Performing Job Analysis

Scope—This article addresses the area of human resources known as job analysis. This treatment will discuss how job analysis can be used to identify the knowledge, skills and expertise required to effectively perform job assignments, establish criteria for selection and promotions, design objectives for training and development programs, develop the standards for the measurement of performance, and assist with the determination of pay classification levels. This article discusses the methods and processes used in conducting job analysis. It describes the difference between a job evaluation and a job analysis and defines common practices and trends.

Overview

Job analysis is the systematic study of a job to determine which activities and responsibilities it includes, its relative importance to other jobs, the personal qualifications necessary for performance of the job and the conditions under which the work is performed. An important concept in job analysis is that the job, not the person doing the job, is assessed, even though HR may collect some job analysis data from incumbents. *See* Job Analysis: How do I conduct a job analysis to ensure the job description actually matches the duties performed by the employee in the job? (www.shrm.org/ResourcesAndTools/tools-and-samples/hr-qa/Pages/conductjobanalysis.aspx)

Job analysis is often confused with job evaluation, but the two activities are quite different. Job evaluation is the process of comparing a job to other jobs within the organization to determine the appropriate pay rate and is not addressed in this toolkit. *See* Performing Job Evaluations (www.shrm.org/ResourcesAndTools/tools-and-samples/toolkits/pages/performingjobevaluations.aspx).

This toolkit covers the following topics:

- Reasons organizations invest time in performing job analysis.
- HR's responsibilities in conducting job analyses.
- The data collection process.
- Job analysis methods.
- Job descriptions.
- Job analysis resources.

Business Case

An organization's success depends on its employees' performance. Ideally, each job should interrelate to optimize achievement of the organization's mission, goals and objectives. Each employee's understanding of his or her role influences the return on investment (ROI). As a result, many HR leaders see job analysis as a pivotal aspect of effective human resource practice. It can affect every major HR competency (www.shrm.org/LearningAndCareer/competency-model/Pages/default.aspx) area, depending on its adequacy. For example, although the types of data each HR practice needs may vary, job analysis data can identify the knowledge, skills and expertise required for effective performance, establish criteria for selection and promotions, design objectives for training and development programs, develop

performance measurement standards, and assist with setting pay classification levels. A job analysis is normally documented via a job analysis questionnaire, and the end product is a job description, inclusive of clearly defined job specifications (i.e., required or preferred qualifications) for the job incumbent.

Uses for job analysis within an organization include:

- HR workforce planning.
- Organizational design.
- Performance management.
- Affirmative action plans.
- Recruiting and selection.
- Career and succession planning.
- Training and development.
- Compensation administration.
- Health, safety and security.
- Employee/labor relations.
- Legal defense.
- Risk management.

See Using Job Analyses to Prevent Musculoskeletal Injuries (www.shrm.org/resourcesandtools/hr-topics/risk-management/pages/job-analyses-musculoskeletal-injuries.aspx).

HR's Role

HR professionals play a key role in job analysis. They help managers determine the functions the organization requires and the best organizational structure and market price for such functions. HR also presents the compensation system as an equitable method of encouraging high employee engagement and performance.

The HR department and line management must work closely together to ensure that the job analysis process is effective. The following outlines a typical division of responsibilities between HR and line management. The outcome of the job analysis is the job description, which includes job specifications.

Typical HR responsibilities in the job analysis process include:

- Coordinating the job analysis process.
- Drafting job descriptions and specification for management review.
- Reviewing job descriptions and specifications periodically.
- Reviewing managerial input for accuracy.
- Seeking advice from outside sources for difficult or unusual analyses, if needed.
- Acting as a job analyst or panel facilitator as needed.

Typical line management responsibilities in the job analysis process include:

- Completing or delegating responsibility to complete job analysis information.
- Reviewing and maintaining job descriptions/job specification accuracy.
- Requesting revisions to the analysis as jobs change.
- Identifying performance standards based on job analysis information.
- Acting as a subject matter expert or panel member, if needed.

Job Analysis and Data Collection

Job analysis involves collecting information on characteristics that differentiate jobs. The following factors help make distinctions between jobs:

- Knowledge, skills and abilities (KSAs) needed.

- Work activities and behaviors.

- Interactions with others (internal and external).

- Performance standards.

- Financial budgeting and impact.

- Machines and equipment used.

- Working conditions.

- Supervision provided and received.

Grouping jobs with related functions is helpful in the job analysis process by identifying the job family, job duties and tasks of related work.

The following provides an example of how an organization may group related jobs:

- **Job family.** Grouping of related jobs with broadly similar content.

- **Job.** Group of tasks, duties and responsibilities an individual performs that make up his or her total work assignment.

- **Task.** A specific statement of what a person does, with similar tasks grouped into a task dimension (i.e., a classification system).

A technical service job family, for example, could be identified as follows:

- **Job family.** Technical Service.

- **Job.** Technical service representative.

- **Task.** Provides technical support to customers by telephone.

Job Analysis Methods

Determining which tasks employees perform is not easy. The observer's perception influences direct observation. The most effective technique, if feasible, is to collect information directly from the most qualified incumbent(s). It is preferable to use two methods, if possible— for example, direct observation and a structured questionnaire from job incumbents, or interviews and open-ended questionnaires from the job incumbents. The following describes the most common job analysis methods.

Open-ended questionnaire

Job incumbents and sometimes their managers fill out questionnaires about the KSAs necessary for the job. HR compiles the answers and publishes a composite statement of job requirements. This method produces reasonable job requirements with input from employees and managers and helps analyze many jobs with limited resources.

Highly structured questionnaire

These questionnaires allow only specific responses aimed at determining the frequency with which specific tasks are performed, their relative importance and the skills required. The structured questionnaire is helpful to define a job objectively, which also enables analysis with computer models.

Interview

In a face-to-face interview, the interviewer obtains the necessary information from the employee about the KSAs needed to perform the job. The interviewer uses predetermined questions, with additional follow-up questions based on the employee's response. This method works well for professional jobs.

Observation

Employees are directly observed performing job tasks, translating observations into the necessary KSAs for the job. Observation provides a realistic view of the job's daily tasks and activities and works best for short-cycle production jobs.

Work diary or log

A work diary or log is an anecdotal record the employee maintains and includes frequency and timing of tasks. The employee keeps logs over an extended period. HR analyzes the logs, identifies patterns and translates them into duties and responsibilities. This method provides an enormous amount of data, but much of it is difficult to interpret, not job-related and difficult to keep up-to-date.

Other methodologies

Analyzing jobs in different categories (e.g., a job requiring lower skill versus a complex technical job) requires a different approach. The concept of a "job" is changing shape as it becomes more common for employees to work in cross-functional project team environments and in matrix reporting relationships. Thus, job analysis methodologies that focus on the KSAs required to accomplish the primary duties and responsibilities of a particular job have come to the forefront.

Behavioral event interviewing, a competency-based job analysis, differs from the traditional job analysis, which focuses solely on the evaluation of tasks, duties and responsibilities. In behavioral event interviewing:

- A team of senior managers identifies future performance areas critical to the organization's business and strategic plans.
- HR assembles panels composed of individuals who are knowledgeable about the organization's jobs (i.e., subject matter experts). These groups may include high- and low-performing employees, managers, supervisors, trainers and others.
- A facilitator from HR or an outside consultant interviews panel members to obtain examples of job behaviors and actual occurrences on the jobs.
- The facilitator develops detailed descriptions of each competency, including descriptive phrases for clarity.
- HR rates the competencies, and panel members identify levels required to meet them.
- HR identifies performance standards for each job. The organization must develop and implement selection, screening, training and compensation instruments, or processes that focus on competencies.

According to a 2014 SHRM survey, the leading methods to conduct job analysis were interview (50 percent), observation (33 percent) and structured questionnaires (27 percent). *See* SHRM/ACT: Job Analysis Activities (www.shrm.org/hr-today/trends-and-forecasting/research-and-surveys/pages/2014-job-analysis-activities.aspx).

Job Descriptions and Specifications

HR uses the job analysis output to develop a job description and job specifications. The job description summarizes and organizes the information for the organization's job-related actions. Generally, the job description and specifications are combined but compartmentalized to enable independent updating as needed. The sections of a job description are outlined below.

- **Identification.** The first part of the job description lists the title, reporting relationships, department, location and the date of the analysis. This section also often includes other information useful in tracking positions and employees through the human resource information system (HRIS), such as internal job code, pay grade, exempt or nonexempt status and Equal Employment Opportunity Commission (EEOC) job classification.
- **Job summary.** The descriptive summary is a concise statement of the general duties and responsibilities that make the job unique.
- **Duties and responsibilities.** This section lists the job's essential duties and responsibilities using clear, declarative statements in priority order.
- **Job specifications.** This section identifies both the essential skills and experience and the nonessential skills and experience (i.e., preferred qualifications) to perform the job, and includes all information necessary to determine any possible accommodations under Americans with Disabilities Act (ADA) regulations. Job specifications are typically designated as KSAs, education and experience, and physical demands and work environment, depending on the nature and scope of the job.

- **Disclaimers and approval.** The disclaimer informs the employee that the job description is not a contract between the employee and the employer, that the employer may change the job description or that the employer may request the employee to perform additional duties. The approval component should include a section for the signatures of the supervisor and HR professional and the date approved. The job incumbent should also sign and date the document.

See How To Develop a Job Description (www.shrm.org/ResourcesAndTools/tools-and-samples/how-to-guides/Pages/developajobdescription.aspx)and Sample Job Descriptions (www.shrm.org/ResourcesAndTools/tools-and-samples/job-descriptions/Pages/default.aspx).

Compensation Decisions

In relation to employee pay practices, job analysis has two critical uses: It establishes similarities and differences in job content, and it helps determine the internal equity and relative worth of like jobs. If jobs have equal content, then the pay established for them will likely be equal. If, on the other hand, job content is perceptibly different, then those differences, along with the market rates, will become part of the rationale for paying certain jobs differently.

Selection Assessments

Job analysis information can also be used as a basis for developing employment assessments. Specifically, assessments are developed to measure the most critical tasks or KSAs resulting from the job analysis for a given job. Some assessments involve work samples that simulate job tasks and require candidates to demonstrate that they can perform these tasks effectively. HR uses job-oriented or task-based job analysis data as a basis for developing these types of assessments because they focus directly on assessing how well job candidates can perform critical work tasks. Other assessment methods focus on measuring KSAs that are required to perform job tasks effectively, such as various mental abilities, physical abilities or personality traits, depending on the job's requirements. If one were selecting a manager, for example, it would be important to assess whether candidates could solve complex business problems, be decisive and communicate effectively. Alternatively, if one were selecting an administrative assistant, KSAs such as the ability to perform work conscientiously and the ability to perform work with speed and accuracy would be much more important for identifying capable candidates. HR uses worker-oriented or KSA-based job analysis data as a basis for developing assessment methods that focus on a job candidate's underlying abilities to perform important work tasks.

According to the 2014 SHRM survey, 45 percent of HR professionals have used information from job analyses for purposes beyond identifying what was required for a job/role, such as developing interview questions. *See* Three-Fourths of HR Professionals Use Job Analysis Data for Recruitment, New SHRM Survey Finds (www.shrm.org/about-shrm/press-room/press-releases/pages/job-analysis-news-release.aspx).

Resources

O*Net (http://www.onetonline.org/), the Occupational Information Network, is a comprehensive database containing information on hundreds of standardized and occupation-specific descriptors sponsored by the U.S. Department of Labor's Employment and Training Administration through a grant to the North Carolina Department of Commerce. O*Net covers more than 950 occupations based on the Standard Occupational Classification (http://www.bls.gov/SOC/) (SOC) developed by the U.S. government. The O*Net system supersedes the *Dictionary of Occupational Titles (DOT)*.

HR practitioners may use this source to develop job descriptions and define job-specific success factors and for other purposes related to training, recruiting and selection. O*Net also provides extensive links to additional workplace resources. It is a timesaving resource for job analysis and for others writing job descriptions and specifications. *See* O*Net Resource Center (http://www.onetcenter.org/).

Templates and Tools

Samples

Job Analysis: Desk Audit Review (www.shrm.org/ResourcesAndTools/tools-and-samples/hr-forms/Pages/1cms_015841.aspx)

Job Analysis: Time and Motion Study Form (www.shrm.org/resourcesandtools/tools-and-samples/hr-forms/pages/employeetimeanalysis.aspx)

Job Analysis Template #1 (www.shrm.org/resourcesandtools/tools-and-samples/hr-forms/pages/cms_001973.aspx)

Job Analysis Template #2 (www.shrm.org/resourcesandtools/tools-and-samples/hr-forms/pages/jobanalysisform.aspx)

ADA: Job Analysis/Job Description ADA List (www.shrm.org/resourcesandtools/tools-and-samples/hr-forms/pages/ada_jobanalysisjobdescriptionadalist.aspx)

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