decisions. This type of leadership style encourages relationship building, trust, and accountability between leadership and staff.

- Require "hands on" management. Instruct your leadership to spend sufficient amount of time each day outside the office interfacing with residents and staff.

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60%
0   Low   100
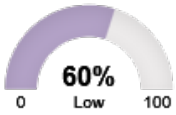
Promoting Resident Focus

Suggested Activity

- Require the new leader to conduct a focus group with residents and / or their families to better understand their needs and perspectives. Listening and processing information are critical leadership skills, and can be leveraged to improve competency in this area.

- Encourage leaders to be "hands on"—promote an environment where it is expected that leaders know the residents, and encourage relationship-building activities.

- Ensure your corporate culture values "service above self". This can be difficult to measure, since by its nature this Rotarian philosophy encourages sacrifice without reward, but leaders can be trained to watch for it. By asking your new leader to spot this behavior in his or her staff, you can help implement a shift in mindset to improve competency in this area.

- Utilize a mentor program to help guide new leaders on how to apply feedback to improve behaviors and practices between residents and staff, and between staff and leadership.

- Meet with Executive Directors from other Communities to learn about how they approached turning resident input into action.

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