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**SCIENTIFIC EXAMINATION AND VALUATION  
OF HOLISTIC MANAGERIAL COMPETENCE**

**NAUKOWE METODY BADANIA I OCENY  
HOLISTYCZNYCH KOMPETENCJI MENEDŻERÓW**

**Abstract:** The aim of the article is to define the competence of the employees - managers and employees, the need and methods of its evaluation. Meeting the set goals requires a scientific approach to meeting the goal set. Employees' holistic competence consists of them, professional knowledge, practical skills and personality traits. Defining the necessary knowledge, application skills and human personality traits is a fundamental contribution of a scientific article. Another scientific benefit is emphasis the need to know the necessary knowledge, skills and human qualities to achieve the holistic competence of the workers. The specific scientific contribution of the article is the definition, justification and explanation of the use of valuation methods in management practice.

**Keywords:** scientific examination, terms of holistic management, valuation of competences, assessment methods

**Streszczenie:** Celem artykułu jest całościowe określenie kompetencji pracowniczych menedżerów i pracowników oraz wskazanie potrzeby i metody ich oceny. Spełnienie wyznaczonych celów wymaga naukowego podejścia do osiągnięcia wyznaczonego celu. Ogólnie rzecz ujmując, na kompetencje pracowników składa się ich wiedza zawodowa, umiejętności praktyczne i cechy osobowości. Zdefiniowanie zasadniczych problemów, wskazanie możliwości aplikacyjnych i określenie roli cech osobowości człowieka stanowi fundament naukowy artykułu. Aspekt naukowy artykułu wyraża się przede wszystkim wskazaniem znaczenia wiedzy pracowników, ich umiejętności i cech osobowościowych dla kompetencji pracowniczych w ujęciu holistycznym. Szczególny wkład naukowy artykułu polega na określeniu, uzasadnieniu i wyjaśnieniu zastosowania metod oceny pracownika na potrzeby praktyki zarządzania.

**Słowa kluczowe:** naukowe metody badawcze, warunki holistycznego zarządzania, ocenianie kompetencji, metody wartościowania

## Introduction

This article justifies the necessity of the need for workers' full competence. to carry out their duties of competence and skills at work. The purpose is also to define what constitutes holistic competence, needs, reasons and methods of evaluation / measurement / level of workers' holistic competence. The scientific approach to defining the managerial competence of workers is based on three pillars: professional knowledge, practical skills and personality traits. Those parts of competence must be acquired through learning - learning. training and upbringing. An overview of learning methods is another contribution of the article.

Nowadays, we find it perfectly normal that we measure the material property (i.e. the material assets) of organisations in quantitative measures (i.e. using indices, and concrete measurable values). We do this or value it in order to find out how these assets are being managed or accumulated or if they have remained unchanged or even reduced. In the past, mainly the material assets (i.e. capital – e.g. buildings, machines, tools, money, energy, raw materials, material and physical work) used to be the source of movement.

### 1. Scientific examination of holistic managerial competence

**Science is a system of knowledge regarding the objects surrounding us in nature (on the Earth) and in the Universe.** The formation of the system of knowledge about objects and also, in its own way, the development of science is very useful and

is also an exciting human activity. It is not enough to simply perceive objects surrounding us, but necessary to investigate them in a comprehensive way – to classify (i.e. to distinguish, sort) them, to understand them and their interactions and to use this knowledge for mankind's benefit.

Science is developing in the worldwide context. Nowadays, it is not important where the new knowledge makers or defenders of certain opinion work, what is more important is what knowledge do they formulate and how they prove its veracity (correctness).

Such knowledge and arguments are considered to be scientific in that they generally have a permanent validity and can be used in practice. It is essential that both formulated knowledge and its underpinning argumentation be permanently valid, verified and confirmed. However, this is usually not particularly difficult and need not take a long time.

There have been a number of approaches and methods in respect to the creation of knowledge about objects in the history of science. Bitter disputes have erupted many times in the past regarding just which perception of objects was more realistic: i.e. sensual perception versus rational perception. Plato held that the objects we perceive with our mind are much more realistic than the ones perceived with our senses.

Several scientists – especially from the social sciences area, assume that science is in crisis. They predicate that science has not clarified its principles, the origins of axioms (it arises from, but does not prove them); and also, since science as a cultural (civilisation) and culture-constituting phenomenon has lost its original uniformity in the ever-increasing diversity in specialisations, it has therefore also lost the possibility of a unifying interpretation. The reason being that science as a whole has forgotten about its original sense. For instance, two specialist disciplines, economics and ecology – although speaking about the same thing, seldom concur.

Human society uses the individual's partial knowledge immediately, hoping to improve its existence and ability to survive. Opposite to the individual and the sporadic use of partial knowledge, there is a dam holding unknown areas of nature and society. This is where the negative effects of the use of knowledge originate from and mankind feels the pressure of progress consisting of the fact that the more partial knowledge society uses, the more significantly it disturbs the ecology of its existence. The future development of mankind would appear to be quite depressing if we presume the negative use of the results of science in certain quarters of society – with respect to politicians and warfare.

Complexes, being the objects of cognition, are very complicated. Many objects that need to be known and managed as a complex have, at the same time, the character of inanimate objects (this aspect is investigated by the technical sciences), animated objects (investigated by the natural sciences) and social objects (investigated by the social sciences). According to the specifics of the objects' investigation, the technical, natural and

social sciences are oriented on partial events that cause the creation of individual partial sciences; however, it requires the interconnection of individual partial sciences in order to encompass several aspects of the whole object. The hybrid science - called physical chemistry, originates from the interlinkage of two sciences - physics and chemistry; while the interlinkage of chemistry and biology creates biochemistry, etc.

## 2. The subject of holistic management

The linkage of two and more partial sciences creates an interdisciplinary science – cybernetics, for instance; **multidisciplinary science** originates from the linkage of many partial sciences. **Management is such a science.** The opinions of scientists on science are complex and are not unified. Therefore, science itself becomes an object of investigation. Scientists are trying to formulate a science (scientific basis) about science - a system, scheme or model of science. This process is in continuous development.

**Holism is a unique unit feature which is not characteristic for any element or part of a unit, but is something new, emergent (being born), being created from the mutual interaction of elements (parts).** Managerial competence is a holistic (emerging) quality. The competent manager is not - and can't be, a manager who is only professionally skilled, or a worker with enormous knowledge, but who is practically unable to apply it - and if so, then only in their own favour because egoism prevails among their personal qualities.

**A manager's competence – their holistic, emergent feature is a characteristic given by their professional ability, social maturity and practical skills.** On the one hand, the human being is the most perfect creature in nature; on the other hand, they must continuously learn to be competent in relation to nature and to other people. **Competence is a holistic quality of a manager such when humanity prevails over egoism, and knowledge over the ignorance to realise things in practice.**

Systemic thinking is a discipline that teaches us to see structures, the relationships between competence elements and between maturity, knowledge, and skills which are not obvious all the time – but which are a basis for the understanding of competence as the holistic manifestation of a personality. **If we succeed in perceiving competence as a whole, holism or emergent, we are able to “care for its health”; we can denominate, and identify where to increase the level of our knowledge, skills or maturity by means of education – i.e. upbringing, study.**

In general management theory, the term “competence” is less traditional; it is a relatively new term<sup>1</sup>. As we have already mentioned, the term “competencies” -

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<sup>1</sup> The difference between the word and term consists in the expression of unique and general properties. If the word is used to denominate the unique and individual subject, activity, function, etc., it remains a word. Any word becomes a term if it is used to denominate the higher quantity of similar subjects, activities, or functions as if they were equal.

by which we understand the obligations, authorities, responsibilities of workers (i.e. employees, managers) to carry out certain jobs, tasks is better known. Just because competence – i.e. the capability to perform in a certain position is a new term – and many positions, not only work-related ones, are performed incompetently by people without the capability to perform them, we will pay greater attention to the definition of competence.

**In the formation of knowledge, and the development of theory, management science accentuated - and in the majority of cases, still accentuates the professional (knowledge) and skills (i.e. practical, application) requirements of the management subject.** The sustainable development, efficiency, quality and products of the work of any organisation depend ever more and more on the socialisation of an individual – without regard to whether they are an employee, a team leader or a leader of an organisation or body. **By the socialisation of man, we understand this to mean the level of their personal qualities, social maturity – i.e. the level or degree on which their social competence is based.**

**Part of the object of management is also to create a knowledge-base about the roots, origin, development, present and future of management, and the preparation of people for managerial competence, as well as the assessment of the managerial capability of management subjects.**

### 3. Measuring, valuing or assessing managerial competences level

Nowadays, in organizations which focus on the use of information technologies in field of new ideas creation, their acquiring in trainings as practical skills, but also an enhanced focus on social abilities of a person, the situation is changing rapidly. In findings-oriented organisations their development and the accumulation of their assets is beginning to depend on the intangible assets. The renowned Swedish specialist Karl Erik Sveiky, denominates intangible assets as knowledge assets and he differentiates three types of these assets:

- **Internal knowledge assets**, (e.g. the appropriate orderliness of the organisation, orgware, software, patents),
- **External knowledge assets**, (e.g. goodwill, image, logos and brands, the level of relationships with customers, public relations),
- **Competence**, (i.e. the capability) of employees.

The opinion has emerged that the measurement of “intangible things” is not possible. However, this affirmation doesn’t hold up. Measuring people’s capability is much more difficult and complicated and therefore – also in accordance with international valuation standards - the more apposite denomination **capability valuation**, i.e. the valuation of knowledge assets is beginning to replace the terms measuring and assessment more and more.

The valuation of how one or another manager contributes to the success or failure of a company is still very difficult. The problem is that company efficiency is ever more complex and requires management subjects to cooperate above and beyond the borders of their ordinary activities. Team-work, motivation, communication – these are the most important skills, but, unfortunately, their valuation is still **subjective** so far ... despite of all deficiencies of beauty, it is still more desirable<sup>2</sup>.

It seems that practically nobody has any doubts about the need to value the capability of management subjects despite the lack of adequate methods and approaches. This is more so since specialists are engaged in a professional dialogue about what management capability is formed by, and what needs to be valued.

When it comes to valuation, we can distinguish the following areas which need it:

- In the selection of people for employment in organisations,
- In career promotion – mainly to manager positions,
- In qualification growth – increases in capability levels,
- In determining order and comparability – e.g. in rewarding or firing employees, etc.

The assessment of employees in the case of the need to fill certain working positions – especially if the applicants are from outside the organisation is currently becoming an ever more lucrative entrepreneurial activity. Many organisations no longer rely on their own HR departments, but they hire so-called assessment centres to do this work. These centres are often ready to bear the risk in the case when a worker is not able to competently fill the position they were selected for.

#### **4. The competences valuation structure**

Approaches and methods for the valuation of management subjects' capability is nothing new today. However, the problem is to define the corresponding and mainly, the generally usable structure of capabilities it is necessary or desirable to assess. Although it is not possible to expect that such a generally valid structure of managerial capabilities will be elaborated and jointly used in the future, this doesn't mean that it wouldn't be necessary to try to classify them in a logical way and to order them into logically justifiable parts within holistic competence.

Our approach to the definition of the structure of managerial capabilities is based on three pillars, and within each of them, we distinguish four capabilities. Of course, these internal division can be much deeper depending on the objective we are tracking by the assessment. The structure of our capability model is formed by other parts (pillars) and their elements mentioned below:

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<sup>2</sup> „Moderní řízení“ 4/2005, p. 75.

A. Personality capabilities which predicting whether the manager knows why and for whom they work, and for whom they do what they do. The personality capabilities evidence the level of maturity of management subjects. The social maturity elements are:

1. Capabilities connected with somatic (efficiency),
2. Capabilities connected with cognition and creativity,
3. Capabilities connected with temperament and emotional competences,
4. Capabilities connected with character and will.

B. Professional (knowledge) capabilities show if a manager knows what to do. The professional skills demonstrate the professional efficiency of management subjects and are designated as their functional capability. The elements of professional efficiency are:

1. Capabilities of systematic and holistic thinking,
2. Capabilities connected with knowledge about management objects,
3. Capabilities connected with use of control functions,
4. Capabilities connected with use of information in management.

C. Application (practical) capabilities show whether the manager knows how to do what needs to be done. The application capabilities demonstrate the level of practical skills of management subjects. The elements of application skills are:

1. Capabilities to motivate,
2. Capabilities to communicate,
3. Capabilities to work in a team and to lead a team,
4. Capabilities of personal management (self and time management).

## **5. Approaches to capability valuation and their levels**

On the basis of current knowledge levels, the approaches to capability valuation can be divided into:

1. Self-assessment,
2. Assessment by one's families,
3. Assessment by superiors,
4. Assessment by experts.

**Self-assessment** has the premise of being the most extensive approach of knowing one's own eligibility for all four types of valuation needs, distinguished in the introduction in Part 17.2.

The human, if they have developed and tested self-assessment methods, for instance in the form of the team profile self-assessment questionnaire according to Belbin (see Part 17.5) at their disposal has no constraints; on the contrary, they are



motivated to know what position in the team distinguished in this questionnaire they have the most developed potential for. On the basis of our experience, when using the self-assessment approach for comparison with their collaborators - for instance in granting rewards, up to 4/5 of the workers consistently assess themselves higher than their superiors do.

**Assessment by families** (i.e. collaborators and close relatives) often has high predicative level. If the people defend against assessment mainly by their collaborators, it bears evidence of the fact that the collaborators are not a team that would have common objectives and common interest in fulfilling them.

**Assessment by superiors** is currently the most widely used system. Its level depends on the superior's competence and methods used. If this competence is low, they can harm the assessed worker. Therefore, management workers should acquire the relevant valuation methods - especially in cases where they evaluate a worker with a view to career promotion. It is desirable to remind the reader of this fact from the academic environment where the members of faculties or university academic senates can suggest and then also elect the candidates for the career control position of dean or chancellor.

**Assessment by experts** can be considered as expert assessment. The experts, if they have certified education and practical skills, often use all known assessment methods and are a guarantee of a realistic evaluation of a person's capability level to meet the needs of the required capability assessment. The preparation (education and training) of experts to assess managerial competences is beginning to develop further.

The known assessment methods are designed to express the level of a person's competence to work in a certain managerial position in different ways. We'll mention some of them here.

We consider the **two-stage capability level** to be the basis:

- competent – incompetent

In questionnaire assessments, the answers to questions or affirmations are: yes, no.

**The three-stage level** distinguishes the following capabilities:

- basic – higher – developed

In questionnaire assessments, the answers to questions or affirmations are: yes, sometimes, no or right, disputable, wrong.

**The four-stage level:**

- basic – low – average – higher

**The five-stage level:**

- basic – low – average – higher – developed

In questionnaire assessments, we use points-rating, for instance:

Basic 1 point – Low 2 points – Small 3 points – Average 4 points – Higher 5 points – High 6 points – Developed 7 points.



## 6. Competences assessment methods

The methods used to assess a person's capability to hold a certain working or managerial position can be distinguished from several points-of-view. In our case, we shall use that of the degree of scholarship, where we distinguish between:

1. Intuitive methods.
2. Heuristic methods.
3. Experimental methods.

Intuitive methods are based to a greater extent on experiences and intuition and in practice they are:

- The First Impression Method.
- The Observation Method.
- The Discussion (i.e. Interview) Method.
- The 360° Valuation Method.

Heuristic methods are based on logical thinking, as well as on experiences. In practice, they are:

- The Questionnaire Method,
- The Points Awarding Method.

Experimental methods rely on:

- Standard tests,
- Software assessment/

Some other management capability assessment or valuation methods are quoted in specialist literature<sup>3</sup> too: e.g. behavioural methods, analogue methods, analytical methods.

In conclusion, we will introduce here a brief description of selected managerial capabilities assessment methods. However, many more are known in practice. We have several of them at our disposal and use them in our pedagogical, scientific, advisory and consulting practice.

**Interviews as a valuation method** is one of the most frequently used methods for the evaluation of capability levels. It is also known in the professional literature as Competence Based Interviews (CBI).

Although ever more authors have begun to impeach the use of discussions just for this purpose, it is still the most frequently used method in our countries. The most frequent reservations against the use of interviews is its lack of accuracy in identifying competence.

Several rules must be kept to during interviews. The first is to evoke the right atmosphere. The correct reactions of the person being evaluated facilitate the whole process and create the conditions for good-quality answers. It is necessary to keep strictly to the right behaviour. What concretely has the assessed manager done, and what led to the necessary result?

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<sup>3</sup> M. Kubiš, D. Spillerová, R. Kurmický, *Manažérske kompetencie: spôsobilosti vyjimečných manažéru*, Praha, Grada 2004.

The discussion must be concentrated on substantive, concrete steps predicating capability and returned in time to facts at issue. During the interview, the assessed manager's task is to identify a couple of projects or tasks they were responsible for or played a key role in.

They also must identify the result this project terminated with. This means that they speak about past, finished events. However, in describing them they will disclose the behaviour they used. We say that they provide behavioural evidence of their doings, what led them to do things and mainly, what the result was. The assessor draws conclusions from this discussion about the level of capabilities they want to monitor.

The selection of the topic, event or project is the key to the interview. By its nature, it should contain the required behaviour characterising the capability evaluation. For instance, when we want to discover a manager's capability to set priorities, divide tasks into smaller units, to delegate them, or to draft a time-schedule and monitor the flow of work on a project, we need to invite them to identify a past situation when something similar was required of them.

When we want to identify for instance, how they manage conflicts between team members, or how perceptive they are to their feelings and how they can unify competing parties and lead them to resolve disputable standpoints in a constructive way, we must evoke in the interview a similar situation. In the interview, we must speak with the manager about several projects. The extent of the discussion is conditioned by the number of capabilities we want to monitor and of course, by the fact whether the manager has ever been in such situation or not.

Similar to every other managerial capability assessment method, the interview is more suitable for certain capability groups and less suitable for others. It is very good for assessing the so-called performance capabilities (i.e. proactivity, goal-orientation, and also some cognition capabilities, like searching for information, analytical thinking, conceptualisation, etc.). However, it is less able to discover conceptual flexibility and of course, the whole range of personality capabilities.

The interview is particularly demanding on the interviewer. As with every discussion, it poses burdens on active listening skills and the ability to ask questions. Careful preparation is important prior to the interview itself: what capabilities do we want to assess, how will we evoke the desired situations, what types of projects will we deal with, etc.

If the manager has a tendency to speak impersonally, it will be necessary to ask them to concentrate mainly on what they did themselves, what were their concrete tasks. In the effort to describe the situation in the most exact manner possible, the manager often floods the expert with a whole range of unimportant details and explanations. This wastes the limited time and, capabilities remain undiscovered. In such a situation, it is necessary to redirect the interviewee back to the merits of the case – i.e. to the capabilities we want to assess.

**Valuation by the 360° Feedback Method** includes the acquisition of information about a manager's qualities from various sources. It is a process that enables one to view their capability through the people who collaborate with them the most: i.e. their direct superior, colleagues, subordinates and, if possible, external and internal customers. This common view on their key capabilities enables the assessed worker to clearly understand their own strengths and needs for development.

The biggest advantage of this approach is the high motivation of the people being assessed to realise changes in their performance or behaviour. Employees accept evaluation by their collaborators as fairer, clearer, and more objective as compared to assessment only by their superior. The high acceptance rate of the output from colleagues contributes to the more rapid change in employees, as well as to more rapid increases in the efficiency of the whole organisation.

At the same time, the employees or customers that have a say on the work of their colleagues feel greater responsibility for what is happening in the company. Evaluation by the 360° feedback method enables them to influence what is happening in, and the culture of, the company.

The outputs from 360° valuation are both quantitative and qualitative. The quantitative outputs provide information about the levels achieved for individual capabilities, as well as about all manifestations of behaviour representing capabilities, the outputs of every expert and averages for the group of assessors. The qualitative outputs are the transcriptions of verbal testimonies of experts to open issues.

**The Thomas International Software Method** of evaluation is based on the 80-year experience of British experts. In the last decade of the last millennium, this was converted into a software form. It is based on the self-assessment of the most precise and the least precise quality in each of 24 rows, whereby every row contains 4 qualities. For instance, the self-assessor has a row with these 4 qualities: Careful; Determined; Persuasive; Kind-hearted. Their task is to mark with a circle ○ the quality that characterises them the least and by a cross × the one that characterises them the most. After having marked all 24 rows, the marked data are transferred to a computer with the Thomas International software and we will have for instance, not only the analysis of their personal profile but also the evaluation of their managerial capability and several other valuations.

## Conclusion

The evaluation of a manager, but also of the working and personal capabilities of people should not be without purpose. It is so when it doesn't influence an increase in capability levels by new, repeatedly-performed activities and if the results of previous evaluations can't be verified.

Such principles, approaches and methods should be drafted and used in the future for the capability evaluation needs of this or that worker to be able to hold a relevant appointment, and will simultaneously delegate them the responsibility to prove the development or increase of their own capability.

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