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ABSTRACT

This document provides guidelines for conducting job analyses and writing job descriptions. It covers the following topics: the rationale for job descriptions, the terminology of job descriptions, who should write job descriptions, getting the information to write job descriptions, preparing for staff interviews, conducting interviews, writing the job descriptions, supplementary information for various uses of job descriptions, checking job descriptions, and keeping job descriptions up to date. The guide includes four appendixes: (1) active verbs for use in job descriptions; (2) sample person specification sheet for job descriptions; (3) interviewer's checklist for job analysis; and (4) a model job description. (KC)

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Mendip Papers

Job analysis and the preparation of job descriptions

Bob Saunders

MP 037

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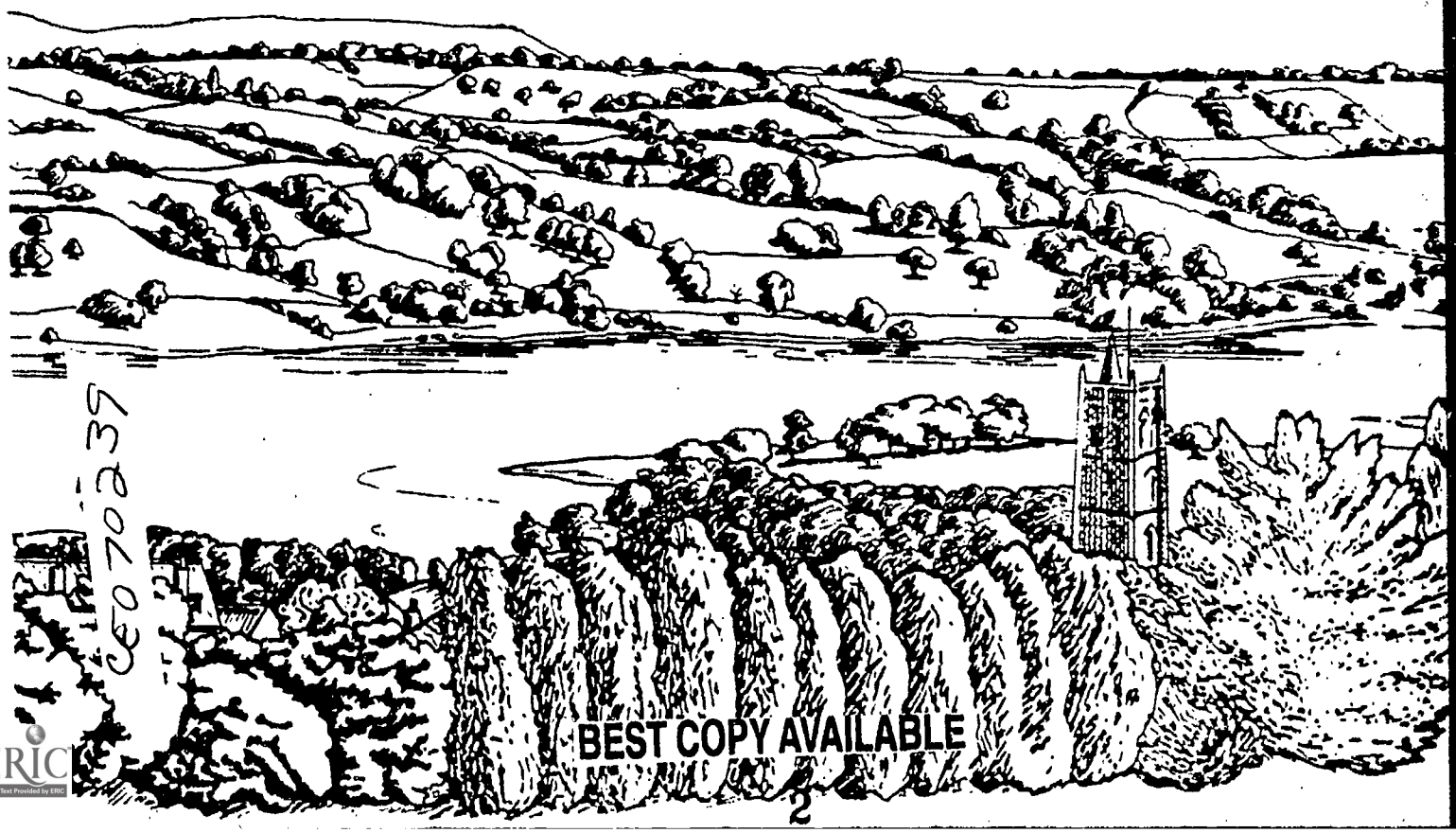

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From university, Bob went into industry as a sales office management trainee. He then spent five years in work study and O&M, culminating as head of work study in a factory producing photographic film. Bob then spent two years in personnel as group training manager before moving to training engineering employees which he spent 15 years doing. After this he moved to become firstly a deputy principal and then a principal lecturer in management. He joined The Staff College in 1988.

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Job analysis and the preparation of job descriptions

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Introduction

Well written, up-to-date job descriptions are a valuable aid to most aspects of personnel management. In particular, they provide basic information needed to undertake the following activities:

- planning future staff requirements ;
- redesigning and developing jobs;
- informing the creation of employee specifications;
- briefing interviewers and interviewees;
- grading jobs and deciding pay levels;
- providing terms of reference;
- planning induction programmes;
- analysing staff development and training needs;
- undertaking performance appraisal;
- career counselling;
- handling transfers and promotions;
- analysing potential health and safety risks;
- reviewing organisational structures;
- supporting, and if necessary defending in tribunals, dismissals for indiscipline or incapability.

To be useful a job description must be complete, concise and current. No important aspect of the job must be omitted, but it must be described accurately and succinctly, without padding or verbosity.

Depending on what the job description is being used for, different detailed information may need to be included, but duplication of effort can be avoided if a simple core job description is written to which supplementary information can be added as required.

A job description must not be allowed to hamper or control the natural development of a job. It should be regarded as a 'snapshot' of the job at the date of analysis, which will need regular updating as the job changes. Job descriptions should be checked and revised each time they are used, as well as being reviewed and, if necessary, updated at the annual staff appraisal interview.

Terminology

In most dictionaries, the words job, task, post and occupation are interchangeable – in job analysis they have specific meanings. The following is a definition of the terms used in this paper.

Job analysis

The process of collecting and analysing information about the tasks, responsibilities and context of jobs.

Job description

A written statement of the content and requirements of a job, produced by job analysis.

Task

A piece of work undertaken to achieve specific end results.

Job

The collection of tasks which makes up the work of an individual. (If two or more individuals undertake an identical collection of tasks, they are doing the same job.)

Post

One individual's place in the organisation. (If five people are employed to do the same collection of tasks, there is one job but five posts.)

Occupation

A profession, trade or vocation. A type of work, for example lecturer, clerk or accountant.

Employee specification

An analysis of the attributes an individual would need to fulfil the requirements of a job.

The interrelationship of some of these terms is illustrated in **Figure 1**.

Who writes job descriptions?

It is a useful learning experience for members of staff, after suitable training, to write their own job descriptions, as it encourages them to reflect upon the nature and priorities of their roles.

However, the more people who are involved in the job analysis programme, the more difficult it becomes to achieve consistency in the format and style of job descriptions. Although this may be unimportant for some of the uses to which the descriptions will be put, for any use where comparison between jobs is a feature, consistency is vital.

Where job descriptions are to be used to decide salary differentials by job evaluation, the job analysis should be carried out by impartial analysts to avoid any bias in the results.

Getting the information

If anyone other than the post-holder writes the description, they will first have to gather the necessary information. Even a head of department or support staff supervisor is unlikely to know the job of an immediate subordinate well enough to write a job description without considerable discussion with the post-holder.

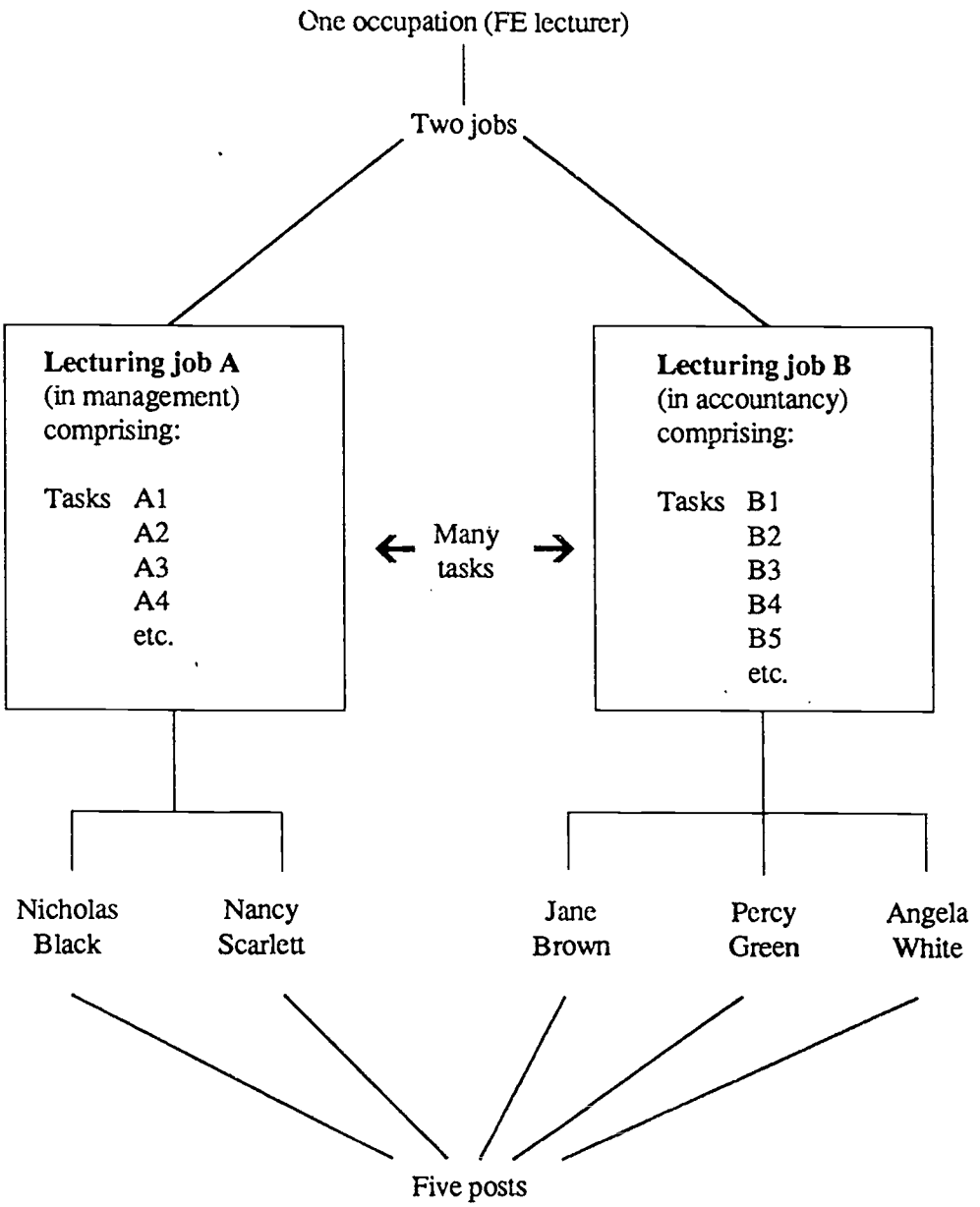
Personal observation, team discussions and questionnaires can be useful ways of gaining information, but in almost all cases it will be necessary to interview the post-holder and his or her line manager to obtain all the necessary information.

Preparing for an interview

Care must be taken to ensure that proper communication takes place before interviewing starts. Staff will need to be given a basic understanding of what job analysis involves, and of the purpose to which the job description will be put.

It is good practice to arrange interviews in advance, so that minimum inconvenience is caused to the post-holder.

Figure 1: What is a job?



Before the interview the job analyst should study all the available job information. This may consist of a questionnaire, a list of major tasks supplied by the manager or an old job description. It is also useful to check the position of the job in the organisational structure. It should be remembered, however, that the organisational structure is sometimes based as much on existing pay rates as on the actual lines of reporting and communication.

Care should be taken to arrange the right environment for the interview, preferably a quiet room away from the working environment and the distractions of the office environment. Interviewees should not be asked to look into a bright light, or to look up to their interviewer, and the use of a table as a barrier should be avoided. Such points are important if the rapport necessary for a successful interview is to be achieved and sustained.

Interviewing

The post-holder must be satisfied with the interview if the resulting job description is to have any credibility. The analyst must ensure that the post-holder really understands the purpose of the interview and its resulting job description. A rapport should be built up with the interviewee and analysts must show that during the interview they are completely absorbed in the study of the job, to the exclusion of other interests.

In the ideal interview 70 per cent of the talking is done by the information giver, and only 30 per cent by the interviewer, but everything said is relevant and factual. In practice, it is difficult to achieve the right balance between control of the interview to ensure relevance, and allowing the post-holder sufficient freedom to talk to ensure that all the information is obtained. Control can only be maintained if the interview is broadly planned beforehand; for example, the first 15 - 20 minutes could be spent establishing the major tasks of the job, and the job purpose can then be discussed, before each major task in turn is separated out for detailed discussion. This detailed discussion will normally concentrate on clarifying the job activities involved but it may also throw light on the performance requirements of the task. These two categories of information should be recorded separately, to make the later writing of the job description easier.

Open ended questions are useful in encouraging someone to talk and in promoting thought-out replies, whereas leading questions may provoke misleading answers. Unless the post-holder is verbose and straying into irrelevances, it is not a good idea to interrupt, as this may stop the flow of information.

Before anything is recorded, analysts should be sure that they have understood exactly and precisely what has been said. They should continue to explore a given subject until this certainty is achieved, and then cross-check by summarising the information before moving on.

Writing the job description

Most job descriptions will answer the following questions. This is the 'job analysis formula'.

- Why does this job exist?
- What is done by the job holder?
- How is it done?
- What is involved in doing it?

A wide range of different job description formats are in use in different organisations but the one you choose should make both writing and later use as easy as possible.

The format suggested here is simple enough to be universal, and job descriptions written in this form can be readily adapted for use in recruitment, training needs analysis, organisational analysis and other personnel functions, by the addition of supplementary analyses.

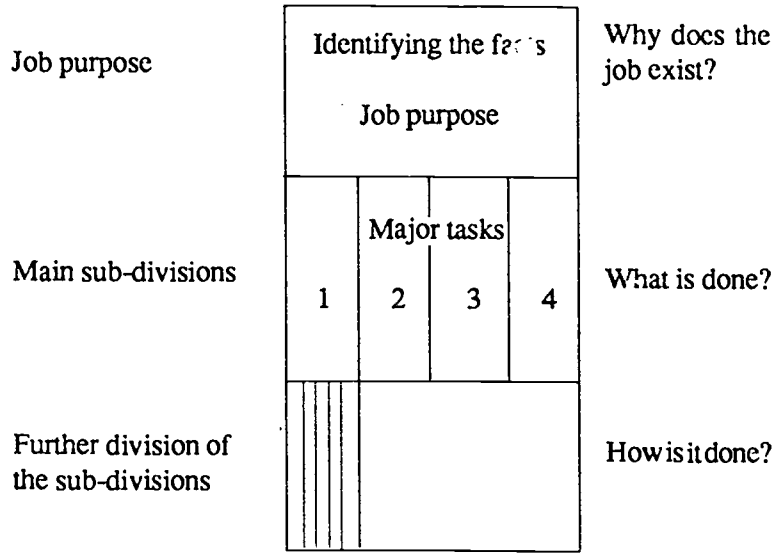
This format is illustrated in **Figure 2**.

The main sections of the job analysis formula are :

- to identify the facts;
- the job purpose;
- the major tasks;
- the job activities.

The identifying facts, job purpose, major tasks and job activities sections describe why the job exists, what is accomplished and how it is done. The fifth section briefly summarises some generally useful information about what is involved in doing the job.

Figure 2: The framework of a job description



This core description is supplemented by various analyses of job demands for different purposes, for example:

- job information sheet or employee specification for recruitment purposes;
- training needs analysis for staff development (what is involved in doing this job?);
- performance requirements for job evaluation;
- performance criteria.

Identifying the facts

This involves specifying the job title, the section, the department, the number of people currently employed in the job and the date on which it was analysed. A reference number may also be useful, as may the name of the analyst. The name of the post-holder should not appear on the final version of the description, as it may encourage users of the job description to think of the person currently holding the post rather than the job itself.

Job purpose

The job purpose should define, in one simple phrase, why the role exists. What is the basic reason for having this particular job as a separate role in the organisation?

Major tasks

The major tasks describe each broad area of work in the job which is different in kind from the rest (and therefore makes its own individual demands) in one simple sentence. A manager may, for instance, control and supervise subordinates, report to a senior manager, handle the more serious problems with students, personally carry out analyses of performance in specific areas, and plan the department's future policy and methods of operations. Each of these areas of work requires a separate major task. The major tasks between them should cover the whole job.

Each major task should start with an active verb ending in 's', for example, 'Reports verbally to the

principal once a week'. This enables users of the job description to scan the opening words of the major tasks and remind themselves immediately of the nature of the work carried out. The more precise the verb, the more clearly the actions taken by the post-holder are specified.

Each major task may then be broken down into a series of job activities by asking 'How is this major task carried out?' The answer will be a series of simple sentences, frequently in chronological order, each describing an activity. It is convenient to link job activities to the major task to which they refer by using a decimal numbering system, for example, '2.3 is the third activity involved in carrying out major task 2'.

Job activities

Job activities should again start with active verbs ending in 's'. It is essential that the verbs should be chosen with care, to give as precise a picture as possible of what the post-holder does. 'Is responsible for' is typical of a phrase so imprecise as to be valueless. Verbs such as issues, writes, analyses or telephones, give a clear picture of what the job entails. (See Appendix 1 for further suggestions.)

Supplementary information for different uses of the job description

The use to which the job description is put will determine the supplementary information required. For recruitment and selection, for example, a job information sheet and person specification will be required. The job information sheet contains the sort of current data needed to answer candidates' questions at interview.

A commonly used format for this job information is shown in **Figure 3.**

Figure 3: Job information sheet

Responsibilities	for managing people, for finance/budgets/spending, for equipment and materials, for making changes.
Relationships	to whom does the post-holder report? other main relationships in the institution.
Physical and economic conditions	office accommodation, working conditions, conditions of service, salary grading.
Social conditions	social contacts required by the job.
Prospects	

It should be remembered that this information could be interpreted as forming part of the contract of employment of the job holder. It should be factual and should not imply employee benefits which might prove difficult to sustain in practice.

Person specification

A person specification (or person profile) analyses the attributes required by an individual to succeed in the job. It is an important document in that it defines the selection criteria before the shortlisting or assessment of candidates begins. A practical pro-forma for a person specification appears in Appendix 4.

Training needs analysis

A training needs analysis details the expertise required to perform each job activity in the job description. The usual format comprises a sheet divided into four columns as shown in **Figure 4.**

Checking descriptions

It is important that the post-holder and his or her line manager sees the draft job description before it is finalised, and have the opportunity of suggesting additions and alterations.

In some organisations, job holders sign job descriptions as a true record of the job. In other organisations, it is felt that this rather formalised approach may detract from the analyst/post-holder relationship, and a signature is not required.

When the job description has been agreed, it is typed in its final form ready for use.

Keeping up-to-date

As mentioned earlier, a job description is of little use unless it is current. It must describe the job as it really is now. Jobs are dynamic and job descriptions soon become out of date. They should be checked periodically and, if necessary, updated and revised. A convenient mechanism for this is the staff appraisal interview. The early part of such an interview usually focuses on the activities and achievements of the past 12-24 months. During this review any changes the job description requires can be discussed and agreed.

Figure 4: Training needs analysis sheet

	Required expertise		
Job activity	Skills	Knowledge	Attitudes

APPENDIX 1: ACTIVE VERBS FOR USE IN JOB DESCRIPTIONS

Where appropriate, use verbs and phrases like:

Achieves	Contacts	Formulates	Participates in	Services
Acquires	Contributes	Gives	Performs	Specifies
Acts	Controls	Helps	Plans	Stores
Advises	Costs	Hires	Prepares	Studies
Allocates	Counsels	Implements	Presents	Submits
Analyses	Decides	Improves	Prices	Supplies
Appraises	Delegates	Informs	Produces	Teaches
Approves	Designs	Interviews	Promotes	Telephones
Ascertains	Develops	Issues	Provides	Tests
Assesses	Directs	Learns	Quantifies	Trains
Authorises	Encourages	Maintains	Receives	Tutors
Budgets	Ensures	Manages	Recommends	Updates
Calculates	Establishes	Maximises	Reports (to)	Validates
Circulates	Estimates	Meets	Represents	Verifies
Coaches	Evaluates	Monitors	Retains	Visits
Completes	Examines	Negotiates	Reviews	Works with
Conducts	Finds out	Organises	Selects	Writes
Consults	Forecasts	Oversees	Serves	

Avoi. vague phrases like:

Deputises for...
Is responsible for....
Liaises with....

APPENDIX 2: PERSON SPECIFICATION

Sample person specification sheet

Factor	Desirable	Essential
1. Skills a) b) c) 2. Knowledge		

Appropriate categories to list on the specification sheet might include the following.

Skills

Often represented by a qualification

Knowledge

Usually represented by a qualification

Experience

Time/length, type and so on.
Inter-related with skills and knowledge and can be compensatory factors if these factors are not up to the required standard.

Personal attributes

Physical, attitudes, intelligence.

Required test results

Acceptable levels should be specified if testing is to be used as part of the selection process.

Special circumstances

Any unusual requirements detailed by the needs of the job e.g. travelling flexibility.

Useful but not essential

Factors which would contribute to performance in a marginal way but absence of which would not be a bar to success.

APPENDIX 3: INTERVIEW'S CHECKLIST FOR JOB ANALYSIS

This checklist is designed for use by the analyst when undertaking job analyses. This example looks at the performance requirements for a manager in an FE college. However, the principles are more widely applicable.

Performance requirements – management post in FE

Aim

To determine the minimum level of each factor which is an essential requirement for successful performance of the job.

Pre-entry qualifications

What academic or vocational qualifications, basic knowledge, and particular skills are the minimum necessary for someone to be selected for this job?

Why are they needed?

Experience

Is previous experience essential?
Why?
How much and precisely what sort?

Learning period in the job

How long would it take an average person with the qualifications and experience defined as above to learn to perform the job competently with minimal supervision from above?

Contacts

What are the three most important working contacts outside the college?
At what level are these contacts?
What is their frequency?
What is their purpose?

What are the three most important working contacts within the college?
At what level are these contacts?
What is their frequency?
What is their purpose?

How far is the post-holder involved in human relationships, counselling or caring?

Has the job any responsibility for public relations - or effect on the image of the college?
Define how.

Responsibilities

Does the post-holder, of necessity, have access to confidential information?
If so, what information?
What would be the consequences of disclosure?

Give examples of decisions the post-holder would take without reference to others.

Give examples of decisions where a superior would be consulted before proceeding.

How far could decisions made by the post-holder without reference to others affect the operation of the college (both positively and negatively?
Give examples.

Describe any responsibility the post-holder has for controlling a budget, authorising expenditure or producing income.
Give approximate figures for the current year.

List the people reporting directly to the post-holder, with grades and a brief description of job purpose in each case.

How many people report directly to each of these subordinates?

Describe any responsibility the post-holder has for managing specific courses or leading course teams.
What is the post-holder required to do?

What specific responsibility, if any, does the post-holder have for health and safety?

Mental skills

How far does the post-holder work within established policies and procedures?
Does the post-holder have any involvement in creating these policies?

Give examples of judgements which have to be made by the post-holder in carrying out tasks, which illustrate the amount of initiative required by the job. How far does precedent help?

How far does the job require the analysis or ordering of information?
What information and for what purpose?

How far is planning or problem-solving involved? Give examples.

Working conditions

Is the post-holder required to work outside normal working hours, for example, evenings or weekends? With what frequency?

Describe any sub-standard working conditions which are detrimental to the post-holder's work. What percentage of working time is spent in these conditions?

APPENDIX 4: MODEL JOB DESCRIPTION

Job description:	*Marketing Co-ordinator*
Department:	*Marketing*
Number employed in this job:	*1*
Description update:	*4.3.91*

1 Job purpose

To lead and oversee the marketing activities in the college.

2 Major tasks

2.1 Recommends and implements college corporate and departmental promotional activities.

2.2 Advises on the development and interpretation of the college marketing policy and the college marketing plan.

2.3 Manages the development of self-financing course activities.

2.4 Oversees and monitors all aspects of customer service.

2.5 Assists the staff development officers in the identification and provision of appropriate training.

2.6 Co-ordinates working groups and teams undertaking marketing functions.

2.7 Manages the college marketing budget.

3 Job activities

- *Promotion*

3.1 Prepares or commissions designs for corporate publicity (including prospectuses, leaflets and newspaper advertising).

3.2 Advises on and implements publicity strategy and tactics at corporate and departmental level.

3.3 Co-ordinates college participation in exhibitions and other externally organised events.

3.4 Co-ordinates internal promotion events.

3.5 Manages print buying and the purchasing of promotional material.

3.6 Provides professional advice and guidance to departments on their own marketing activities.

- *Policy and planning*

3.7 Provides information relevant to course provision and planning, on customer perceptions and the corporate image.

3.8 Undertakes market research, often in relation to key market segments.

3.9 Advises management on marketing aspects of corporate strategic planning.

3.10 Ensures the compatibility of the college management information system with marketing function requirements.

3.11 Assists heads of department in the development of marketing plans for identified key target areas.

- *Self-financing courses*

3.12 Monitors and reports on self-financing course activity throughout the year.

3.13 Encourages the development of the college's industrial and commercial liaison activities.

3.14 Assists departments in the identification of and response to new client groups.

3.15 Develops and implements appropriate systems for the management of SFC activity.

3.16 Manages the activities of the SFC co-ordinator.

3.17 Develops appropriate databases and research activities.

3.18 Monitors and reports on activities of other training providers.

- *Customer service*

3.19 Develops and implements appropriate customer feedback processes.

3.20 Advises on appropriate corporate and departmental responses to information gathered through customer surveys.

3.21 Encourages the implementation of effective quality control measures.

3.22 Reviews, and reports on, customer handling processes.

3.23 Participates in consultative committees.

- *Staff development*

3.24 Identifies training needs related to marketing.

3.25 Advises on, organises and/or presents training at the request of the staff development officer.

3.26 Reviews and reports on learning materials and external training related to marketing.

3.27 Provides individual guidance and support to any member of staff seeking training related to the marketing function.

- *Working groups*

3.28 Plays an active role in the college marketing group.

3.29 Advises on the development of in-house publication facilities in particular the use of desk-top publishing.

3.30 Represents the college on the county marketing group.

3.31 Takes part in meetings of the county trainers' forum.

- *Budget*

3.32 Plans the allocation of the college marketing budget.

3.33 Records and monitors expenditure against the budget.

4 Performance requirements

- *Pre-entry qualifications*

4.1 Graduate membership of the Institute of Marketing is the appropriate qualification for this post.

4.2 A good working knowledge of marketing practices is required.

4.3 At least one year's practical experience, ideally but not necessarily in an educational setting, would be necessary due to the supervisory element in this job.

- *Learning period*

4.4 It would take a person with the qualifications and experience defined above at least a calendar year to become familiar with all aspects of the job.

- *Contacts and relationships*

4.5 Works with customers usually twice a term, and on consultative committees and the public at exhibitions (perhaps twice annually). Represents the college on county marketing and trainers' committees (two meetings each term). Gives work to printers and graphic designers.

4.6 Advises the senior management team on marketing matters and works with staff at all levels to encourage marketing activity.

4.7 The design of corporate publicity could have a marked effect on the college image, as could the promotional events the marketing co-ordinator organises.

4.8 Some information the post-holder acquires could be market-sensitive but there is no contact with confidential information relating to individuals.

4.9 The post-holder reports to the principal.

- *Decision-making and finance*

4.10 Makes decisions about the design and style of publicity, and the work priorities of the self-financing courses co-ordinator.

4.11 Most of the role is, however, advisory, and decisions are made by management taking account of the post-holder's advice.

4.12 Effective performance by the marketing co-ordinator could increase the number of students coming to the college and increase the volume of self-financing work undertaken.

4.13 The post-holder has overall control of the college marketing budget (£29,000 in 1990/91).

- *Responsibility for staff*

4.14 Manages the activities of the self-financing courses co-ordinator (0.5 post lecturer grade).

4.15 No responsibility for health and safety except as an employee.

- *Mental skills*

4.16 There is very little routine work in the job. The job relies on the post-holder to initiate policies and activity.

4.17 Market research can involve the collection and interpretation of complex information, requiring both analytical skills and judgement.

4.18 Planning activities include the organisation of exhibitions and other promotional events.

- *Working conditions*

4.19 Only works evenings when this is required by attendance at an exhibition (perhaps twice a year).

4.20 Shares an office with the self-financing courses co-ordinator.

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The Mendip Papers are a topical series of booklets written specially for managers in further and higher education. As managers and governors take on new responsibilities and different roles they face new challenges, whether in the areas of resource and financial management or in the pursuit of quality, the recruitment of students and the development of new personnel roles. The Mendip Papers provide advice on these issues and many more besides.

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