

# MANAGEMENT DIRECTIVE

## Commonwealth of Pennsylvania Governor's Office

<b>Subject:</b> Development and Validation of Job Standards	<b>Number:</b> 520.7 Amended
<b>Date:</b>  June 12, 2012	<b>By Direction of:</b>  Kelly Powell Logan, Secretary of Administration
<b>Contact Agency:</b> Office of Administration, Office for Human Resources Management, Bureau of Classification and Compensation, Telephone 717.787.8838	

**This directive establishes policy, responsibilities, and procedures for agencies to submit documentation of occupational studies when submitting new or revised proposed job specifications for review by the Office of Administration, Office for Human Resources Management, Bureau of Classification and Compensation (BOCC), and ultimate adoption into the commonwealth's Classification and Compensation Plan. Marginal dots are excluded due to major changes.**

- 1. PURPOSE.** To establish policy, responsibilities, and procedures for uniformly collecting and documenting information about commonwealth work assignments that will be utilized by BOCC to develop job standards and by agencies and the State Civil Service Commission (SCSC) to develop recruitment and selection systems.
- 2. SCOPE.** This directive applies to all agencies under the Governor's jurisdiction that draft new or propose revisions to existing job standards.
- 3. OBJECTIVE.** To ensure that information in job standards is job related and that the job relatedness is demonstrable.
- 4. DEFINITIONS.**
  - a. Conditions of Employment.** The part of a job standard that lists any license, certification, or other position requirement needed at the start of employment.

- b. Duty/Task Statement.** Statements that illustrate the type of work commonly assigned to positions in a specific occupational or program area. Also known as a work behavior statement.
- c. Employee Organization.** A union or representative of employees that is certified by the Pennsylvania Labor Relations Board to act as an exclusive representative for purposes of collective bargaining, meet and discuss, and contract interpretation issues, including classification grievance proceedings, for commonwealth employees in designated bargaining units.
- d. Examples of Work.** The part of a job standard that provides illustrative statements of work performed as part of one or more positions that are representative of work normally found at the level described in the job definition.
- e. Job Code.** A numeric or alpha numeric code used to identify the job involved in employee, applicant, and payroll transactions.
- f. Job Definition.** The part of a job standard that describes the work, identifies factors to be used in the allocation of positions to that job, and outlines the essential leveling criteria for the job. This includes such factors as the difficulty, complexity, variety, and scope of the work and the supervisory and nonsupervisory responsibilities for performing the work. Classification analysts use the job definition to make position classification determinations.
- g. Job Analysis.** A systematic process of collecting, processing, analyzing, interpreting, and documenting data about work and the requirements to perform that work for the proposed development or revision of job standards.
- h. Job Standard.** A written description of the duties and responsibilities, allocation standards, and applicant screening standards for a group of substantially similar positions. Job standards are commonly referred to as job specifications.
- i. Job Title.** The approved title of a job as included in the commonwealth's Classification and Compensation Plan. It shall be used on all human resource and payroll records and actions, but need not be used for internal administration.
- j. Minimum Experience and Training.** The part of a job standard that lists the education and experience required of an applicant upon entry into the job.
- k. Necessary Special Requirements.** The part of a job standard that lists any license, certification, or other position requirement needed at the time of application, by law or funding sources, of individuals performing the work.
- l. Post Employment Requirements.** The part of a job standard that lists any license, certification, or other position requirement needed for continued employment, but not before employment begins.

**m. Required Knowledges, Skills, and Abilities.** The part of a job standard that sets forth the knowledges, skills, and abilities that are required of applicants for that job prior to employment, and that have been determined necessary for successful job performance.

**n. Subject Matter Expert.** A person who has direct and current knowledge of the duties, responsibilities, and requirements of a job being studied. Normally, this will be an incumbent or immediate supervisor.

**5. POLICY.** Job analysis must be conducted before new job standards or revisions to existing job standards will be considered by the BOCC. All sections of the job standards, including the description of the duties and the qualifications of individuals to perform those duties, must be the result of a job analysis.

## **6. RESPONSIBILITIES.**

**a. The Executive Board** is responsible for standardizing the qualifications for employment, and all titles, salaries, and wages including establishing different standards for different kinds, grades, and classes of similar work or service. (*Section 709(a) of The Administrative Code of 1929, 71 P.S. § 249(a).*)

**b. The Secretary of Administration** is responsible for recommending to the Executive Board amendments to the commonwealth's Classification and Compensation Plan to reflect changes in the nature, scope, kind, or level of work. (Refer to *Management Directive 505.7, Personnel Rules.*)

**c. Bureau of Classification and Compensation** is responsible for conducting all staff work in the preparation of the amendments to the commonwealth's Classification and Compensation Plan and reviewing the classification of all positions to ensure that job classifications are administered in accordance with the standards adopted by the Executive Board. It will also provide, in conjunction with SCSC, training and procedural guidance on conducting job analysis studies.

**d. State Civil Service Commission** is responsible for conducting applicant assessment processes for classified service positions and ensuring that these processes are job related and conform to current standards for validity.

**e. Agency Heads** are responsible for assigning duties and responsibilities to positions, ensuring that job standards applied to positions under their direction are accurate, and for reporting and recommending appropriate changes to the Secretary of Administration for those job standards that are no longer appropriate.

## **7. PROCEDURES.**

### **a. Determination of Need for Job Analysis.**

**(1)** An agency, BOCC, or SCSC will make a preliminary determination that a job analysis is needed because an existing job standard is no longer appropriate or a new job standard is necessary. This decision is normally based upon:

- (a) Management direction or organizational changes that have changed the nature of work and responsibilities.
  - (b) Labor relations considerations that have changed the appropriateness of work organization or description.
  - (c) Existing job or applicant evaluation standards that are inaccurate or inadequate.
  - (d) Technological changes that have outdated the job standard.
- (2) Agencies will notify BOCC of job analysis studies they are undertaking and provide estimated completion dates. BOCC will notify SCSC of studies that are likely to impact on classified service recruitment or assessment programs.
- b. If it is determined that a job analysis will be conducted, agency personnel conducting the study shall:
  - (1) Determine sources of job information (i.e., incumbents, supervisors, and other experts) and select a sample of sources from whom data will be collected. The sample should be large enough to be representative of the significant characteristics of the work force (i.e., field vs. central office assignment, metropolitan vs. rural assignment, etc.). The sample should be large enough to ensure complete information about the job.
  - (2) Gather job information from incumbents, supervisors, and other appropriate subject matter experts.
  - (3) Write duty/task statements that accurately describe the work performed.
  - (4) Determine the relative importance of duty/task statements for each job or jobs in a series.
  - (5) Define levels of work and allocation factors.
  - (6) Derive knowledges, skills, and abilities from the duty/task statements.
  - (7) Determine the relative importance of knowledges, skills, and abilities; identify entry-level knowledges, skills, and abilities; and identify requirements that can be used for ranking.
  - (8) Derive minimum experience and training requirements from important entry-level knowledges, skills, and abilities.
  - (9) Verify that the information accurately describes the job and its requirements by having subject matter experts review the results of steps (3) through (8).
  - (10) Complete the documentation process, including a report summarizing the job analysis and a written draft of a new job standard(s).

- c. Upon completion of the job analysis study, the new job standard with documentation should be:
- (1) Reviewed for completeness and accuracy by agency management in the program area being studied.
  - (2) Reviewed by agency top management and then submitted to BOCC.
  - (3) Reviewed by BOCC; and through BOCC, discussed with other affected agencies and then SCSC, if applicable, for completeness and accuracy.
  - (4) Reviewed by appropriate employee organizations, if applicable, as required by existing collective bargaining agreements.
  - (5) Transmitted to the Executive Board for final approval and adoption into the commonwealth's Classification and Compensation Plan.

**This directive replaces, in its entirety, *Management Directive 520.7*, dated October 16, 2006.**