



tips&tools

Making your SMT work better: the =mc Competency Assessment Tool

Over 3 years =mc has tested and developed a tool and workshop to help assess the ability of a SMT to work effectively. The tool identifies the individual and group competencies that contribute to success. The workshop, can help an SMT discover where it needs to improve and how to make that journey.

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Challenge:

All charity or NGO Senior Management Teams (SMTs) face challenges as they lead their organisation. One of these challenges is accurately and honestly assessing their effectiveness as a group. They need to have a systematic process for identifying strengths and weaknesses and developing skills and abilities in weaker areas.

Normally an SMT represents a diverse mixture of experience, expertise and ability with each individual chosen for their functional contribution or role. However, a group of excellent professional individuals doesn't necessarily mean a successful SMT. So tough questions often emerge: What is stopping us from working as a 'corporate' team? How can we move from working well to working excellently? What do we all need to be good at to make this organisation successful? What do we need to do differently to achieve even more? How do we distinguish our role from that of the CEO and board?

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The assessment tool works for:

- 'Corporate' SMTs
- Leadership groups
- Functional SMTs including fundraising, finance, service provision etc.

The =mc SMT Competency Assessment Tool is the only externally validated tool specifically designed for charities and NGOs.

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the Management Centre (=mc) is a management consultancy working internationally to transform the performance of ethical organisations - charities, public bodies, INGOs, and cultural organisations.

Purpose

The tool is designed to help an SMT develop as individuals and as a group. Using the tool will enable you to:

- Raise awareness of current individual and collective competencies
- Identify emerging competencies at an individual and team level
- Establish developmental areas to match organisational needs
- Create an action plan for team and individual development

The =mc model

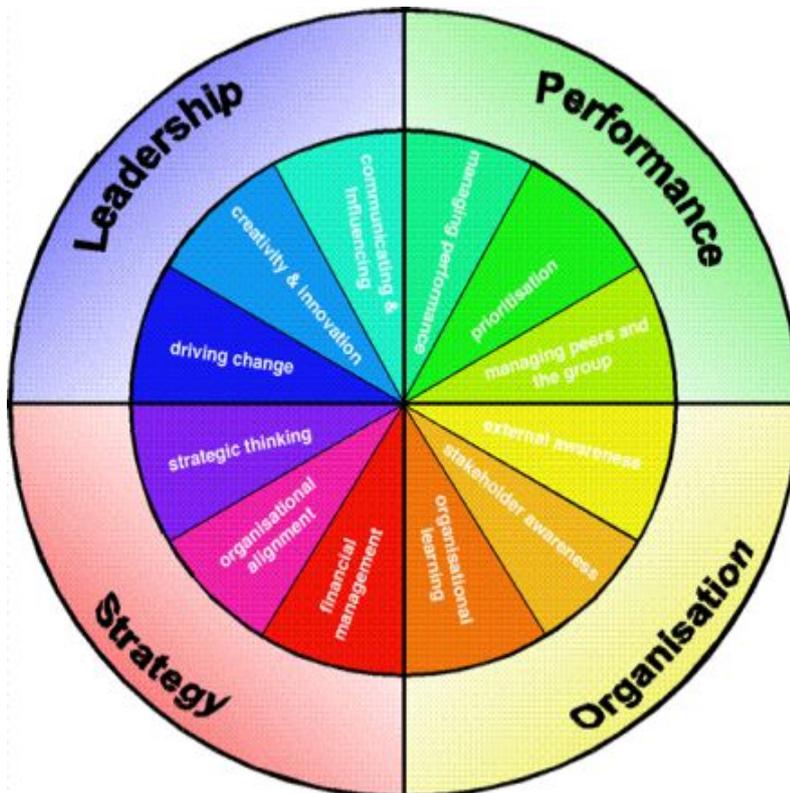
The =mc CAT is based on a three years research programme with not-for-profit, charity and NGO senior teams. The research used interviews and a range of assessment approaches to identify the competencies of highly performing teams. The tool is flexible and accommodates differences in culture and team purpose.

The =mc research programme identified twelve underpinning core SMT competencies – skills, abilities and knowledge. These are illustrated in the competency wheel below.

These 12 competencies have been grouped together under four headings – Strategy, Leadership, Organisation and Performance.

There are 36 sub-competencies, three for each core competency. Each participant and the whole team are assessed against these by themselves and up to three of their peers. You can also add subordinate assessment.

Since every organisation is different, each team is asked to priorities the core competencies critical to their strategic plan.



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Benefits

The =mc CAT has a number of benefits:

- The process is confidential, creating a safe environment for team members to give and receive feedback
- The online questionnaire is quick and simple to complete ensuring high levels of engagement and a robust data set
- The results can be presented as a group score while individual confidential results are available to each participant
- The team can also compare themselves to other similar SMTs from the =mc dataset – or against best in class.
There are datasets for a number of functional areas including fundraising, finance, service etc.

Process summary:

Self and peer assessments are collated through an online questionnaire to create a group profile which highlights the SMT's strengths and their areas for development.

Phase 1: Data Collection and analysis

Participants are asked to take part in a confidential online survey:

- They're asked to indicate what they believe are the most important competencies for success against the current strategic plan
- Team members then 'score' themselves and up to three others
- These confidential results are collated and interpreted by a =mc consultant
- =mc consultants create an overall report on the team's self assessed competency
- =mc generate individual competency profiles
- Individual profiles can be shared with participants and they can be debriefed or coached before or after the workshop
- We can also include our suggestions for improvement and development areas

A typical team report might look like the one below.

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| Team Results | | | 12 Competencies | | | 4 Key Areas | | | |
|--|---------------------|-----------------------|-------------------------------|---------------------|-----------------------|---------------|---------------------|-----------------------|---------------|
| Lake Simcoe Conservation Foundation Board - Team Results | | | | | | | | | |
| 30 Behaviours | Self Score out of 8 | Others Score out of 8 | | Self Score out of 8 | Others Score out of 8 | Need out of 8 | Self Score out of 8 | Others Score out of 8 | Need out of 8 |
| Promoting two-way communication | 7.00 | 6.64 | Communicating and influencing | 6.90 | 6.94 | 7.20 | Leadership | 6.28 | 6.75 |
| Influencing skills | 6.20 | 6.43 | | | | | | | |
| Personal credibility | 7.60 | 7.88 | | | | | | | |
| Challenging accepted practice | 6.40 | 6.23 | Creativity and innovation | 6.90 | 6.98 | 6.60 | | | |
| Encouraging challenge | 6.40 | 6.17 | | | | | | | |
| Championing initiatives | 7.60 | 6.17 | | | | | | | |
| Sponsoring change | 7.00 | 7.17 | Driving change | 6.90 | 6.30 | 6.40 | | | |
| Understanding change | 6.40 | 6.28 | | | | | | | |
| Implementing change | 6.40 | 6.69 | | | | | | | |
| Feedback skills | 6.60 | 6.70 | Managing performance | 6.30 | 6.80 | 6.40 | | | |
| Understanding management information | 6.80 | 7.69 | | | | | | | |
| Monitoring targets and outcomes | 6.60 | 6.60 | | | | | | | |
| Setting priorities | 6.20 | 6.48 | Prioritisation | 6.60 | 6.80 | 6.65 | | | |
| Decision making | 6.80 | 6.69 | | | | | | | |
| Allocating resources | 6.80 | 7.40 | | | | | | | |
| Adaptable style | 6.20 | 6.23 | Managing peers and the group | 6.40 | 6.82 | 6.60 | | | |
| Evaluating impact - self and others | 6.40 | 6.23 | | | | | | | |
| Development planning | 6.80 | 6.28 | | | | | | | |
| League and rules | 7.00 | 7.83 | External awareness | 6.30 | 6.88 | 6.80 | Organisation | 6.78 | 6.88 |
| Competitors and communities | 6.00 | 6.67 | | | | | | | |
| Entrepreneurial thinking | 6.00 | 6.09 | | | | | | | |
| Stakeholder engagement | 6.00 | 6.83 | Stakeholder awareness | 6.25 | 6.96 | 7.20 | | | |
| Beneficiary/user focus | 6.00 | 6.31 | | | | | | | |
| Appropriate governance | 6.86 | 7.67 | | | | | | | |
| Participative inquiry | 6.80 | 6.17 | Organisational learning | 6.75 | 6.80 | 6.40 | | | |
| Learning opportunities | 7.00 | 6.48 | | | | | | | |
| Specialist contribution | 6.80 | 7.29 | | | | | | | |
| Strategic analysis | 7.20 | 7.67 | Strategic thinking | 7.00 | 7.28 | 7.40 | Strategy | 7.01 | 7.00 |
| Developing vision and mission | 7.00 | 7.14 | | | | | | | |
| Balancing strategic needs | 7.00 | 7.17 | | | | | | | |
| Developing culture | 6.00 | 6.71 | Organisational alignment | 6.25 | 6.40 | 6.80 | | | |
| Creating external networks | 6.80 | 6.85 | | | | | | | |
| Quality focus | 6.80 | 6.71 | | | | | | | |
| Financial awareness | 7.00 | 7.88 | Financial management | 6.75 | 7.83 | 6.80 | | | |
| Budgeting skills | 6.86 | 7.18 | | | | | | | |
| Risk management | 6.40 | 7.68 | | | | | | | |

Phase 2: Developmental Workshop

- In the accompanying report =mc will present the model and the collective profiles. This includes perceived competency strengths and developmental areas
- At the workshop session a key task is for each group to agree collectively the most important competencies for success
- The group then reflects on the results and decides which areas they want to focus on and how they would do this, creating a development agenda
- The creation of a development agenda by the group represents a planned and actionable commitment to improving group performance. This is recorded
- If not already shared the individual profiles are given to participants and they are offered coaching from a skilled =mc coach to develop personal performance
- Participants can be given ideas on how to improve team and individual performance in a practical ways that relate to different developmental needs
- =mc can provide additional coaching individually or as a group over a longer period of time – in person, online, or by telephone

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Customers

The =mc CAT has been used by a number of UK and international organisations including larger charities such as Amnesty International, MSF, Alzheimer's Society, National Trust for Scotland, and Muscular Dystrophy, to the smaller Lake Simcoe Foundation.

Confidentiality

Development processes raise sensitive issues and share personal information. All advised aspects of this process are considered strictly confidential unless agreed by participants. The information and results acquired by =mc, will not be disclosed to anyone other than those directly involved in the process, as agreed with the customer.

What's next?

To find out more about the =mc Senior Management Competency Assessment tool please contact Bernard Ross, Director on +44 (0)20 7978 1516.

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