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POSITION QUESTIONNAIRE WRITING GUIDE

Labour Relations and Compensation Analysis

Health Association Nova Scotia

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# Preface

The collection of accurate, complete, up-to-date job information is essential to, and forms the basis of the job evaluation process. Its importance cannot be overstated. It is the information from which job content is analysed and job value is determined. This *Guide* has been developed to provide assistance in completing the *Position Questionnaire,* (Appendix A), providing instructions for completing each section.

The *Position Questionnaire*, (Appendix A), is designed to describe the position, capture the skill, effort and responsibility normally required in the work, and to record the conditions under which it is usually carried out. The *Position Questionnaire* focuses on **current** job content and requirements. It does not include any activities that are outside of the normal job duties such as volunteering for committee work.

The *Position Questionnaire* is designed to obtain information on the different aspects of the job you occupy. The person doing the job and the immediate supervisor are in the best position to describe what the job is all about. Please keep in mind that, although you are the employee(s) doing the job, what is being described are the current responsibilities of the job, **not how well you are performing these tasks and responsibilities**. It is important that you concentrate only on providing the facts about the job and its responsibilities. **This is not an appraisal of your performance on the job.**

The *Questionnaire* includes two main types of information:

* Context Setting (i.e., reporting relationship, placement in the organizational structure, job identification)
* Information to support evaluating relative value of each compensable factor (know how, problem solving, accountability, working conditions)

# The Position Description - Benefits

A *Position Description* provides information on the added value of a position to the organization. A good job description is an excellent tool of communication between a manager and his/her direct reports to manage expectations. When a position is described based on the objectives and expectations of the organization, a logical relationship is created between the position and how it contributes to the goals of the organization.

The *Position Description* is an important element of the job evaluation process. It provides evaluators with an understanding of the essence or “raison d'être“(reason for being) of a position.

The description should define the objectives and purpose of the position rather than presenting a list of duties or minute details of how activities are completed and/or tasks accomplished. These objectives are highlighted against the environment in which the position exists and from which the challenges evolve for the incumbent. The completion of a position description is not an exercise in creative writing. It is an exercise where employees are being asked to describe their job in a factual and accurate manner. The “what is being said” is more important than “how you do it”.

There are other benefits to you personally that a good description can provide.

The description establishes and clarifies what you are paid to accomplish. It is a basis of agreement between you and your superior about work goals and objectives. It is a means of communication for improved work planning and feedback. It gives to a reader, who may or may not be familiar with your position, a clear and understandable picture of the job's nature and scope. While typically, the *Position Description* has been created for the basis of salary determination, it supports all human resource management activities such as:

* Organizational Design
* Workforce Analyses
* Team Building
* Succession Planning
* Recruitment
* Performance Management
* Career Development
* Orientation

When you have completed writing your position description, you may discover, as many have, that you've acquired a fresh appreciation of your role within the organization.

# What Is Job Evaluation?

Job Evaluation provides a method by which an organization can determine the internal ranking of all positions. It is a method of establishing a hierarchy of jobs within an organization based on job content and requirements. All organizations, regardless of size use some form of job evaluation, formal or informal to establish relativities and determine job value.

The HAY Job Evaluation System measures elements which are inherent in all jobs to varying degrees and provides a clear, understandable and systemic basis for defining and comparing the requirements for all kinds of jobs at all levels. It compares positions based on four main factors: Know How, Problem Solving, Accountability and Working Conditions.

## *Know How*

Measures the total of every kind of knowledge and skill however acquired, needed for acceptable job performance. It considers practical procedures and knowledge, specialized techniques and learned skills. It also considers planning, coordinating, directing or controlling activities and resources associated with an organizational unit or function. Human Relations skills or active practicing person to person skills in the area of human relationships are also considered within this factor.

## *Problem Solving*

Measures the thinking required on the job in the form of analyzing, reasoning, evaluating, creating, using judgment, forming hypothesis, drawing inferences, and arriving at conclusions by considering the environment in which the thinking takes place and the challenge presented by the thinking to be done.

## *Accountability*

Measures the relative degree to which the job when performed competently can affect the end results of the organization or a unit within the organization. It considers the nature and degree of decision making or influence of the job, unit or function most clearly affected by the job, and the nature of that affect. It is important to include the overall size of area managed or supervised and/or programs impacted by the job. For example, the number of employees supervised, number of staff directly receiving support, number of clients seen on an annual basis, square footage of physical facilities, population served for program delivery, budget and the value of purchases the incumbent can make.

## *Working Conditions*

Measures the conditions under which the position responsibilities take place including, physical effort, physical environment, sensory attention and mental stress. It considers the frequency and duration.

Positions are evaluated by evaluators with expert knowledge in the application of the job evaluation system to a wide range of positions across a broad spectrum of organizations within and outside the healthcare sector.

# Steps to Follow

The *Position Questionnaire* will help you arrange your information in a logical and sequential manner; much like a financial statement presents information in a standard format. This in turn will facilitate the interpretation of the information.

After you assemble the information and record it in the form requested, you will have a clear and concise statement about your job that communicates both the scope and functions of what you do and its effect on the district, organization, department, division, unit, etc.

Before embarking on the steps necessary to finalize your *Position Questionnaire*, you should read through this *Guide* in its entirety. This should provide you with a "flavour” of a *Position Questionnaire* and the type of information to be included.

* Please read the Guide and Position Questionnaire carefully, before completing each section.
* Attach additional pages if necessary. If extra space is needed to respond to a question, indicate that the response is "continued", and attach an additional page with the question number clearly identified.
* If you find that some questions do not relate to this job indicate “not applicable”. If you ignore a section the evaluators may not know if you just missed it or if you meant not to comment. By indicating N/A it will be clear that you have made a conscious decision that it is not applicable.
* Only include information related to the job content as it currently exists. When reviewing your duties and responsibilities, ensure that you consider the entire job cycle, e.g. activities that regularly occur in a one-year period.
* Include enough information so that anyone not familiar with the job can get a clear idea of what is involved.
* It is important that the "whole job" be represented, not just a particular dimension or a special project.
* When using abbreviations, acronyms or technical terminology, explain their meaning.
* Once you have completed the Position Questionnaire, forward it to your immediate supervisor for review and signature. Please ensure that you and your supervisor sign where appropriate.
* Supervisors/Managers should review the Questionnaire to ensure that the information provided serves as a fair representation of the job.

# Getting Started – Completing the Questionnaire

# Job Identification

This Section gathers basic identification information for tracking and retrieval.

INCLUDE:

* Name of the Organization
* Title commonly used for the job.
* Program or Activity area where the job exists
* Date

# SECTION I: Reporting relationships

This section helps to locate the position within the organization. Please include who you report to, who reports to you and anyone you support while carrying out your responsibilities on a day to day basis. Please include a one to two sentence description for each position you supervise.

Question 1(b) captures information on those in your work unit that you support other that the person to whom you report.

EXAMPLES:

* An administrative assistant in a department may report to the manager but, may also, as the only administrative support person in the office, provide support and assistance to other staff in the office.
* If you report to a manager but also support other managers because of the nature of your work please include this information. For example, the accountant may report to the executive director but may support all other program managers with financial issues.

# SECTION II: Education and Experience

This section considers the minimum level of completed formal education and relevant experience required for the job. Relevant experience may include previous job related experience and/or on the job learning or adjustment.

CONSIDER:

* If a new person were hired into this job, what would be the **minimum** level of completed schooling or formal training required based on today’s education levels and standards. The requirements listed here may be different than your personal level of education.
* Some jobs require Provincial, National or Professional certification. Include any certification that is **mandatory** for the job.
* Specify if any special skills, training or licenses are needed to perform the job.
* Think about how long it would take for someone to **learn** how to do the job, starting with the education level and/or specific training outlined above.
* Some jobs may require previous related job experience, some require time on the job to learn and/or adjust to the job and some require both.
* Is previous related job experience necessary? If so, how much? Describe the nature and type of experience required to prepare for the job.
* Is time on the job required to learn new tasks and responsibilities or to adjust to the job? If so, how much?

# SECTION III: Nature and Scope of Position

CONSIDER:

* Think about what you would say if someone approached you and asked you about your job.
* Provide a brief statement describing the general overall purpose of the job.

EXAMPLES:

* This job reviews contracts and proposals to ensure compliance with policies, rates and regulations. Responsible to analyse contracts and liaise with various departments to detect inaccuracies, omissions of key terminology and possible legal implications.
* This job receives and/or initiates telephone calls of a routine nature from/to customers or prospective customers regarding company products or services. Responsible to handle inquiries, resolve problems and promote/sell products*.*
* It may be helpful to complete the rest of the document before completing Section III.

## QUESTION 5: Responsibilities

CONSIDER:

* Most jobs can be described in five to seven key work responsibilities. Summarize each key work element section by a phrase, and estimate the percentage of time per year spent on each.
* For example: one day every week per year equals 20%, five weeks per year equals 10%.
* Responsibilities should be listed in order of time spent.
* Then provide in bullet form details or examples of the duties/responsibilities that are performed within each responsibility. Remember to include activities that occur at periodic times throughout the year.

EXAMPLES:

Human Resources Management

* Allocate staff to service areas based on service utilization and workload
* Provide for clinical supervision, coaching and conflict resolution for all staff
* Oversee effective recruitment, orientation and staff development to ensure the availability of competent resources to meet program needs

Office Administration

* Provide receptionist service for the facility
* Ensure office supplies are available when required
* Troubleshoot office equipment and fix or call repair person as required

* Don't get lost in detail in describing the duties and responsibilities. Use clear verbs about things that are done in connection with each one.
* It is important that the whole job be described, not just a particular dimension or a special project.
* If using abbreviations, acronyms or technical terminology, please explain their meaning.

## QUESTION 6: Contacts

The purpose of this section is to provide detail on the nature and extent of the contacts. In some instances the purpose of the contact you would have with the particular individual, department or organization may be evident from the rest of the document and the work you do. Do not include contact with the individuals you supervise.

## QUESTION 7: Difficult and Challenging Aspects

The purpose of Question 7(a) is to identify, through examples, the situations that make your work difficult.

EXAMPLES:

* The lack of information systems makes decision making more difficult as tracking and recording of information is much more time consuming.
* With multi-tasking and constant interruptions there is a continuous need to modify priorities and lack of control over work pace and task completion.

The purpose of Question 7(b) is to gather information related to the requirement for problem solving and fresh thinking in your job.

EXAMPLE:

* With ever increasing demands for service and limited resources, I am constantly challenged to find new ways of delivering services or partnering with others to achieve a particular end result.

# SECTION IV: Decision Making

This Section gathers information on the situations requiring decision making and the degree of independence.

CONSIDER:

* Include the types of decisions you can make on your own, the types of decisions you make on your own but use your judgment to determine whether or not to inform your supervisor, and the types of things you must go to your supervisor for before you take action.
* Include in Question 8(d) information on how you are expected to apply your knowledge and skills to provide analysis and reasoning to develop recommendations with respect to a specific incident or with respect to process, system, operational, organizational or service delivery improvements.
* Please provide examples for your answers.

## QUESTION 9: End Results

All jobs exist to accomplish something. These are the key end results or specific accountabilities.

CONSIDER:

* List accountability statements in order of importance as you see them.
* Most jobs have three to seven major elements or accountabilities.
* Do not include activities or duties, but rather, statements of what the job is intended to accomplish.

EXAMPLES:

* Ensure all mechanical devices and physical structures operate smoothly and efficiently by coordinating regular inspection, repair and maintenance of the plant.
* Provide tasty, nourishing and varied meals by developing and implementing menu plans.
* Ensures that all employees are aware of occupational health and safety requirements through the development and delivery of education and promotion programs.
* Assists in the preparation of realistic plans and budgets by providing accurate costing data and advice in a timely manner.

## QUESTION 10: Dimensions

This question considers the degree to which the job (when performed competently) can affect the end results of the organization or a unit within the organization. This question often poses some difficulty for certain types of positions. It is normally easy for an individual in a management or supervisory position to be able to indicate the number of people they supervise and the size of the budget they manage.

It is sometimes more difficult for an individual in an Administrative Support position to see and appreciate where he/she is directly impacting on a program or activity. Certainly if one is an Administrative Assistant to the Manager of Social Work and that Department, the Assistant has an impact on that program area. The more support this individual is able to provide to his/her professional colleagues, the more time they will have to dedicate to the professional/counseling elements of their jobs. Also if you are a Payroll Officer, you do not supervise employees but you have an impact on all employees by ensuring payroll is completed accurately and on time.

CONSIDER:

* When attempting to capture this information try and consider who would do the work you are doing if you weren’t there. Also, even if others had to perform the functions you are carrying out, what elements of the program would suffer because these others were doing your work instead of other work on which they are now able to concentrate their time.
* When completing this question consider “the ripple effect” which is sometimes demonstrated by the example of throwing a rock into the water. It is very easy to see where the rock splashed into the water and the impact the rock had at that point. One needs to take some time though and observe just how far the ripple goes and where else it might impact. This is often the case in trying to determine the full impact and scope of a position.
* Some things we would expect to see referenced here are:
* # of Employees Supervised
* # of Staff directly receiving your support
* # of clients seen on an annual basis
* # number of meals served
* Square footage of physical facilities
* Number of counseling/education sessions put on over a year and number of participants
* # of committees being coordinated, number of people that need to be coordinated, frequency of meeting
* Geographic area for program delivery
* Population served by activity or program
* Budget
* Value of purchases the incumbent can make

## QUESTION 11: Similar Positions

In this question include information, if applicable, on whether a similar position(s) exist within the organization as this will assist with identifying comparisons and relativities. Include information in terms of other similar positions in the organization which you deem are particularly relevant to your position. This may include looking for positions with the same title or other positions with a different title but similar responsibilities, it is also appropriate to comment on these.

## QUESTION 12: Additional Comments

If applicable, indicate any unique or specific elements of your job that have not been captured through the *Questionnaire*. Anything considered relevant and appropriate can be provided under this question.

# SECTION V: Working Conditions

This Section considers the progressive degrees of exposure to unavoidable physical and environment factors which increase the risk of accident, ill-health, or physical discomfort.

CONSIDER:

* From the lists below choose the physical effort, physical environment, and sensory demands that occur in this job that give rise to fatigue or strain
* For each applicable example, indicate the normal duration of this demand over a normal work day or shift and check whether they occur occasionally, regularly, frequently or on an extended basis (excluding breaks). Exertions that are infrequent or that are not typical of the performance of the job should not be considered. Please use the information below to measure frequency:

|  |  |
| --- | --- |
| **Measurement** | **Definition** |
| Occasional | Activity occurs on a daily basis or several times daily, but not every day or approximately up to 25% of the time |
| Regular | Activity occurs several times daily, almost every day or approximately 50% of the time |
| Frequent | Activity occurs several times daily, almost every day or approximately 75% of the time |
| Extended | Activity is continuous, almost every day, requiring continuous effort causing major fatigue – over 75% of the time |

* Include any examples of precautions undertaken or protective clothing/apparatus required to be worn in this job.

## QUESTION 13(1): Physical Effort

|  |  |
| --- | --- |
| * Climbing
 | * Repetitive motion
 |
| * Coordination of fine or course movements
 | * Sitting
 |
| * Crouching
 | * Standing
 |
| * Driving
 | * Stretching/reaching
 |
| * Keyboarding
 | * Walking
 |
| * Lifting
 | * Working in awkward positions
 |
| * Maintaining one position
 | * Working in confined spaces
 |
| * Pulling
 | * Others (please specify)
 |
| * Pushing
 |  |

EXAMPLES:

* Keyboarding required on a regular basis to complete and generate financial reports and correspondence.
* Regular periods of lifting while helping residents in and out of tubs, chairs, beds and vehicles when being transported to outings or appointments.

## QUESTION 13(2): Physical Environment

|  |  |
| --- | --- |
| * Chemical substances (specify)
 | * Moisture
 |
| * Cold
 | * Multiple deadlines
 |
| * Dust
 | * Noise
 |
| * Foul language
 | * Odour
 |
| * Grease and/or oil
 | * Second hand smoke
 |
| * Heat
 | * Steam
 |
| * Inadequate lighting
 | * Travel
 |
| * Inadequate ventilation
 | * Vibration
 |
| * Interruptions
 | * Other (specify)
 |
| * Isolation
 | Sharp objects |
| * Chemical substances (specify)
 | * Excessive/unpredictable weights
 |
| * Extreme Noise
 | * Personal safety risk
 |

## QUESTION 13(3): Sensory Demands

|  |  |
| --- | --- |
| * Active listening
 | * Preparation of written/electronic materials
 |
| * Concentration on precision work
 | * Proofreading
 |
| * Counseling
 | * Provide training, instruction
 |
| * Data entry
 | * Report writing
 |
| * Driving
 | * Use of computer software
 |
| * Interviewing
 | * Viewing equipment/instruments
 |
| * Making presentations
 | * Multiple or other (please specify)
 |
| * Observing people
 |  |

## QUESTION 13(4): Mental Stress

This question considers any element of your position which requires you to be subject to emotionally disturbing circumstances or disruption of lifestyle caused by work schedules or being away for extended periods or time or lack of control over work space.

# Signatures:

INSTRUCTIONS:

* After completing the Questionnaire, please sign and forward to your immediate Supervisor(s).
* Your supervisor should review all sections of the completed Questionnaire thoroughly. It is important that the information provided serves as a fair representation of the job
* Once the Supervisor, is satisfied that the information submitted is reflective of the job content, they must sign the Questionnaire. Additional discussion between you and your supervisor may be required to reach consensus on job content and requirements it reflects the expectations and requirements of the organization.
* Completed Questionnaires are to be forwarded to the coordinating official (Human Resources/People Department) within your organization and after their review, forwarded as a package to Health Association Nova Scotia.

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# Attachment:

## APPENDIX A: Position Questionnaire