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# CLASSIFICATION PROGRAM

- **JOB ANALYSIS**
- **JOB DESCRIPTION**
- **JOB EVALUATION**

TRAINING AND DEVELOPMENT

**CANADA DEPARTMENT OF EXTERNAL AFFAIRS**

## INTRODUCTION

Perhaps the most important feature of the new classification system is the provision for delegation of classification authority by the central agency to the departments. While delegation is made to deputy heads in the first instance, it is the expectation that this authority will be extended to appropriate managerial levels within the departmental programmes. This is, of necessity, a long-range objective which can only proceed in pace with the ability of the Department to train managers in the use of the system. In this respect every effort will be made to extend training to responsible managers on the basis of their prospective involvement in the classification process. (The first course was conducted in April 1968.) Meanwhile the classification process will be centralized in the Departments; Personnel Branch and will operate in accordance with the procedures outlined in Chapter 2, Page 6.

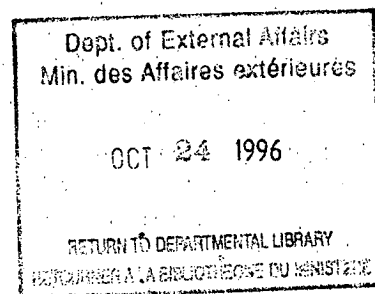
Position classification involves a variety of techniques, some of which are specialized to a degree that requires concentrated training and experience. It is neither practical nor necessary that managers be trained in depth on these phases of classification. It is necessary, however, that managers gain an awareness and appreciation of the classification process in order that they can fully utilize specialist assistance available to them in conducting their classification programmes.

Classification techniques have application for many purposes other than position classification. Therefore knowledge and skill acquired in this particular field may be put to good use in other areas of manpower control and management.

This manual has been produced to serve managers as a continuing source of reference on classification techniques and procedures. While techniques remain reasonably stable, departmental classification procedures will undergo change as delegation is implemented.

Although the manual will be revised from time to time to reflect procedural refinements, it may be used at anytime as a guide in resolving current classification situations.

Under-Secretary of State  
for External Affairs



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## GLOSSARY OF CLASSIFICATION TERMS

**Bench-Mark Position**

A position which has been selected for description in the standards to illustrate specific degrees or levels. Each bench-mark position description in a point-rating standard consists of a brief summary, a list of the principal duties with the percentage of time devoted to each, and specifications written in terms of the factors used in the rating plan.

**Category**

One of six major occupational divisions of jobs in the public service, i.e., Executive, Administrative and Foreign Service, Scientific and Professional, Operational, Technical and Administrative Support.

**Class**

A group of jobs (made up of positions) which are similar by nature of duties, though differing in levels of difficulty and responsibility. Under the old classification system positions were identified by class and grade, i.e., Clerk 2; in the new system classifications appear as an occupational group and level, i.e., CR 2.

**Classification Audit**

The assessment of the application of the classification system by inspection of particular positions, jobs, or units. The objectives are: to ascertain that the standards are properly applied, proper procedures employed, and documentation accurate. Treasury Board Classification Audit has the additional objective of ascertaining that current policies and standards are realistic and viable.

**Classification Review**

The reconsideration of the classification assigned to a position with or without new or additional information, and which may or may not result in a new evaluation. The Bureau of Classification Revision conducts the review of positions red-circled on conversion.

**Classification Revision Programme**

The plan of action developed to implement a new system of classification and pay within the recommendations of the Preparatory Committee on Collective Bargaining.

**Consensus**

Group judgement – in point rating, agreement of the rating team on the degree of a factor present in the job being rated.

**Conversion**

The process of changing the designation of positions from the class and grade assigned under the old system of classification to the group and level assigned in the new system.

**Degree**

A definable, distinguishable level within a factor in a point-rating scale.

**Delegation**

In the job evaluation context, the devolution of authority to classify positions from the centre to the component units and within those units.

**Duty**

An aggregation of related tasks; a portion of the work of one position. When enough are grouped together, a position has been created.

**Element**

A sub-division of a factor, e.g., the factor "Knowledge" might be described in two sub-factors or contributing elements, namely, "Education" and "Experience".

**Factor**

One of the characteristics that is common to all jobs in an occupational group; it is capable of being defined and measured through the use of the Classification Standard for the group.

**Factor Comparison**

A quantitative method of evaluating jobs in a single organization by comparing the factors of a job with a range of like factors taken from key jobs and which have been assigned a monetary value.

**Factor Description**

A short paragraph under a factor heading which matches a factor in the Group Classification Standard used to rate the job. Each factor description should contain sufficient information to enable the Classification Committee to determine the correct factor point value.

**Grade Description**

A non-quantitative method of job evaluation in which the duties and demands of a whole job are compared with a range of whole job level determinants which specify the characteristic duties and demands of each level.

**Green Circle**

The classification conversion of a position resulting in a salary range higher than that already carried by the employee.

**Guidelines**

The regulations, policies, oral or written instructions, work methods, procedures, precedents, laws, professional standards, sources of information or other terms of reference management requires the employee to observe in performing his work assignment.

**Heterogeneous Group**

An occupational group comprising jobs or positions whose duties appear to be quite different but which can be evaluated with the same factors.

**Homogeneous Group**

An occupational group comprising jobs or positions whose duties are quite similar and which can be evaluated accurately and economically by the grade description method.

**Job**

One or more positions having almost identical major duties and responsibilities, e.g., an establishment may have ten positions for the one job of proofreader.

**Job Analysis**

The systematic collection, by questionnaire, interview (or a combination) of:

- the duties of the job
- the qualifications necessary to perform them
- the mental and physical requirements
- the hazards, if any.

This is followed by:

- an analysis of data
- the writing of precise, concise, factual descriptions of duties, qualifications, and other pertinent information in standard form.

The result should be a report consisting of:

- a complete and accurate identification of the job
- a complete and accurate description of the duties
- a careful assessment of the requirements made on the worker to do the job
- possible by-product data.

**Job Analysis Schedule (or Position)**

The document on which (in final form) all significant information concerning the job is recorded.

**Job Description**

The written description of work performed, or to be performed, preceded by data identifying the job in its setting and including a descriptive job title, a summary of duties, a detailed description of duties performed and of the demands made by the job on the incumbent.

**Job Evaluation**

The process of determining the worth of a job in relation to other jobs in the structure or organization. In the current programme, its purpose is to establish the relationship between jobs in an occupational group in the new classification and pay system. The four basic methods of job evaluation are ranking, grade description, point rating and factor comparison.

**Job Specification**

A summarized description of the work, of the education, knowledge, abilities, skills, and any other requirement the worker needs to do the job.

**Job Summary**

A paragraph briefly describing the purpose, scope and content of the job; it enables the reader to see how the job differs generally from other jobs. It should be adequate for advertising purposes.

**Job Title**

A descriptive title to identify the type of work performed. It should distinguish the job from other jobs and it should not be inverted, e.g., Storeman, Pharmacy, without good reason.

**Level**

Counterpart of "grade" in the old class and grade system; relative value within a group; when added to the code sign for an occupational group, a means of designating the "group and level"; in an occupational group evaluated by the point-rating system, the range of points values within which positions would be of equal value for purposes of defining rates of pay.

**Level Determinants**

The criteria, listed in a classification standard of the grade description variety, used to determine whether a specific job rates at level one, two, three, etc., in the occupational group.

**Point Rating**

A quantitative method of job evaluation in which the duties and demands of a job are compared factor by factor with a predetermined scale of defined factor degrees which have been assigned numerical values, making it possible to arrive at a total job value.

**Position**

The requirement for a number of duties to be performed by one incumbent at a specific location or work station. Exists without an incumbent.

**Ranking**

A non-quantitative method of job evaluation in which whole jobs are compared with each other to determine their rank order from the most difficult to the least demanding.

**Red-Circling**

A salary range provided for incumbents whose positions have been assigned to a lower maximum salary. Incumbents in holding classifications (Red-Circled) may progress to the top salary of the old class and grade of the position but will not receive further increases until the salary range of their converted positions exceeds the range for the class and grade in which they are held.

**Standards**

The criteria used in determining the allocation of positions and jobs to groups and levels in the new system of classification and pay. They consist of an introduction, a definition of the one occupational group to which they apply, - point-rating scales or level determinants and bench-mark position descriptions.

**Sub-Group**

A sub-division of an occupational group to facilitate evaluation and allow greater flexibility in pay planning. The Hospital Services Group has two sub-groups.

**Task**

A unit of work activity which forms a part of a duty; one of the work operations that constitutes a logical and necessary step in the performance of a duty.

## CHAPTER 2

### THE CLASSIFICATION SYSTEM AND MANAGEMENT'S ROLE

#### Prelude to New System

In 1964 the government announced that a new system of classification was to be introduced within the Public Service of Canada. This signified the adoption of certain recommendations made by the Glassco Commission and the Preparatory Committee on Collective Bargaining concerning the structuring and control of classification and pay.

The Commission studied government organization and observed upon the unwieldy nature of the existing system which, due to the proliferation of classes, grades and pay plans, had become difficult for centralized control. They recommended that responsibility for classification and pay policy be vested in Treasury Board and suggested that within guidelines established by the Board, departments be given authority to classify their positions.

The Preparatory Committee on Collective Bargaining formed in 1963 to advise the government on how to prepare for collective bargaining, recommended a single new system of classification and pay for civil servants (no change in the existing system for locally engaged staff was recommended at this time). The new system was to be based upon the principle of occupational grouping to facilitate the establishment of work relationships. In this way it would provide a logical framework for the determination of bargaining units. The Commission also suggested that the system be designed to permit extensive delegation of classification authority to departments.

The new system follows the principle of occupational grouping and is intended to be more flexible and responsive to the needs of management than the one it replaced. Its objectives include the eventual delegation of classification authority to departments, and are consistent with the concept of managerial responsibility and accountability.

#### The Structure of the New System

The occupational category is a family of occupations related, in broad terms, by the nature of the functions fulfilled and by the extent of academic preparation needed by people engaged in these occupations. There are six occupational categories.

- (1) The Operational Category includes twelve groups in which manual and related work of an unskilled, semi-skilled or skilled nature is performed and supervised. Two of the groups apply to occupations in the Department:

General Labour and Trades Group  
General Services Group.

- (2) The Administrative Support Category includes six groups in which the preparation, transferring, systematizing, and maintenance of records, reports and communications, or the direct application of rules and regulations, or the supervision of these functions, are performed. Four of the six groups are used by the Department:

Communications Group  
Clerical and Regulatory Group  
Office Equipment Group  
Secretarial, Stenographic, Typing Group.

- (3) The Technical Category includes thirteen groups in which specialized techniques are performed that require highly developed skills and a defined minimum of secondary school education. Four groups are employed in the Department:



Drafting and Illustration Group  
 Electronics Group  
 Engineering and Scientific Support Group  
 General Technical Group

- (4) The Administrative and Foreign Service Category includes thirteen groups engaged in the planning, execution, conduct and control of programmes including those directed toward the public and programmes of internal management. Eight groups are used by the Department:

Information Services Group  
 Organization and Methods Group  
 Personnel Administration Group  
 Programme Administration Group  
 Foreign Affairs Group  
 Administrative Services Group  
 Administrative Trainee Group  
 Financial Administration Group

- (5) The Scientific and Professional Category is composed of twenty-eight groups in which specialized qualifications attained in university, or a professional institution and specific to each occupational group are required. Six only of the twenty-eight groups are employed:

Architecture and Town Planning Group  
 Economic, Sociology and Statistics Group  
 Engineering and Land Survey Group  
 Historical Research Group  
 Law Group  
 Library Science Group

- (6) The Executive Category is composed of the group engaged in senior managerial and policy-making responsibilities, or in tasks calling for exceptionally high standards of performance in the development and execution of policy or in the introduction of new or improved administrative processes. At the present time, no groups have been defined.

The seventy-three occupational groups are each designed to encompass positions in which like functions are performed. Their formation requires identification of jobs of similar occupational nature and where possible identification with a component of the labour market outside the public service.

The various levels described in each occupational group provide distinct strata of responsibility and job complexity found in the respective occupations. The successive levels within each occupational group provide a normal progression that is available to all qualified employees.

#### Introduction of New System

Conversion of position classifications from the old to the new system was affected through the Classification Revision Programme. The Bureau which was established for this purpose had the added responsibility of developing the system, in detail, concurrent with conversion. This was a formidable task requiring the collection of information on some 200,000 positions and the development of standards and rating plans.

It should be borne in mind that "conversion" refers only to the change from the old to new system of classification and became effective on the dates established as follows:

October 1, 1965	Administrative Support Administrative and Foreign Service
October 1, 1966	Operational
July 1, 1967	Technical Scientific and Professional Executive

The establishment of a new position or a change in the present classification of a position made subsequent to the conversion date of the category to which the position belongs constitutes an initial classification of the new position or a reclassification of the existing position.

The new classification system has replaced an outdated and cumbersome system that was not in accord with present day demands on the public administration. It has provided management with a system of classification based on modern concepts and techniques which can be applied as close as is possible to the place where work is actually done.

The Glassco Commission's recommendation to place responsibility for classification and pay with Treasury Board was implemented on March 1, 1967, through amendment of the Financial Administration Act. In addition, the Board was empowered to delegate classification authority, as it saw fit, to departments. On that date the Bureau of Classification Revision became an agency of the Board. The word "Revision" will be deleted from its title when the conversion programme is completed and the agency will continue as the Board's central classification authority.

#### Delegation of Classification Authority

The delegation of classification authority by the Treasury Board to the Department will be supported by a Memorandum of Understanding signed by the Under-Secretary and Secretary, Treasury Board which will set out conditions and limitations within which the authority is to be exercised, as follows:

- 1) All classification actions shall be consistent with policies and procedures as laid down from time to time by the Treasury Board, and in accordance with the classification standards developed and promulgated for the categories, groups and levels of the new classification system.
- 2) Nothing in the Memorandum shall be construed as modifying or amending in any way, establishment control policies and procedures as enunciated by the Treasury Board from time to time.
- 3) Treasury Board will establish from time to time definite limitations on the exercise of delegated authority and may at any time revise, rescind or reinstate this authority as it sees fit.

In addition the Department is committed to:

arrange for further decentralization of classification authority in the organization;

ensure that each official under his supervision possessing classification authority and each official engaged in the actual work of classification and pay administration is fully conversant with the programme and its objectives and is competent to discharge the responsibilities conferred upon him;

develop appropriate internal inspection, review and audit procedures to ensure the effective administration of the system;

maintain clear and current records of all classification actions and make such records available to the Treasury Board staff on request; and

co-operate with the Treasury Board staff in order to facilitate the Board's audit and review programme and to contribute to the development and maintenance of standards and effective and realistic classification policies and procedures.

A Procedure for Corrective Action is also established in the Memorandum. Where, as a result of audit, or review, the Treasury Board judges that a classification action does not conform with specified standards, the following action shall be taken by the Deputy Head:

- (a) Where the position is vacant, the category, group and level shall be changed to that specified by the Board effective immediately such notice is received.
- (b) Where the position is occupied and is deemed for any reason to be underclassified, the category, group or level shall be changed to that specified by the Board on a date determined by the Board.

- (c) Where the position is occupied and is deemed to be incorrectly classified as to category and group, but not as to level (in that the correction will not affect the pay range), the category and group shall be changed to that specified by the Board on a date to be determined by the Board.
- (d) Where an occupied position is deemed for any reason to be overclassified, the department shall be allowed 60 days, following the determination of the new classification, in which to transfer the incumbent or to alter the duties and responsibilities of the position in order to avoid placing the incumbent in a holding range. If such actions are not possible, the position shall be assigned the appropriate lower classification and the incumbent is to be recertified to the new classification of the position and retained in the range of rates of his old classification with retroactive effect to the beginning of the 60-day period of grace.

A further section of the Memorandum stipulates the records and procedures that are to be maintained and followed by departments in support of classification activities.

The ultimate objective of delegation is not to substitute departmental centralization for service wide centralization. The full benefits of delegation will only be realized when decision making authority in classification and pay administration is delegated within departments to the lowest practical level of departmental management. This objective is consistent with the principle of managerial responsibility and accountability. It will, however, take time, resources and training to be realized.

If total management is the business of getting things done with money, materials and people, and is a clear responsibility of the line manager, then personnel management can only be regarded as the utilization of human resources in accomplishing programme goals, and is equally the responsibility of the line manager. Position classification as a personnel function is, therefore, an integral part of the total management responsibility.

The purpose of delegating classification authority is, therefore, not taken just to decentralize a system which would otherwise be impractical. It is primarily to provide managers with another resource to aid them in the efficient organization and administration of their programmes.

The manner in which classification is to be administered by departments is implicit in the Memorandum of Understanding. It is to be consistent with the policies and procedures laid down by Treasury Board and in accordance with the classification standards. In effect then, the degree of discretionary judgement implied by delegation is limited to that which is inherent in the standards.

#### Departmental Classification Procedures

The implementation of an ongoing classification programme in the Department will be accomplished initially by establishing committees in Ottawa to evaluate all requests for classification changes as well as establish classifications for new positions. The committees will normally consist of an officer representing the Division sponsoring the classification action, another officer who is familiar with the programme in which the position is engaged or is knowledgeable of the classification to be considered, and, as well, one or more Classification Officers.

Requests for the classification of a position or job should be made by the Head of the Division or Post in which the position is situated whenever, as a result of an organizational or work change, a new position is to be established or the duties of an existing position are substantially altered.

Classification requests should take the form of a completed questionnaire (these are available in the Personnel Branch), an organization chart showing the relationship of the position concerned to others in the same organizational unit and a commentary regarding the reason for the proposed change and the effective date required. These should be forwarded to the appropriate Programme or Branch Director at headquarters who should concur in the request before it is submitted to the Classification Committee.

The Classification Officers in the Personnel Branch may be consulted on all classification proposals and will provide advice and assistance to management if it is required.

The principles, procedures and uses of the classification standard are outlined in the remaining chapters of the manual.

## JOB ANALYSIS

Job Analysis can be defined as a systematic collection and analysis of the essential data about duties constituting a job. These include all factors relating to the mental, physical and responsibility demands made upon the incumbent to perform the duties successfully. It requires an analysis of job data to sift out the major and minor essential ingredients and record the information in a prescribed descriptive form using clear, concise language and following certain standard word usage. Because of the complexities of job analysis, there is a need for the training and development of specialists in this field to aid line officers. At the same time, line officers should achieve an understanding of job analyst techniques and a considerable degree of skill in their performance. Knowledge in this field is essential if the line officer is to communicate his requirements to the job analyst, comprehend fully the nature and demand of the work done under his direction, make logical and effective work assignments to his staff, and particularly in job evaluation.

**Uses of Job Analysis**

The job analysis and the resulting job description, with or without specifications or factor descriptions, can be used for a variety of purposes by line and personnel officers. Here are a number of functions which can be served:

Job Evaluation – The study of job facts reveals what constitutes the work, the degree of difficulty and responsibility involved and the knowledge, skills and effort required of the workers to do the job. It therefore provides a basis for determining the relative value of jobs within an organization.

Recruitment and Selection – It provides the information necessary to publicize jobs, to guide the selection interview and to test the candidate's knowledge, skills and abilities.

Staff Development – Job information is required for the study of career patterns, development of controlled promotion plans, the planning of rotation schemes and for comprehensive, long-range manpower plans. It also provides a starting point for determining areas where improvement can be made and for setting the goals and time limits for such improvements. Thus, training on the job can be planned for a particular individual or formal training courses can be planned when, after a change in work methods, numbers of individuals are found to require the same training.

Safety and Protection of Health – Job data includes specific information about possible hazards and dangerous working conditions.

The Handling of Grievances – Job analysis provides the means for a common understanding between management and staff of the duties and responsibilities of particular positions and thus eliminates one possible source of grievance by misinterpretation or misunderstanding of a particular work situation.

Employee Appraisal – Attempts to rate or appraise an employee without reference to the requirements of his job are meaningless. It is essential that an employee's performance be measured for knowledge, skill, ability and effort against the duties that have been formally assigned by management.

Method Improvements – Job analysis may reveal inconsistencies in the division of work such as overlapping of duties, duplication of effort and so on. The identification of such inconsistencies enables line officers to take appropriate corrective action. In addition, job information can be a useful starting point for the study of procedures and the writing of procedural manuals.

Organization Studies – Job descriptions provide managers with a ready source of information on the functions of a particular section or unit. They therefore provide managers with a source of reference on which to initiate, implement or test organizational changes.

**Collecting Job Data**

The initial requirement is to obtain job data and several methods are appropriate for this purpose. Two of the best known are the questionnaire completed by the incumbent and the interview combined with observation.

*The questionnaire method* is useful whenever a large and dispersed population has to be covered. It may be supplemented by interviews in some cases. The data presented in questionnaire form does not necessarily constitute a job description. Questionnaire information, however, does form the basis for the completion of a Job Analysis Schedule by an analyst which includes a description of duties with factor or specification information. The final factor descriptions or specifications, including those in bench-mark positions used in classification standards, should be written without the use of any words or phrases which predetermine the rating. Otherwise, the effect is that the evaluation is done by the analyst, or at least predetermined by him, rather than by the preferred approach of the classification committee. The not uncommon practice in the government service of classifiers filling the dual role of analyst and sole evaluator runs counter to good job evaluation practice. The exercise of pooled judgement is the best way of ensuring that all evaluation plans are fairly and effectively used.

The design of job analysis questionnaires and job analysis schedules is a task which should be done by a group of specialists possessing experience and skill in this field. Usually these persons are also concerned with the development of classification standards. Departmental variations of these questionnaires and schedules should only be used when the exigencies of a particular situation demand it and then only with the approval of the central standards group.

When questionnaires are used, it is important that the employee's supervisor be involved. The questionnaire should come through the supervisor to the analyst and should be the basis for the analyst's discussion of the job with the supervisor. This approach is important because employees do not necessarily recall and identify all their duties. Alternatively, they may over-emphasize one duty and under-emphasize another or they may not express themselves clearly. For these reasons, questionnaires alone have their limitations and can only be used when there is a reasonable expectation that the respondents can express themselves in writing and can understand and follow the instructions provided. In some situations, for example, when dealing with a trades and labour group, it might be preferable to have a questionnaire completed by someone at a supervisory level rather than by the employee.

The position description will have to be written, or at least drafted, by the supervisor himself whenever a new position is being created or when significant changes are to be made in the duties of a position. Moreover, *position descriptions should always be reviewed when a position becomes vacant and should be rewritten or revised if work changes have either taken place or have been approved.*

*The interview combined with observation* is conducted at the work site. The analyst observes and questions the worker about the tasks being performed. It provides complete and accurate job information which minimizes the likelihood of interpretive errors. This method is used whenever the jobs being covered require observation as well as interview for a full appreciation of what is being done. It is therefore appropriate for operational and technical jobs as well as for some in the clerical and administrative groups. It may also be used, with less emphasis on observation, for professional and executive jobs which may be difficult to comprehend without a first-hand account of the work from the incumbent.

Managers have an important role to play in the preparation for and conduct of interviews. The analyst who may be a classification specialist or member of the manager's staff selected for this purpose should have an opportunity to study and familiarize himself with the data relevant to the position in question. This may consist of organizational charts, statements of work objectives, work flow statistics, programme reports, descriptions of related positions and written instructions which provide guidelines for the work. The job analyst should in the first instance consult the manager to determine the selection of background job data.

Several interview sessions may be required in the analysis of a single position. These can best be arranged through the auspices of management in order that they are conducted at a time and place convenient to the work and under conditions which facilitate the provision of information.

In essence, the purpose of a job analysis interview is to determine the 'What', 'Why' and 'How' of each duty allocated to the position by management. In addition, the skill and knowledge required to perform the duties must be identified and described. *Information gathered during a job analysis and incorporated in a job description must be authenticated by management before the description is considered valid.*

Interviews are, of course, necessary to supplement information gathered by other methods when the data appears to be incomplete, vague or lacking in objectivity. They will also be combined with observation in conducting classification audits.

*There are other methods of collecting job data* which are less frequently used than those already mentioned but they have limitations which restrict their use to particular situations or circumstances. An example is the use of a *Technical Advisory Committee*, which is usually a group of officers senior to those whose job or jobs are to be described and who are fully conversant with a fairly complex type of work. There is also *the group interview*, when a number of persons doing the same job are brought together to write a composite job description. This may be used on occasion for intermediate or senior officers, who all do the same type of work, and who, perhaps, are being brought together for a training seminar or workshop.

*Another approach is to have management personnel briefed to write their own job descriptions in close-to-final form.* This is often a very useful exercise as it disciplines the individual to think through, carefully, what he has been doing and the extent to which his duties and responsibilities do, in fact, match his terms of reference.

### The Job Description

The job description is, in fact, the very essence of the job analysis process, since it is the distillation of all the data that have been collected about the work performed, put down in logical, orderly, and concise form. It is the starting point for the preparation of recruiting specifications, for the rating or evaluation of jobs, for the study of training needs, and for the preparation of occupational or class descriptions. If it is incorrect or misleading, then a number of important judgements, related to these personnel activities and based on the job description, will be unsound.

Job descriptions vary somewhat in format from one agency or department to another. However, the majority of descriptions are written in three recognizable parts:

1. **Job Identification.** All the information necessary to identify the job without describing it in any detail.
2. **Job Summary.** This may be a one sentence statement of the essential purpose of the job or it may be a paragraph briefly describing the purpose, scope, and content of the job.
3. **Job Duties.** A more detailed description of the work performed, duty by duty, by order of importance, or in chronological order and frequently showing the percentage of time spent on each.

### Analysis of Job Data

When the analyst has collected all the job data necessary, he reviews it to determine the major and minor essential ingredients, in order to prepare his job description. He may have an employee questionnaire or a rough job description and, if he has interviewed the worker, a series of notes. He may also have supporting data, such as organization and work flow charts, and samples of the work done by the employee: reports, art work, publications, financial statements, and so forth. He analyzes this information, verifying his preliminary conclusions concerning the duties and the mental, physical and responsibility demands against the supporting data and the objectives of the work, makes any adjustments indicated, and arranges the duties in logical order. He determines **WHAT** is done, **HOW** and **WHY** it is done and the **SKILL INVOLVED**, and organizes the facts concerning each duty in terms of this formula.

### Job Description Writing

After this preliminary analysis and organization of his material the analyst, beginning with the most important duty, composes a paragraph on each which will tell the reader **WHAT** is done, **HOW** it is done and **WHY** it is done. Each duty should begin with an underlined flag statement which gives the key to the whole duty. The flag statement will be the beginning of the longer sentence and will state **WHAT** is done.

For example:

*"Reviews office procedures and methods to ensure the fastest and most efficient flow of documents to the units which will take the actions required...."*

The flag statement could also be a separate short sentence which gives the key to the whole paragraph.

For example:

*"Receives and places telephone calls: Answers division telephones giving information on division activities and personnel whenever possible, or refers calls to person requested or qualified to answer the inquiry. Places calls upon request of officers of the division to save officer's time in reaching the person in question or to relay information to another officer or clerk."*

It is not always necessary to explain why an action is taken or even how it is done in some cases. This occurs most frequently in describing very simple duties when the WHY particularly, and occasionally the HOW, is self-evident. In the foregoing example, WHAT and WHY are covered but not HOW, as every reader is familiar with the manner in which a telephone is operated.

Job description writing is often an exacting and difficult task. It forces the writer to think clearly and to express himself precisely in language which is simple and economical. A competently prepared description looks simple and consequently, it is often assumed that its production was a relatively simple task. This is not the case. A good description is compact, clear and concise, which are all qualities that demand an orderly and disciplined approach. A good job description writer will make a number of drafts before he produces one that is reasonably satisfactory.

The language of job description writing should consist of precise, concise, factual statements which give a clear understanding of actions or activities being accomplished, how they are accomplished and their objectives. Each sentence should begin with a descriptive verb in the third person singular present tense. The verbs may be changed, if desired, to the infinitive form when using job summaries of job descriptions for recruiting and selection purposes, but the third person singular present tense is required for job evaluation purposes. A specific action verb plus an object gives WHAT is done and the sentence should begin with WHAT is done rather than with an introductory HOW phrase: "Cuts wood, using a powerdriven saw....."

The verb is probably the most important word in the whole sentence; therefore, great care must be exercised in its selection. Vague or ambiguous verbs like "prepares", "handles", "assists", "looks after", "is responsible for", "participates in" should be avoided as these verbs give no clear picture of the action or activity. For instance, "prepares estimates", could mean "Types estimates of costs"; or "Assembles cost figures"; or "Estimates future costs on the basis of previous years' costs and other factors such as...."

The job description writer must pin-point the action in his opening phrase by choosing a meaningful action verb like "Checks typed copy for errors"; "Evaluates jobs using a point-rating evaluation plan in order to establish the relative worth of the jobs to the organization"; "Writes (not prepares) a report..."; or again, "Drafts a report for (someone else)..." "Sits on boards..." is an example of an ambiguous phrase. This could be taken to mean either "Sits on a plank" or "Interviews and rates candidates as a member of a selection board".

There are certain conventions of style which should be observed when referring to minor duties. Duties which are rarely performed but which have some real significance and which might require the employee to possess a particular skill, should always be included in the job duties but should be listed after the more time-consuming duties. The paragraph describing such duties should commence with the word "Occasionally", e.g., "Occasionally writes progress reports...."

As stated elsewhere in this manual, a "job" can consist of one or more positions. Sometimes the incumbents of only one or two of the positions are required to perform duties not allocated to the remaining positions in the job. When such duties are of sufficient significance to be shown, they should follow the "occasional" duties and be introduced by "May", e.g., "May take phone messages for visiting officers."

#### Job Summary

When the job description writer has identified and described the duties and indicated the percentage of time spent on each, he then proceeds to write a short summary of the job duties. This usually consists of one paragraph only and may contain only one or a few sentences. It should describe the job in broad terms but should also conform to the WHAT, HOW, WHY formula. In the federal service it has been agreed that this one paragraph

summary should always commence with a phrase indicating one of the four levels of supervision received which are:

- (a) **Under Supervision:** This level involves the greatest amount of supervision and control from above. The employee's assignments, his objectives and the sequence of detailed steps in his work are prescribed for him. However, he is held personally responsible for the accurate and proper application of the steps after he is thoroughly familiar with the technique of his job. The word "supervision" does not imply that the employee works directly under someone's eye but does imply that each stage of his work is reviewed and checked. He is a trained employee in work of a given class. He is presumed to be able to recognize instances which are out of the ordinary and consequently upon which he obtains advice or further instructions.
- (b) **Under General Supervision:** On this level, control from above is a general control not intimately bearing upon the details of the employee's work. The employee is accountable for accomplishing the prescribed objectives, with freedom from control or oversight while work is in process. The employee is expected to solve most problems of detail except those of an unusual nature, that come up in the course of his work. His work is generally reviewed on completion for adequacy and compliance with instructions.
- (c) **Under Direction:** A person on this level has been directed to achieve a definite objective. The organization of the work and the methods of producing the desired results are his responsibility. He is expected to overcome all problems of a technical or subject matter nature and to meet and to solve such general problems as are governed by the plans, policies, procedures, and purposes of his defined area of work. On general problems of wider scope he is expected to consult his colleagues and seek advice from superiors. Although making no decisions which affect policy, he may from time to time make recommendations on policy as it relates to his area of work.
- (d) **Under General Direction:** The degree of control exercised over the work at this level is very broad and takes the form of consultation and discussion with other senior officers on general management matters. The officer normally contributes to policy formulation and long-term management planning. He is expected to make decisions in respect to expenditures of substantial amounts and to approve budgets for designated activities within the organization. Any review of the officer's work takes the form of an assessment of the reports he writes, of the proposals he makes, and of the efficiency of the operation he controls. He normally reports to the Deputy Minister or Assistant Deputy Minister.

The Job Summary provides an important introduction to the job giving the reader a summation of the content, purpose, and scope of the job. It should distinguish the essential characteristics of the position and be so constructed that the reader can visualize the general duty requirements and the environment in which the duties are performed without reference to any of the subsequent sections of the description. It should be adequate for advertising purposes when recruiting to fill vacancies.

#### Factor Descriptions or Job Specifications

Most of the classification standards or job evaluation plans now being used by classification committees are based on a group of factors such as knowledge, skill and responsibility requirements, which distinguish between the difficult and the less demanding jobs. Factor descriptions or specifications are short descriptive paragraphs added to the job description to provide further information concerning the application of each factor to the job. They serve as a link between the duties described and the factors of the evaluation plan for the use of the classification committee in evaluating each factor of the job. Examples of factor descriptions may be found in the bench-mark position descriptions included with all classification standards now in the possession of personnel officers.

#### Guide for Job Description Writing

- (1) Keep sentences short, simple, and to the point.

The less trouble the reader has with your writing, the more attention he can give to what you are writing about.

- (2) Use only words and phrases that are necessary and contribute to the description.



Unnecessary words and phrases not only waste the reader's time and energy, but distract him; he doesn't know what you consider to be necessary or unnecessary. In addition, extra words and phrases add to the chance of his misunderstanding what you write.

- (3) Each sentence should begin with an action verb, the worker being the implied subject. Since the job description tells what a worker does on the job, active verbs which describe exactly what he does should be used.

Examples:

*"Arranges for medical examinations and eligibility investigations...."*

*"Reviews accounts submitted for the payment of...."*

*"Assembles sterile supplies for distribution to wards and operating rooms, by...."*

- (4) The present tense should be used throughout the description, e.g., *"Registers applications for assistance...."*
- (5) Description of duties should be specific with emphasis on the skills and purposes involved, and should not be allowed to develop into a detailed motion study. Elimination of such details throws emphasis on the questions WHAT, WHY, and HOW.

Thus:

*"Takes \_\_\_\_\_ work order from the drawer; writes information on work order; listens to caller on the phone; may talk with other department heads; hands work order to worker doing job...."*

becomes:

*"Writes work orders for jobs from telephone calls or conversations with operating supervisors."*

- (6) All important tools and equipment used by the worker should be mentioned specifically and should be identified by manufacturer's name, type and model for purposes of clarity.
- (7) All references to other job titles, departments, sections, machines, and the like should be specific. This is necessary if the descriptions are to be clear, accurate, and definitive.
- (8) All references to other job titles should be by full title written in capitals. Full capitals should be used for all job titles throughout. (e.g., PERSONNEL OFFICER). This serves to spotlight the relationships which the particular job being described bears to other jobs.
- (9) All names of departments and specific machines should be written with initial capitals. (e.g., Personnel Division)
- (10) Any qualifying or incidental explanatory information should be written in parentheses to show that it is not an integral part of the description of the job. This practice will help the reader to know what is essential and what is not.

Pitfalls to Avoid

1. Poor choice of verbs: use of vague, imprecise or too general verbs.
2. Neglecting to clarify HOW and WHY of duties where this is not self-evident.
3. Carelessness in describing exact nature of supervision exercised and extent of supervision received, i.e., in bringing out clearly the decision-making aspect of the job.

4. Unrealistic percentages for each duty, e.g., too much for supervisory, planning or liaison activities, insufficient for certain minor, easily overlooked or underestimated duties such as answering enquiries, filing, attending the public.
5. "Over-writing", i.e., creating a false impression of the importance of the job by use of grandiose terminology, e.g., "co-ordinates" for "assigning", "statistics" instead of "data" or "lists", "auditing" instead of "perusing", "checking" or "inspecting", "directing" instead of "supervising", "negotiations" instead of "discussions" or "meetings", "researches" instead of "locates", "seeks", or "studies".
6. "Under-writing" by predetermining the important aspect of the job and not giving proper attention to other aspects which may be equally important from the job evaluation standpoint.
7. Using adjectives unduly - these are value words which should be used only in conjunction with examples, e.g., "reviews the more complex cases, for example....." Some adjectives commonly used without definition or illustration are "difficult", "major", "specialized", "significant".
8. Describing the job as it should be done when in fact it is done quite differently; this is a systems approach, not job analysis from the job evaluation standpoint.
9. Making unsupported judgemental statements such as "the work is complex and varied" in the factor descriptions instead of providing, as far as is possible, facts and evidence to support the job descriptor. The factor description for "Complexity" or "Decision Making" for example, should provide concrete illustrations of the judgement and initiative required in the work and the freedom to take independent action to judge the degree of the factor.

The work is performed in accordance with general departmental instructions and established practice. It requires modifications to general departmental instructions in order to meet the requirements of the specific institution, and changes in established practices to meet emergency and other special situations.

10. Including employee qualifications that are personal and do not relate to the job, or including duties that an employee is qualified to perform but is not required to perform; this is an incumbent-oriented approach and is not proper job analysis.
11. Pre-supposing job content on the basis of one's knowledge of the field or of a similar job; if one is familiar with a particular field of work it is very easy to make assumptions about a particular job in that field.

### Job Description Writer's Check List

Answering the following questions will assist the job description writer to produce a more accurate draft job description.

1. Is this sentence as short, simple, and to the point as I can make it?
2. Is every word and phrase necessary? Does each contribute to the description?
3. Does each sentence begin with an action verb? Can the passive verbs be converted to active verbs?
4. Are all verbs in the present tense?
5. Are the HOW and WHY of the duties stated where not self-evident?
6. Have I used "may" where I mean "may", and "occasionally" where I mean "occasionally"?
7. Are all important tools and equipment identified by manufacturer's name, type and model?
8. Are all references to other departments, sections and machines, specific and written with initial capitals, e.g., Personnel Division?
9. Are all references to other job titles given in full and written in full capitals, e.g., PERSONNEL OFFICER?
10. Is all qualifying or incidental explanatory information written in parentheses?

### Updating Job Questionnaires and Descriptions

Questionnaires were used extensively during the conversion programme to obtain job information. They were produced in a variety of forms ranging from two to twelve pages according to what was thought suitable for each occupational group. The many thousands of employees who were confronted with the task of completing them gained an appreciation of the intricacies involved in describing their duties and supplying the required supplementary information.

Copies of questionnaires completed for conversion have been retained on position files at headquarters. For some time to come these conversion questionnaires will constitute the major portion of the job description material held in departmental records. Individual questionnaires are superseded and updated by job descriptions whenever a new classification action occurs. However, the number of positions for which updated descriptions have been produced in the post-conversion period is small in comparison with the department's total establishment.

The circumstances which prevailed during the conversion period, such as the limitation of time and the reorganization of programmes, were not always conducive to the provision of lasting job descriptions. Managers would therefore be well advised to examine questionnaires to ensure that they correctly reflect the current authorized duties and responsibilities. When it is found that they do not accurately describe current work, they should be replaced by new questionnaires or descriptions and forwarded through the appropriate Programme Director for classification review.

## DEFINITIONS OF ACTION VERBS FREQUENTLY USED IN JOB DESCRIPTIONS

Adjust	To bring to a satisfactory state.
Advise	To give advice or to offer counsel.
Allocate	To apportion for a specific purpose or to persons or things.
Amend	To alter formally by modification, deletion or addition.
Analyze	To study or determine the nature and relationship of the parts of by analysis.
Appraise	To estimate the value or amount of, or to judge as to quality.
Approve	To sanction officially; to accept as satisfactory.
Arrange	To make an agreement with another or others, to schedule.
Assemble	To collect into one place or body, or to fit together the parts of.
Assign	To fix, specify or designate, to determine authoritatively, to allot or apportion.
Assist	Do not use. Instead use an action verb such as Types, Checks, Collates, to describe WHAT the employee does.
Assure	To make certain and convey to others the certainty that an event or action will take place.
Attend	To be present.
Audit	To examine officially in order to assess performance against regulations and accepted standards.
Authorize	To grant permission for the conduct of an activity. (This implies that prior approval in principle has been given by higher authority).
Brief	To give essential information; to summarize.
Calculate	To determine by mathematical processes.
Carry Out	Implies performance of a variety of related tasks. It is preferable to describe activities in more definite terms, such as Inspects.
Change	To alter to make an essential difference.
Check	To control, test, verify, investigate by means of inspection or comparison.
Classify	To group or segregate in classes in accordance with an established system of relationship.
Collate	To compose carefully in order to verify and often to integrate.
Collaborate	To work or act jointly with another with equal responsibility.
Compile	To collect; to compose out of materials from other documents.
Compose	To put together in a fashion involving adaptation of forms of expression.
Compute	To estimate numerically by mathematical calculation.

Conduct	To carry out in a situation where leadership and guidance usually must be given to those co-operating in the performance of the work.
Construct	To put together the parts of something.
Consult	To ask or give advice or opinions.
Control	To regulate performance in order to ensure fulfillment of that which is prescribed.
Co-ordinate	To bring into harmonious adjustment the actions of two or more organizational units.
Decide	To render judgement or settle on an action to be taken when there is a choice to be made.
Delegate	To entrust to the care or management of another.
Deliver	To hand over or distribute.
Demonstrate	To teach by use of examples.
Determine	To come to a decision as a result of investigation or reasoning.
Develop	To go through the process of evolving the specified action or plan.
Direct	To give authoritative instructions which will guide performance or regulate and control activities.
Disseminate	To bring to the attention of others through the propagation of information.
Draft	To prepare a written statement subject to further editing and approval.
Ensure	To make certain that a specified action takes or has taken place.
Establish	To secure permanent acceptance for a specified action or requirement.
Estimate	To fix or calculate approximately.
Evaluate	To ascertain the value, or judge the relative worth of.
Forecast	To predict events or possible results of actions.
Formulate	Put or state in exact, concise and systematic form.
Give	To present or supply to another.
Implement	To fulfill or put into practice management policies or decisions.
Index	Do not use. Instead use an action verb such as Records, Identifies, to describe WHAT the employee does.
Inform	To keep others aware of developments which may be useful now or in the future.
Inspect	To view closely and critically.
Install	To set up or fix for use or service.
Instruct	To impart knowledge; to inform.

Issue	To deliver or give out.
Interpret	To explain or tell the meaning of.
Investigate	To inquire into, observe and search, in order to ascertain the facts. This action also may involve examination of facts for the purpose of drawing conclusions.
Maintain	Do not use. Instead use an action verb such as Checks, Drafts, Posts, Calculates, to describe WHAT the employee does.
Monitor	To watch over in order to discern indications of possible deviation from acceptable standards so that prompt corrective action can be taken.
Negotiate	To confer formally for the purpose of arranging some matter by mutual agreement.
Observe	To take notice; to comment generally with, on or upon.
Operate	To perform a work or labour.
Organize	To arrange systematically the interdependent parts of an activity or work of a group of persons in order to achieve an objective.
Originate	To produce as new, or to begin the use of.
Participate	To have a share, in common with others, in acting as specified.
Perform	To carry out or execute some action, or to do something with skill.
Plan	To devise or project, a method or course of action.
Preside	To occupy the place of authority; to direct for the purpose of, or to regulate proceedings.
Promote	To encourage the use of; to help bring into being.
Provide	To supply or give what may be required.
Publish	To make publicly or formally known; to announce officially.
Receive	Except in Stores positions, do not use. Instead use an action verb to describe WHAT the employee does.
Recommend	To suggest strongly or propose that specified action be taken.
Record	To write or enter on a form for the purpose of preservation.
Refer	To send, or otherwise bring to the attention of another, something which requires action on his part.
Remove	To change the location of, or to transfer.
Repair	To restore to a sound or good state.
Replace	To take the place of, or to restore to former place.
Report	To give a formal or official account of.
Request	To ask for something, providing a reason or purpose.

Resolve	To answer or solve a problem; to disentangle, unravel, explain, solve, hence to clear up.
Review	To go over or examine thoroughly for the purpose of taking or recommending appropriate action. A review may include an on-the-spot inspection.
Search	To perform a thorough inspection for the purpose of finding something.
Select	To take by preference from among others; to pick out.
Serve	To participate actively in the performance of an assignment; to hold an office.
Sort	To put in a certain place or rank according to kind, class or nature; arrange according to characteristics.
Submit	To offer or put forward for consideration and judgment or decision of another.
Supervise	To exercise active direction over and evaluate those subordinate personnel having a direct reporting relationship and those activities which have been delegated to the subordinate positions.
Test	To critically examine, observe and evaluate.
Transcribe	To make a typewritten copy from shorthand notes or from dictation equipment.
Verify	To establish the accuracy, truth or reality of.

*In all cases where ambiguity might exist, provide a good example of HOW the duty is performed.*

## JOB EVALUATION

**Rating**

The first step in rating a position is to determine the Occupational Category and Group to which it belongs. Study of the job description is necessary to obtain an appreciation of work requirements such as the education or skill needed to do the work and the nature of the work performed.

Each Category contains a family of occupations related in broad terms by the extent of academic preparation necessary and the nature of functions fulfilled. Groups contain jobs of similar occupational nature, requiring similar skills.

Reference to "Definitions of Occupational Categories and Groups", published by BCR is usually sufficient to establish the position's occupational identification. While Category requirements are distinctive, the determination of the group may be less obvious. When uncertainty exists as to the position's correct group, reference should be made to the entire definition of all related groups before arriving at a final judgement. Classification Officers are available to provide guidance with occupation identification problems.

Having determined the correct group allocation for a position, the classification committee may assemble and rate it by means of discussion and resolution. An alternative procedure is for members to rate individually and present their results in committee where discussion of the variations in ratings takes place until a consensus is achieved. The second approach is usually preferred because it enables each rater to exercise his own judgement independently from other members of the committee. The consensus achieved, when they pool their judgements, will sometimes bring to light inconsistencies or omissions in the job data. These may require clarification through further investigation of job data. Although this may add time to the process it does ensure that all aspects of the job have been considered and thus supports the validity of the evaluation.

Each classification standard has been constructed in accordance with the evaluation system selected for the occupational group which it represents. The following will describe the evaluation techniques appropriate to the two principal systems of rating:

**(a) Rating Jobs with a Grade-Description Standard**

- (i) The grade-description standard normally consists of a description of the typical duties and the qualifications required to perform them for each level in an ascending series of levels or grades. After becoming thoroughly familiar with the particular standard or plan applicable to the position under study, the rater will compare the job description with the descriptions of the various levels in order to select the level which the job most closely resembles. He then compares the job he has rated with the bench-mark job included in the standard for that particular level to see if the job appears to have duties and job requirements similar to those described for the bench-mark jobs. If it does, he can feel reasonably sure his rating is correct. If it does not, he must take another look at the standard and examine bench-mark job descriptions for the level above and the level below the one he has selected. He may then conclude that the tentative rating is either one level too high or one level too low for the job in question. A discussion of seeming discrepancies, in committee, will either resolve the issue on the basis of a consensus or further data will have to be sought at the source.
- (ii) It is usual to have a rating form which may be attached to the job description for recording the final committee decision. Alternatively, the form may be made up of a number of separate sheets so that each rater may record his own rating.
- (iii) When rating jobs with a grade-description standard, it may be useful to have ratings of the jobs done individually by the committee members before they meet, and then to convene the committee for the purpose of arriving at a consensus for the whole group. This allows for cross-comparison between jobs being rated and helps to ensure consistency in the application of the standard.



## (b) Rating Jobs with a Point-Rating Standard

- (i) Point-rating and factor-comparison standards are more detailed than those for grade-description plans. Each factor and each element of each factor and the Notes to Raters must be carefully reviewed. The rater will not make an assessment of the total job as in a grade-description plan, but a separate assessment of each of the major areas of job demand, i.e., those factors which have been selected by the designers of the plan as being most significant and characteristic of that particular occupational group. This means he must make a series of separate judgements which will produce a point value for each factor, the sum of the points allotted to each factor being the total value of the job.
- (ii) The job description and specifications provide job identification data, a job summary, a detailed description of the duties and finally, the job requirements or job demands described in precise, illustrative terms under each factor heading used in the plan.
- (iii) The rater must consider all aspects of the position presented to him by this description. He may be able to determine the proper rating on a particular factor from a well-written statement of duties, but the factor description which follows will help him to pin-point the appropriate value for that factor. This is particularly true if the factor has two or three elements having different values assigned to various combinations of these elements.
- (iv) Before deciding the value he will give the job on a particular factor, he must examine the bench-mark job descriptions included in the standard which have the same rating on that factor as that which he has tentatively given to the job in question. This comparison will help him to determine the correct rating. Similarly, when he has completed his rating for all factors and arrived at a total point score for the job, he will compare the job he has rated with bench-mark jobs having a total point value close to the one he has assigned. If this comparison suggests that the jobs are of about equal complexity and responsibility, he will again feel reassured about his rating.
- (v) Each rater should record his rating on each factor and the total point value for the job on a prescribed form which will be given to a member of the committee who will list them either on paper or on a blackboard. The committee then reconciles their point differences, factor, by factor, until they arrive at a consensus for the total point value of the job.

## Committee Rating Procedure

1. Each member reads the job description and other job data to determine the appropriate occupational category and group. Assistance in this task may be obtained by reference to the category and group definitions in the standards.
2. Each member rates the job by
  - (a) estimating value for each factor by careful perusal of factor definitions and guides in the standard,
  - (b) comparing each tentative factor value of the job with Bench-mark factor values,
  - (c) determining value for each factor,
  - (d) adding factor point values to obtain total, and
  - (e) comparing the whole job being rated with Bench-mark positions to which similar total point values had been assigned, as a check on the validity of the total rating and to indicate where adjustments of factor values are necessary.
3. Members meet in committee, achieve agreement on the occupational group to be used.

4. Members present their factor ratings supported by their interpretations of the rating scales and comparisons with Bench-marks.
5. The committee arrives at a consensus for each factor and determines the most appropriate bench-mark positions to be used for substantiation of findings.
6. The chairman records the consensus and the bench-marks selected on a rating report, which is signed by each member of the committee and this determines the classification of the position.

#### Pitfalls in Rating

1. Instant Evaluation – preconceiving the group and level before studying the job description and the standards.
2. Blinkered Evaluation – allowing the status or existing classification of the job to influence your judgement.
3. Bench-mark Paralysis – insufficient reference to bench-marks throughout the rating process.
4. Job Matching – attempting to evaluate the whole job by matching with another job or a bench-mark – matching must be made on a factor by factor basis.
5. Occupational Prejudice – tendency to overrate or underrate a job because of your experience of or feelings towards a particular occupation, i.e., physical science vs social science, white collar vs blue collar, feelings about lawyers, doctors, engineers, technicians.
6. Tendency to Leniency – consistent tendency to rate high.
7. Tendency to Rate Low – failure to give recognition to the difficulties of the duties.
8. Person-Orientation – tendency to consider personal qualities of incumbent when rating the job, or to be unduly influenced by his qualifications.
9. Factor Confusion – tendency to award points under the wrong factor, e.g., continuing study and education and experience are entirely separate concepts, but are often confused.
10. Sleeping Partner Approach – accepting judgements of other members of the Committee before you are actually convinced and have stated your own case, for the sake of saving time or being agreeable. Equally undesirable is the opposite factor – inflexibility.
11. Filibuster Approach – trying to bulldoze the committee by volume of opinion rather than quality of opinion; make your points as clearly and succinctly as possible and weigh contrary opinion carefully.
12. Halo Effect – tendency to rate all factors high because one factor is high or all low because one factor is low, e.g., high on education, therefore high on complexity, consequence of error, and contacts.
13. Central Tendency – tendency to automatically assign an average or middle of the level rating to the job to avoid controversy.
14. "Sucker for Words" – tendency to be impressed by words used in the description, e.g., "negotiate", "statistics", "liaison", "directs", "co-ordinates", "confidential", "complex", without taking the trouble to find out what the words are intended to convey or to assess their accuracy and credibility.
15. Hierarchy Approach – placing excessive emphasis on organizational considerations, i.e., to the number of positions above or below in the organizational structure and their classifications in allocating degree ratings.

## Systems of Job Evaluation – Non-Quantitative Systems

### The Ranking System

The Ranking System is one by which total positions are compared and placed in order of the complexity and difficulty of the duties. Job information in the form of complete descriptions is examined, compared and placed in a ranking order. One or more levels are established for pay purposes and each job is allocated to a level.

### The Grade Description (or Classification) System

The Grade Description System is one by which the total position is compared with descriptions of a series of levels ranging from the least demanding to the most difficult work. The level descriptions specify the differences between the levels in terms of such aspects of the work as the knowledge and skills required, the complexity of the duties and the responsibilities. A position is evaluated by comparing the job description with level determinants and Bench-mark position descriptions and allocating the position to the level which best corresponds on the whole with the duties and responsibilities of the position.

## – Quantitative Systems

### Factor Comparison System

The Factor Comparison System is one by which jobs in an organization are evaluated by analyzing and comparing them, factor by factor, with the corresponding factors of a range of key jobs in the organization. The job evaluation scale consists of a series of detailed descriptions of the key jobs, which are selected to represent each major level of duties, responsibilities and skills, and ranked in ascending order of importance. Each factor of each key job is assigned a monetary value. The rater ranks each factor of the job being evaluated with the corresponding factors of the key jobs in the scale, determines which factor bears the closest resemblance and assigns the amount of money allotted to the factor of the key job. The values assigned to all factors are added to determine the rate of pay for the job.

This system has not been used for classification standards because of the difficulty in selecting key jobs to represent the tremendous variety of jobs encountered in an organization as large as the government service.

### The Point-Rating System

The Point-Rating System is one by which factors are allocated a number of points from the total of 1,000. The factors represent such aspects of the work as the knowledge and skills required, the complexity of the work and the requirement to supervise others. Each factor is divided into degrees having a number of the total points allocated to the factor.

To evaluate a position, the rater compares the job description with the factor degree definitions. He selects the degree that most closely describes the demands of the position and allots the number of points assigned to that degree. When all factors have been rated, the points allotted to each are added to determine the total point value of the position. The total number of points allotted determines the level of the position according to pre-determined level point boundaries.

### The Development of Classification Standards

Classification standards are developed by the Bureau of Classification Revision of the Treasury Board, using one of the methods of job evaluation that have been described. In practice, most classification standards are based on either the grade-description system or the point-rating system.

To develop a classification standard, information concerning the occupational group for which it is to be used is accumulated from a variety of sources, such as occupational reference manuals, interviews with occupational specialists, with supervisors and employees of departments where the occupation is represented, and from questionnaires completed by persons occupying positions that are representative of the occupation.

The information on the occupation is analyzed to determine the range of difficulty and responsibility of the jobs and the degree of diversity among them. On the basis of this analysis, the most suitable job evaluation system is selected for the standard.

If the grade-description system is selected for the standard, the number of levels which will be established must be determined and the scope and content of the grade definitions decided. The definitions are then written in terms of the differences between levels in selected characteristics of the jobs. Bench-mark positions to illustrate each grade level are selected and described. The accuracy of the bench-mark position descriptions is then confirmed with the departments in which they are located.

If the point-rating system is selected for the standard, the factors that distinguish between levels of complexity and responsibility must be determined and the degree sub-divisions of each factor chosen. Definitions of factors and degrees are written, weights are assigned to each factor and point values assigned to each degree. Bench-mark positions to illustrate the application of the factor and degree definitions are then selected and described and the accuracy of the descriptions confirmed by the departments.

When the draft standard and the bench-mark position descriptions have been printed, the staff associations and the employing departments are consulted as to their suitability for evaluating jobs in the group. After necessary amendments have been made, the standard is issued for use in evaluating the positions in the group.

When evaluation is completed, the point boundaries for the levels for point-rating plans and the level structures for grade-description plans are authorized by the Treasury Board. These structures are used as a basis for collective bargaining.

## Methods of Job Evaluation

<p style="text-align: center;"><b>NON-QUANTITATIVE</b></p> <p style="text-align: center;">(Makes comparisons between whole jobs)</p>	<p style="text-align: center;"><b>QUANTITATIVE</b></p> <p style="text-align: center;">(Makes comparisons on Factor, i.e., important job element, basis)</p>
<p style="text-align: center;"><b>RANKING<sup>1</sup></b></p> <p style="text-align: center;">Comparison with other whole jobs in an organization</p>	<p style="text-align: center;"><b>FACTOR COMPARISON</b></p> <p style="text-align: center;">Comparison with like factors of a range of key jobs</p>
<p style="text-align: center;"><b>GRADE DESCRIPTION<sup>3</sup></b></p> <p style="text-align: center;">Comparison with predetermined level descriptions</p>	<p style="text-align: center;"><b>POINT RATING<sup>2</sup></b></p> <p style="text-align: center;">Comparison with predetermined scale of factor definitions</p>

1. Utilized in Ships Officers Standards.
2. Utilized in CR Standard (Clerical and Regulatory Group), AS Standard (Administrative Services Group), PM Standard (Programme Administration Group) and many others.
3. Used in ST Standard (Secretarial, Stenographic and Typing Group), TE Standard (Telephone Operation Group), IS Standard (Information Services Group), Ships Pilots Standard (which contains only one level).

SECRETARIAL, STENOGRAPHIC,  
TYPING GROUP (ST)

CLERICAL AND REGULATORY GROUP (CR)

Point Rating/Factor Comparison Standard

Grade Description Standard

Level	9	Court Reporter						Point Range
				Level	7			841 - 1000
	8				6			711 - 840
	7				5			581 - 710
	6	Secretaries			4			451 - 580
	5				3			321 - 450
	4				2			221 - 320
	3	Stenographers			1			185 - 220
	2			Example:	Knowledge	150		
	1	Typists			Complexity	118		
					Consequence of Error	20		
					Contacts	37		
					Supervision	15		
					Total	340	CR 3	

**JOB FACTORS AND ELEMENTS  
USED IN SOME GROUP STANDARDS**

**Clerical and Regulatory Group, Administrative Support Category**

FACTOR	ELEMENT
Knowledge	Experience
Complexity	Education
Consequence of Error	Guidelines
Responsibility for Contacts	Variety
Supervision	Purpose of Contact
	Persons Contacted
	Frequency of Contacts
	Nature of Supervisory Responsibility
	Number of Employees Supervised

**Administrative Services Group, Administrative and Foreign Service Category**

FACTOR	ELEMENT
Knowledge	Education
Decision Making	Experience
Responsibility for Contacts	Continuing Study
Supervision	Scope for Decisions
	Impact of Decisions
	Nature of Contacts
	Persons Contracted
	Numbers Supervised
	Level of Employees Supervised

**General Services Group, Operational Category**

FACTOR	ELEMENT
Skill and Knowledge	Basic Knowledge
Effort	Comprehension and Judgment
Responsibility	Specific Vocational Training
Working Conditions	Mental Effort
	Physical Effort
	Resources or Services
	Safety of Others
	Environment
	Hazards

**Electronics Group, Technical Category**

FACTOR	ELEMENT
Skill and Knowledge	Scope for Initiative and Judgment
Technical Responsibility	Impact of Action Taken
Responsibility for Contacts	Purpose and Nature of Contacts
Conditions of Work	Persons Contacted
Supervision	Mental Effort
	Physical Effort
	Environment
	Nature of Supervisory Responsibility
	Number of Employees Supervised.


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