



USA STAFFING

Assessment Workgroup Meeting

Tuesday, September 29th 2020

Agenda



11:00am-11:20am

Considerations around setting Minimum Passing Scores for AOs

Margaret Barton

11:20am-12:10pm

EO 13932 on Assessment and Hiring

Maria Ahmad

12:10pm-12:20pm

Upcoming changes to the Add Questionnaire Item process

Stephanie Colon

12:20pm-12:30pm

Open Questions



Testing... 1,2,1,2- Testing
How many jellybeans do you think are in this jar?



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Considerations around setting Minimum Passing Scores for AQs

Margaret Barton



Upcoming AQ Passing Score Functionality

- HR users will be able to set a *passing score* based on **minimum required proficiency** for Assessment Questionnaires
- The passing score will be based on the raw score and can be set at different values for different rating combinations (e.g., GS-12 v. GS-13)
- Applicants who do not meet the passing score (regardless of veterans preference) will be rated ineligible for consideration
- The ability to set/apply a passing score will be permissioned, and defaulted to disabled for all users except Office Administrators
- The passing score will be locked down once the announcement is released and opened



Why Use an AQ Passing Score

- Applying an AQ passing score helps to ensure that applicants who are referred to hiring managers have the required level of proficiency in key competencies to be successful in the position
- An AQ passing score can be used with or without USA Hire or another assessment

Combining an AQ with USA Hire

- When using USA Hire Standard, the AQ should focus on technical competencies
- When using USA Hire Premium, AQ should focus on competencies specific to the occupation



Establishing an AQ Passing Score

1. Determine if a passing score may be useful for a particular series/grade based on a strategic discussion and decision
2. Establish rigorous methodology in consultation with personnel psychologists/assessment experts and legal counsel
3. Identify data available that could inform the passing score setting process
4. Identify subject matter experts to participate in the passing score setting process
5. Carry out passing score setting process with a trained facilitator
6. Document the process
7. Evaluate the results associated with using a passing score



Considerations

- Qualifications of subject matter experts and assessment experts
- Deliberate judgments with accompanying and defensible rationale required
- Concept of borderline performance
- Errors of (pass/fail) classification
- Aligning passing scores across grades and openings (for same position or series/grade)
- Compensatory scoring
- Legal context/implications
- Applicant questions/concerns



Next Steps

- Identify particular positions (series/grade) for which an AQ passing score may be useful
- Consult with your assessment experts and legal counsel to determine appropriateness and methodology
- Coordinate with your USA Staffing Account Manager as functionality becomes available





DISCUSSION

Do you think your agency would be interested in using the AQ passing score functionality?

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Do you think that your agency would be interested in using the AQ passing score functionality?

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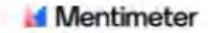
DISCUSSION

If yes, how do you envision your agency wanting to use this functionality?

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If yes, how do you envision your agency wanting to use this functionality?



N/A

Position based

Best for scientific or specialty positions where selective factors can't be used.

high vol. recruitments

Certain positions within the agency

high volume

Examiner positions for cohort hiring

High Volume Recruitment

hire best of the best

For higher level positions. Technical positions. Education requirement positions.

Mission-critical occupations

N/A

Definitely "high volume" vacancies.

High-volume positions

To screen out applicants who are very clearly unqualified for frequently-filled positions, but this is still dependent on the applicant answering truthfully about their lack of qualifications.

N/A

limited

possibly large recruitments, high volume



I think they would want to use it across the board, however Training the user on the methodology would be a high cost.

To assist in narrowing down BQ for specialized positions

To better assess quality applicants.

There are certain positions that this would be useful

high volume

Training

High volume

343/301 positions or high volume announcements

High volume positions

To help get better candidates for technical occupations

TRAINING TRAINING TRAINING

Very Interesting!!

Technical, mission critical occupations

for critical positions

higher grade levels, Intelligence title 50 ones for sure

not sure

Not sure just yet.



DISCUSSION

If no, what challenges or barriers would you need to overcome?

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If no, what challenges or barriers would you need to overcome?



50





DISCUSSION

What assistance (if any) would you need from OPM to overcome these challenges?

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What assistance (if any) would you need from OPM to overcome these challenges?



Stats

Training

Training

I/O Psychology support

training

Refresher training.

Looser restrictions on validation rigor

Pilot with metrics by occupational series

Training

Outline of functionality and validation to share with management

Training

training

Training to promote the features

Steps to take to get the questions through the approval process.

Training

agency specific training

training, IO psychologist expertise, best practices

Training



A personnel psychologist to validate

Support without additional cost

Examples

Clear guidance on the steps involved, documentation required, and level of SME involvement required to set a passing score. Examples of do's/don'ts.

full demo from beginning to end and training

how about training

Assessment policy expertise

Analysis Training (from I/O Psych)

One on one partnership/training session to work on establishing assessments

Personnel psychologists

clear and effective guidance. That has no grey area. Ownership and enforcement of the policy to promote uniformity across the federal government

Policy the governs across the Federal Government. NO allowing individual agency to create additional policy

not sure

A large yellow L-shaped graphic is positioned on the left side of the slide, framing the main title. It consists of a vertical bar on the left and a horizontal bar at the top, meeting at a right angle.

EO 13932 Modernizing and Reforming the Assessment and Hiring of Federal Job Candidates

Maria Ahmad



Executive Order 13932

Modernizing and Reforming the Assessment and Hiring of Federal Job Candidates

Sec. 2. *Revision of Job Classification and Qualification Standards.*

- (a) The Director of OPM, in consultation with the Director of the Office of Management and Budget, the Assistant to the President for Domestic Policy, and the heads of agencies, shall review and revise all job classification and qualification standards for positions within the competitive service, as necessary and consistent with subsections (a)(i) and (a)(ii) of this section. All changes to job classification and qualification standards shall be made available to the public within 120 days of the date of this order and go into effect within 180 days of the date of this order.
- (i) An agency may prescribe a minimum educational requirement for employment in the Federal competitive service only when a minimum educational qualification is legally required to perform the duties of the position in the State or locality where those duties are to be performed.
 - (ii) Unless an agency is determining a candidate's satisfaction of a legally required minimum educational requirement, an agency may consider education in determining a candidate's satisfaction of some other minimum qualification only if the candidate's education directly reflects the competencies necessary to satisfy that qualification and perform the duties of the position.
- (b) Position descriptions and job postings published by agencies for positions within the competitive service should be based on the specific skills and competencies required to perform those jobs.



Executive Order 13932

Modernizing and Reforming the Assessment and Hiring of Federal Job Candidates

Sec. 3. *Improving the Use of Assessments in the Federal Hiring Process.*

- (a) In addition to the other requirements of this order, the Director of OPM shall work with the heads of all agencies to ensure that, within 180 days of the date of this order, for positions within the competitive service, agencies assess candidates in a manner that does not rely solely on educational attainment to determine the extent to which candidates possess relevant knowledge, skills, competencies, and abilities. The heads of all agencies shall develop or identify such assessment practices.
- (b) In assessing candidates, agencies shall not rely solely on candidates' self-evaluations of their stated abilities. Applicants must clear other assessment hurdles in order to be certified for consideration.**
- (c) Agencies shall continually evaluate the effectiveness of different assessment strategies to promote and protect the quality and integrity of their hiring processes.



OPM Memos on EO 13932

- July 31, 2020 - [Implementation of E.O. 13932; Determining Qualifications and the Use of Assessment Tools When Filling Positions](#)
 - Included request for a designated lead and alternate point of contact at the headquarters level of each agency who will coordinate with OPM on their agency's implementation of the EO.
- September 25, 2020 - [Draft General Schedule Qualifications Policy - E.O. 13932; Modernizing and Reforming the Assessment and Hiring of Federal Job Candidates](#)
 - Includes request for comments: one consolidated agency submission at the headquarters level by October 16, 2020 with your agency comments to the qualification standards.



Assessment Strategy Sessions

Conducted during USA Hire Working Group Meetings 11/2019 – 09/2020

- Part 1: **Questions and Considerations** when developing your assessment strategy
 - Focused on four areas: context, stakeholders, content, and process
- Part 2: **Types of Assessments** that are commonly used as part of an assessment strategy
 - Discussed 9 types of assessments, with a focus on AQs and USA Hire standard assessments
- Part 3: **Whole Person Approach** and why this is important to your assessment strategy
 - Focused on whole person job analysis and using a *palette of assessments* to complete enough of the puzzle to make a sound and effective decision
- Part 4: **Assessment Approaches for Common Hiring Scenarios**
 - Provided examples of types of assessments that can be used in different hiring situations



The slides and recordings for all 4 parts are available on the [USA Hire Resource Center](#)



Additional OPM Resources

- [Assessment and Selection](#) page on OPM website
- [Assessment Decision Guide](#)
- USA Staffing Training: [Best Practices for Assessment Questionnaire Development](#)
- [USA Hire](#) page on OPM website
- Hiring Excellence – [Mythbusters](#)
- OPM Memo: [Improving Federal Hiring through the Use of Effective Assessment Strategies to Advance Mission Outcomes](#)



How does USA Hire meet the EO requirements?

1. USA Hire measures general competencies directly related to the position.
2. USA Hire does not rely on an applicant's self-evaluation.
3. USA Hire uses professionally developed, reliable, and valid assessments that can be used governmentwide and off-the-shelf.
4. USA Hire offers assessments for:
 - a) Occupational specific non-supervisory positions
 - b) Supervisory and Management positions
 - c) Executive positions
 - d) Writing ability
 - e) Program/project management
 - f) Custom assessments tailored for unique agency needs



USA HireSM
Transforming Government One Hire At A Time



Other Assessment Options

- Resume Review
- Accomplishment Records
- Structured Interview
- Writing Assessment
- Work Sample/Simulation
- SME Process (e.g., SME-QA)





DISCUSSION

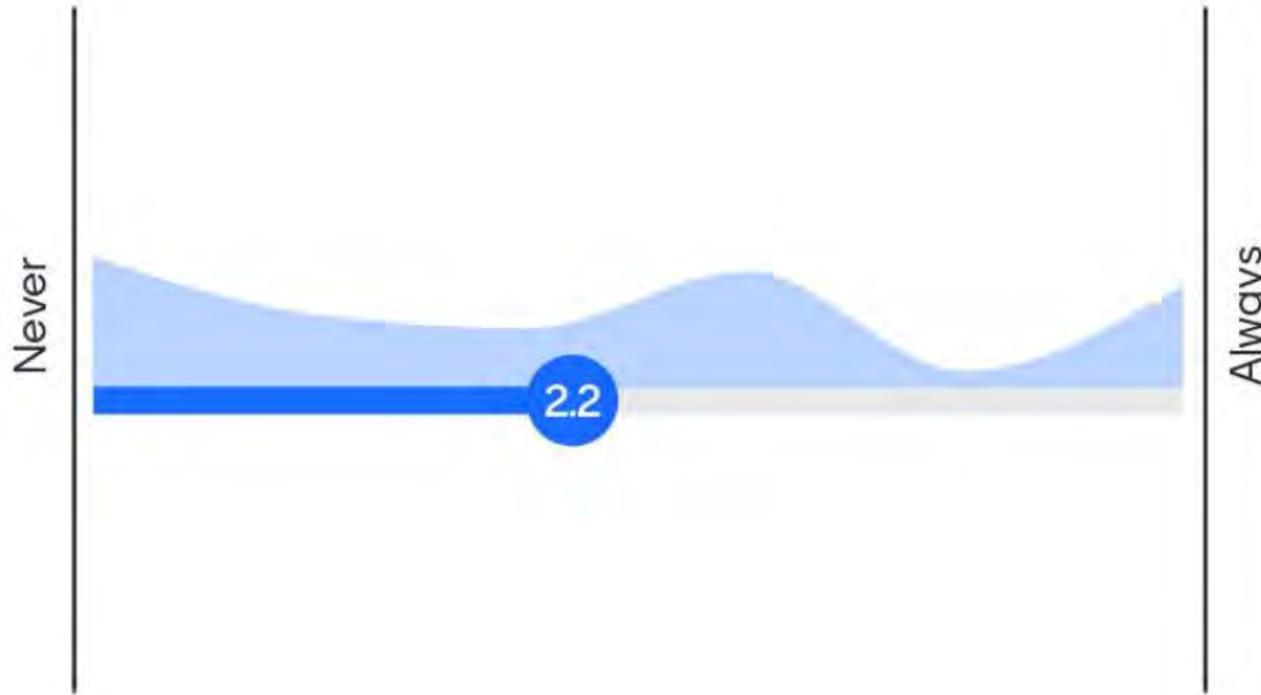
Does your agency currently use other assessments besides an *AQ prior to certification?*

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Does your agency currently use other assessments besides an AQ prior to certification?

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Manual Assessments

- Manual Assessment is a **placeholder** for an assessment conducted outside the USA Staffing system.
- For example, can be used to capture SME review process, structured interviews, accomplishment records, panel ratings, or composite scores for multiple assessments.
- Can be used in combination with an Assessment Questionnaire (AQ) and/or USA Hire assessments.
- Can be added to either a vacancy's Assessment Package or as part of an Assessment Package Template.
- Manual assessments allow HR users to **export an applicant list** and **import applicant scores** from an Excel file.
- The ability for an HR user to create manual assessments is permissioned.



Manual Assessment Scoring Options

- **Min Raw Score** – Minimum number of points an applicant can receive on the assessment
- **Max Raw Score** – Maximum number of points an applicant can potentially receive on the assessment
- **Standardize scores:**
 - **Disabled** (default): Scores are simply transmuted to 70-100. Recommend using this option if the Manual Assessment is the only one used in calculating the applicant's final score.
 - **Enabled:** Scores are first standardized using vacancy-level mean and standard deviation values before being transmuted. This option is recommended if using a manual assessment in combination with an AQ or USA Hire assessments.
- **Standardize scores using custom values** – Scores are standardized using custom mean and standard deviation values that the HR user enters before being transmuted. *Recommend only using this option in consultation with an assessment professional.*



Panel Reviews

- Panel reviews are useful whenever you need to send a Stored List of applicants to one or more SME/hiring managers
- Panel reviews are typically sent *prior to certification*
- Allows the HM user to view applicant documents and application information
- Panel Review assignments allow the HM user to:
 - **View only:** Review applicant information and enter notes
 - **Edit/Override Scores:** Provide input on applicant qualifications/final score
- HR user can view applicant qualifications/scores entered by the HM user(s) and override applicant ratings as needed



Example Steps to Use Manual Assessment with SME Panel Review

1. Build the Assessment Package to include a Manual Assessment (before JOA release)
2. Create a Stored List of applicants who need to be sent through the SME panel review process
3. Generate an Export (Excel spreadsheet) of applicants from a Saved List which will allow their panel review results to be saved/uploaded into their records
4. Send the applicant Stored List with attached rating guide and Excel spreadsheet to the SMEs using a Panel Review
5. The SME would be able to access the applicant documents (e.g., resume, cover letter, etc.) and use the Excel spreadsheet to input the results/scores for each applicant
6. Once complete, the SME would attach the completed spreadsheet to the Panel Review and return it to HR
7. The HR user would import the Excel spreadsheet from the Saved List, which would update each applicant's final rating using the appropriate weights designated in the Assessment Package



USA Staffing Demo of Manual Assessments

Maria Ahmad



DISCUSSION

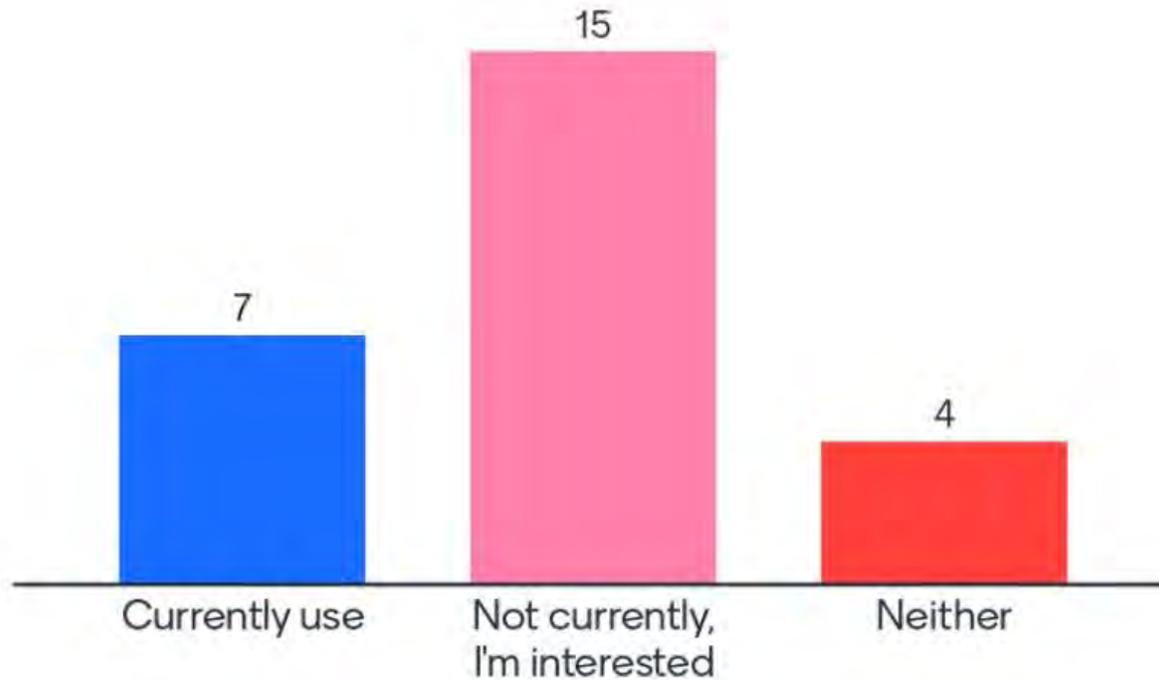
Do currently use, or think your agency would be interested in using manual assessments?

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Do you use, or think your agency would be interested in using manual assessments?

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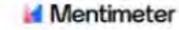
DISCUSSION

If so, how do you use/envision using this functionality?

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If so, how do you use/envision using this functionality?



on occasion	Not sure.	We currently use a Panel process that ranks applicants and uses a "natural break"	I'm not sure.
USA hire for examiners	not sure	SME s	Cohort hiring
not sure	for certain occupations	not sure	To assess technical competencies via panel. To assess writing samples.
already use.	This would be helpful.	undecided	SME panels
maybe	SME review	Not sure	Certain occupations
Not sure	Use min quals questions, combined with panel review	no sure	cost



DISCUSSION

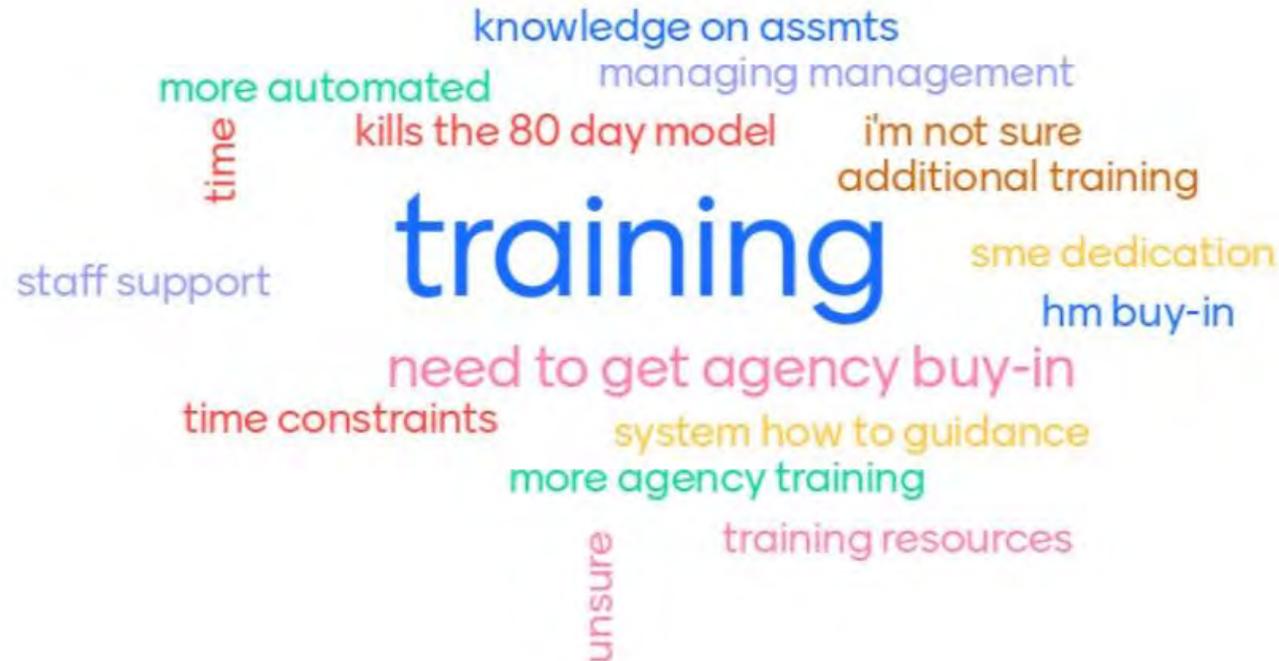
If no, what challenges or barriers would you need to overcome?

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If no, what challenges or barriers would you need to overcome?

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Upcoming Changes to the Add Questionnaire Item Process

Stephanie Colon



Under the current process...

The screenshot shows a web form titled "Add Questionnaire Item". At the top left, there is a "Link To" dropdown menu with "None" selected. To its right is a "Screen-out" checkbox which is unchecked. Further right is a "Required" dropdown menu with "Yes" selected. Below these is the "Item Stem" section, which features a rich text editor toolbar with icons for undo, redo, search, bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, and insert link. A character count "0 of 10000" is visible in the top right corner of the text area. Below the text area are two dropdown menus: "Response Type" with "Multiple Choice - Single Select" selected, and "Scale" with "Item-specific Response Options" selected. At the bottom right of the form are three buttons: "Save & New", "Save & Close", and "Cancel".

Users are asked to input information about the item before entering the item text (Competency Link, Screen out, Required)



Under the current process...

Vacancy 10114381 | Assessment Package | Announcement | Reviews | Assessment: Assessment Workgroup

USAJOBS Announcement Title: Assessment Workgroup | Pay Plan-Series-Grade: GS-0201-11 | Assessment ID: 200133

Assessment Information | Competencies | **Assessment Questionnaire** | Screen-Out Criteria | Rating Criteria | History

- Assessment Questionnaire (3 Items) * = Required Add to Questionnaire

Select All

- 1. Item 1 *

Add Response

- 2. Item 2 *

Response Option

A Response A

B

C Response C

Add Response

- 3. Item 3 *

Add Response

Save Cancel

To add response options, users must first save and close the box they used to create the item. Responses are added and edited on the questionnaire page.



Upcoming Functionality

A screenshot of a web form titled "Add Questionnaire Item". The form has a header bar with the title and a close button. Below the header is a large text input field labeled "Item Text" with a rich text editor toolbar and a character count of "0 of 1000". Below the text field are several sections: a "Screen out Question" toggle (disabled), a "Response Required" toggle (enabled), a "Link to Competency" dropdown menu (set to "None"), and a "Response Type" dropdown menu (set to "Multiple Choice - Single Answer"). Below these are two more dropdown menus: "Item-specific Response Options" (set to "None") and "Item-specific Response Options" (set to "Item-specific Response Options"). At the bottom of the form, there is a message: "You have not added any responses. Click 'Add Response' to get started." and three buttons: "Add Response", "Save & New", and "Save & Close" (with a "Cancel" button next to it).

Using a top-to-bottom approach, the first thing users will enter is the item text. Information about the item is selected after the text has been entered.



Upcoming Functionality

Users will be able to enter their response options in the same pop up module that they are using to create the item.

Response Option	Response Text
<input type="checkbox"/> A	Response A
<input type="checkbox"/> B	Response B
<input type="checkbox"/> C	Response C
<input type="checkbox"/> D	New Response



USA Staffing Demo of the Add Item to Assessment Questionnaire Functionality

Steph Colon



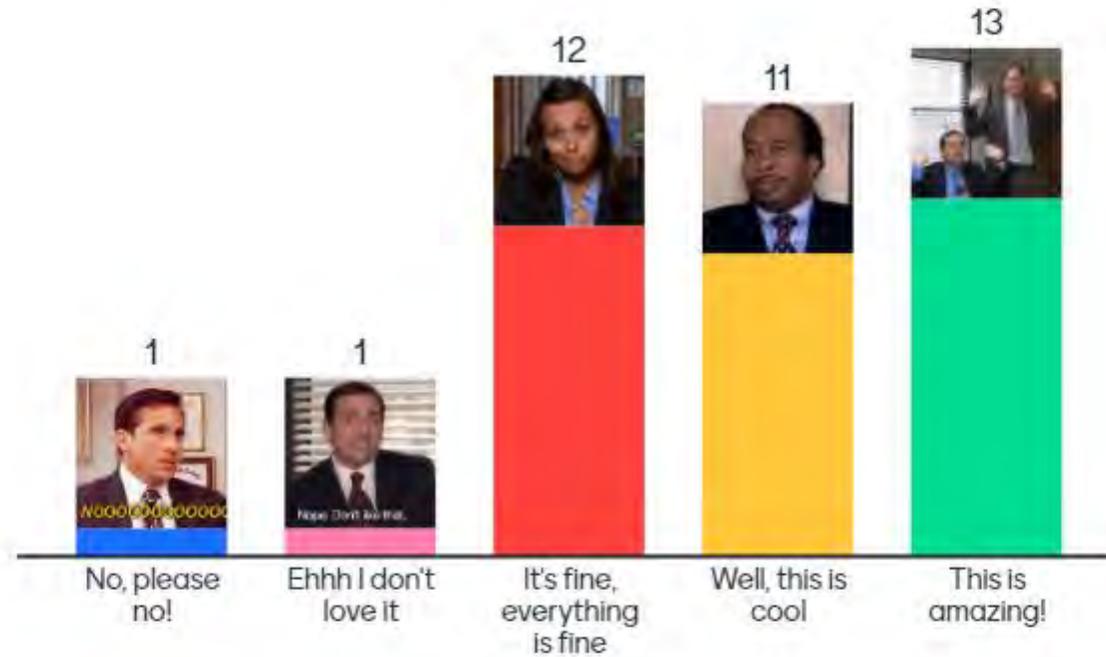
DISCUSSION

How do you feel about these changes to the Add Item functionality?

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How you feel about these changes to the Add Item functionality?





Do you have any feedback you would like to share on these changes?

Not at this time.

not sure

I love how hard you work to make things better for us

The import function is easier

Will this change also incorporate the testing of scenarios?

i really like the export and import feature

Appears more user friendly, and a time saver

This has a better flow and feel to it

The changes will help the user do their job much easier.

Nice to have options!

More definitive changes regarding vet. preference adjudication. Not you guys though.

it is more user friendly

Can you split up each topic today and have a more in depth session on each?

I love how all the options are on one page



What other topics would you like to see discussed in future Assessment Workgroup meetings?

Mentimeter

great presentation
where to find min quals
preview of functionality
how to standardize assmts
min qual- examples 343 se
unsure at this time
create a list of topics
weighting method best
this is great
i like the menti
practice
proper use of screen outs
adding assessments admin



Assessment Updates Stephanie.Colon@opm.gov

Manual Assessments Maria.Ahmad@opm.gov

Questions?