1. Job and Role Analysis[1]

Job and role analysis provides the essential framework for job evaluation, as described in Chapters 11 and 12, and grade structure design (Chapter 16). It also produces crucial information for performance management (Chapters 18 and 19) and many other key HR processes such as human resource development, talent management and career planning.

1.1. JOB ANALYSIS - A DEFINITION

Job analysis is the process of collecting, analysing and organizing information about jobs. It provides the basis for a job description or role definition and data for job evaluation, organization design or review, performance management, succession planning and career management, and other human resource management purposes.

A distinction should be made between a job description and a role definition. A job description sets out the purpose of a job, where it fits in the organization structure, the context within which the job holder functions and the principal accountabilities of job holders, or the main tasks they have to carry out. A role definition additionally describes the part to be played by individuals in fulfilling their job requirements. Role definitions refer to broader aspects of behaviour, for example, working flexibly, working with others, and styles of management. They may incorporate the results of skills or competence analysis, as described below.

1.2. JOB ANALYSIS IN PRACTICE

Job analysis as defined by Pritchard and Murlis is an analytical process involving gathering facts, analysing and sorting these facts and reassembling them into whatever consistent format is chosen.

Job analysis gets the facts about a job from a job holder, the job holder's manager (preferably both) and the job holder's colleagues or team mates. It is not a matter of obtaining opinions or making judgements. What goes into a job description should be what actually happens and why, not what people would like to think happens, or what they feel people should be like to make it happen. Thus judgmental statements such as 'Carries out the highly skilled work of...' should be avoided (who is to say that the work is highly skilled and in comparison with what?).

The facts can be obtained by interviews (the best but most time-consuming way) or by asking job holders and/or their managers to write their own job descriptions in a structured format. It is helpful in both cases to provide guidance on what is needed and be quite clear about the questions to be asked and answered, and it is essential in the latter case to provide guidance on how the analysis should be carried out and expressed on either paper or on-screen.

Alternatively, questionnaires can be used - either universal questionnaires or those designed for job families.

Universal questionnaires

Universal questionnaires are designed to cover all the jobs to be analysed. They are typically used in association with computer-assisted job evaluation processes. They should be tailored to the particular organization and the range and type of jobs to be covered, and they should focus on those aspects of performance and values which are considered to be important in the organization concerned. It is usual to incorporate multiple choice questions, as in the example given in Figure 10.1, but questions may simply ask for a number to be entered to establish the dimensions of the job, for example, number of people supervised or the value of the budget controlled.

Job family questionnaires

Job family questionnaires are designed to establish the main factors which differentiate between jobs at different levels in a job family. A job family consists of jobs in a particular function or discipline such as research scientist, development engineer or personnel specialist, which are related in terms of the fundamental activities carried out but are differentiated by the levels of responsibility skill or competence required (job and career families and the 'ladders' used to describe changing levels of work are discussed in more detail in Chapter 15).

Figure 10.1 Typical questions from a universal questionnaire

Select the level that best describes the most common way in which the job must liaise with others. (Internal means within the company and includes remote sites/headquarters, etc.)

1. The job involves no need for contact outside the particular work group and its management.

2. The job involves infrequent contact with others, and the contact is for the purpose of exchanging job-related information, which needs to be done accurately and effectively.

3. The job requires frequent contact with people outside the department in order to provide or obtain information. There is a need to express oneself clearly. The job requires courteous behaviour in face-to-face dealings with other employees.

4. The need to express oneself clearly is an important part of the job, and job holders will typically have had specific training in communications skills or will have been selected because they possess these skills. The importance stems from a requirement to create a favourable impression on others as well as communicate information effectively.

5. The job requires you frequently to seek cooperation from, or influence others. The job holder must develop relationships and persuade others to help resolve problems. The ability to listen to others and to develop a mutual understanding is an important requirement of the job. This level usually includes jobs which allocate, monitor and review work of other employees, or jobs which have regular and significant dealings with colleagues in a variety of different locations.

6. The job requires you to motivate subordinates or colleagues where the degree of motivation and commitment achieved will directly impact upon the result of the department.

7. The job requires highly developed communication skills for dealing with sensitive, or potentially controversial interpersonal situations. The job holder must create behaviour change in people and/or obtain the cooperation and commitment of subordinates/colleagues. This level is usually required for positions responsible for the development, motivation, assessment and reward of other employees.

A job family questionnaire is designed with the advice of an expert team of managers from the organization. It is based on definitions of the differentiating factors and the levels at which they may be present in a job. The questions are then structured to establish the levels for each factor (Fig. 10.2).

Figure 10.2 Extract from a job family questionnaire for a group of clerical and administrative jobs

QUESTION 4 - INFORMATION HANDLING
Please tick the box which best describes the job:

□ 1. No responsibility for the processing of data.

□ 2. Responsible for checking data, and referring errors for correction.

□ 3. Responsible for maintaining, checking, updating and deleting information held in files or systems of predetermined format.

□ 4. Responsible for extracting information from files or systems and compiling reports in standard format.

□ 5. Responsible for gathering information from a variety of established sources and compiling reports with an agreed framework.

□ 6. Responsible for compiling special and one-off reports, using data from a range of sources, involving non-standard information retrieval and report formats.

□ 7. Responsible for identifying new sources of information and/or the setting up of new administrative procedures, systems and reporting formats.

Job analysis interview check lists

Elaborate check lists are not necessary. They only confuse people. The essence of the art of job analysis is to keep it simple. The points to be covered are:

- What is your job title?
- To whom are you responsible?
- Who is responsible to you? (An organization chart is helpful.)
- What is the main purpose of your job? That is, in overall terms, what are you expected to do and why?
- To achieve that purpose, what are your main areas of responsibility (eg principal accountabilities, key result areas or main tasks)? Describe what you have to do, not, in any detail, how you do it. Also indicate why you have to do it, ie the results you are expected to achieve by carrying out the task.
- What are the dimensions of your job in such terms as output or sales targets, numbers of items processed, numbers of people managed, number of customers?
- Is there any other information you can provide about your job to amplify the above facts, such as:
- how your job fits in with other jobs in your department or elsewhere in the company;
- flexibility requirements in terms of having to carry out a range of different tasks;
- how work is allocated to you and how your work is reviewed and approved;   v
- your decision-making authority;
- the contacts you make with others, inside and outside the company - the equipment, plant and tools you use;
- other features of your job such as travelling or unsocial hours or unusual physical conditions;
- the major problems you meet in carrying out your work;
- the knowledge and skills you need to do your work.

The aim is to structure the job analysis interview or questionnaire in line with these headings.

Analysing the facts

However carefully the interview or questionnaire is structured, the information is unlikely to come out neatly and succinctly in a way which can readily be translated into a job description or role definition. It is usually necessary to sort out, rearrange and sometimes rewrite the information under the headings and in the manner described below. But writing job descriptions or role definitions is not a literary exercise. All that is required is clear and simple prose.

1.3. JOB DESCRIPTIONS

The format for job descriptions will depend upon the requirements of the organization. There are many varieties but one which is commonly used consists of the following sections.

Purpose

This is a short statement of why the job exists. It should be expressed in a single sentence. When defining the purpose of a job consider:

- What part of the organization's/unit's total purpose is accomplished by this job?
- What is the unique contribution of this job which distinguishes it from other jobs?
- How would you summarize the overall responsibility of the job holder?

Organization

This section explains where the job fits into the organization. It sets out the job title of the person to whom the job holder is responsible and the job titles of the people who are directly responsible to the job holder. An organization chart helps illustrate the context/peer group. It should not indicate or imply relative seniority or status.

Principal accountabilities

Principal accountabilities (also known as key result areas, main tasks, main duties, major activities, key responsibilities etc) are statements of the continuing end results or outputs required of the job. They answer the question: 'What are the main areas in which the job must get results to achieve its purpose?' For most jobs between four and eight account-abilities are sufficient to cover the major result areas. Less than four probably means something is missing; more than eight may mean that individual tasks are being listed.

The main characteristics of principal accountabilities are that:
- taken together, they represent all the major outputs expected of the job;
- they focus on what is required (results and outputs) not how the job is done (detailed tasks and duties);
- each one is distinct from the others and describes a specific area in which results are to be achieved;
- they suggest (but need not state explicitly) measures or tests which could determine the extent to which the accountabilities are being fulfilled.

An accountability statement is written in the style: 'Do something in order to achieve a stated result or standard.' Each statement is made in one sentence beginning with an active verb such as prepare, produce, plan, schedule, test, maintain, develop, monitor, ensure.

Context

The context section, also called 'nature and scope' is designed to add flavour to the bare list of principal accountabilities by describing aspects of the job and the role of the job within the context of the organization.
It is usually expressed in a structured narrative which follows the questions raised at the analysis stage, namely:
- where the job fits in with other key aspects of the work of the organization or unit;
- decision-making authority;
- how work is assigned, reviewed and approved;
- the particular knowledge, skills and experience required;
- the degree of flexibility needed to undertake different tasks or use different skills;
- the particular demands of the job in such areas as total quality management, leadership, team working, interpersonal skills, planning, crisis management etc;
- the major problems job holders are likely to meet in carrying out their
- work;
- physical conditions;
- the plant, equipment or tools used.

Dimensions

The dimensions (sometimes called the critical dimensions) of a job include any quantitative data which indicate its size and the range of responsibilities involved. For example, output, number of items processed, sales turnover, budgets, costs controlled, numbers supervised, and number of cases dealt with over a period.

1.4 ROLE PROFILES

A role profile expands the basic information contained in a job description by including more information on the skill and behavioural requirements of a job. Role profiles

provide the basis for performance management, recruitment and career planning as well as the information required to develop and manage a contribution-related pay structure and develop career families.

Role profiles are based on a comprehensive analysis of a role covering:
- the achievements and outputs required by the organization;
- the skills, knowledge and expertise required in the role;
- the competences which defines how the outputs should be achieved.

The achievement and outputs are covered by a conventional job description in terms of purpose and principal accountabilities. Additionally, in order to obtain a full understanding of a role, it is necessary not only to analyse and describe the technical knowledge, skills and experience needed to deliver the required level of output but also the behavioural competencies that characterize the role and strongly influence how it should be performed.

It is useful to distinguish between:
- *skills* - learnable skills, knowledge and expertise; and
- *competencies* - behavioural characteristics which can be demonstrated to differentiate high performers in a given role under such headings as planning and organizing, influencing, achievement drive and concern for order.

1.5. GENERIC ROLE PROFILES

Generic role profiles cover groups or families of jobs where the nature of the tasks carried out is basically the same although there may be significant differences in the level of work undertaken.

For example, in a branch organization, the role of all branch managers will fundamentally be the same but the size of the branches, in terms of income and number of customers, and therefore the size and complexity of the role, may vary considerably. Or, in the case of design engineers working in a research and development organization, the basic role may be the same but the level at which engineers operate will vary in terms of such factors as undertaking more difficult or complex assignments, carrying out more sophisticated experiments or being involved in a wider range of projects requiring different skills and abilities.

Increasing use is being made of generic role profiles for two reasons:
- *Process efficiency* - there is no point in carrying out a detailed separate role analysis for every generic role in categories such as those mentioned above. All that is necessary is to produce a generic role profile covering the common ground and then identify any variations in the level at which the work is carried out. This variation analysis can be applied generically to produce a ladder of jobs differentiated by the levels at which these distinct factors apply.
- *Role flexibility* - the increasing requirement to build job flexibility into role profiles has encouraged the growth of generic approaches. If, for example, a group of technicians is carrying out broadly the same kind of work but on different projects, defining the role generically gives greater flexibility as people move from project to project. This avoids having to go through the unnecessary task of rewriting the job description each time, only to arrive at much the same result.
- *Role matching* - generic role profiles are useful when 'matching' roles to the descriptions of grades in a pay structure to enable them to be allocated to grades without having to evaluate them separately (see Chapter 11).

For roles where there are no significant differences in the levels at which the work is carried out, a conventional job description format is suitable, with only minimal amendments required.

Where, however, there are differences in the level of work, it is necessary to define a series of these levels to form a ladder or family of generic roles. This approach has been used for many years in professional and technical areas, but it is now being extended to other functions as the requirement for flexibility means that jobs have to be more generically defined, while still recognizing the need to distinguish between levels of work.

It is, however, necessary to bear in mind the importance of ensuring that generic role profiles are only used when posts are broadly the same. In most organizations there will always be a proportion of jobs which are individual and which should not be streamlined into generic formats.

1.6. THE SIGNIFICANCE OF JOB AND ROLE ANALYSIS

Job and role analysis can be an exacting and time-consuming process. But the effort is worthwhile. In the absence of sound job, skill and competency analysis, the processes of job evaluation, conducting market rate surveys and performance management cannot be carried out effectively. In addition, a database of properly analysed and defined jobs and roles can be an essential part of a human resource expert system used for such key activities as recruitment, training, continuous development, career planning, organization development and job design.