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**JOB EVALUATION**

**MANAGEMENT STAFF**

**EXPLANATORY GUIDE**  
**AND**  
**JOB ANALYSIS QUESTIONNAIRE**

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## **INTRODUCTION**

The explanatory guide and questionnaire were designed to help a senior staff member in a school board to prepare his or her job description for job evaluation or classification review purposes following integration into the new classification plan.

An evaluation request must be made under section 24 of the *Regulation respecting certain conditions of employment of senior staff of school boards and of the Comité de gestion de la taxe scolaire de l'île de Montréal*. A request for classification review must be made in accordance with the provisions of Schedule 13 of the Regulation.

The explanatory guide and questionnaire also apply, with the necessary changes, to the incumbent of a senior executive position.

## **EVALUATION METHOD AND TOOLS**

The evaluation method used for all management positions in the education sector is the Hay<sup>®</sup> Method. Thus, it is imperative that the description contain all the information required to analyze the nature of the work based on the principles of the Hay<sup>®</sup> Method. The explanatory guide will help the incumbent to complete the questionnaire.

## **INSTRUCTIONS**

Given that the job description is the basis on which a position is evaluated, it is important to fill out the job analysis questionnaire in a clear and concise manner.

The explanatory guide sets out in a clear way each of the sections of the questionnaire, specifying the important elements that the incumbent must indicate or underline.

The incumbent of a position may fill out the questionnaire using a computer and may obtain a copy of the questionnaire on the Internet site of the CPN (CPNCF and CPNCA—Classification plans) at the following addresses:

<http://www.cpn.gouv.qc.ca/cpnf/>

[http://www.cpn.gouv.qc.ca/cpnca\\_fr/](http://www.cpn.gouv.qc.ca/cpnca_fr/)

The incumbent who is unable to use a computer to fill out the questionnaire must write legibly (block letters) using a black ball-point pen.

The competent authority of the school board must return the original of the questionnaire, duly completed and signed by the incumbent and his or her immediate superior, to the following address:

Lynda Boucher  
Direction des politiques administratives et de la rémunération  
Ministère de l'Éducation, du Loisir et du Sport  
150, boul. René-Lévesque Est, 17<sup>e</sup> étage  
Québec (Québec) G1R 5X1

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## **EXPLANATORY GUIDE**

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## 1. **JOB IDENTIFICATION**

The sections of the questionnaire reserved for identifying information about the position must be completed.

### **NAME OF SCHOOL BOARD**

To which school board is the position attached?

### **JOB TITLE**

The incumbent must specify the job title or name assigned by the school board.  
*Example: Director of financial resources (or director of services other than...)*

### **CLASSIFICATION**

Under this heading, the incumbent must identify the classification assigned to his or her position.  
*Example: class 8*

In the case of a request for a classification review following integration into the new classification plan, the incumbent must indicate the classification of his or her position before integration and the classification assigned at the time of integration.  
*Example: D2-II before integration and class 8 after integration*

### **DEPARTMENT, SERVICE OR INSTITUTION**

The incumbent must indicate the name of the department, service or institution in which he or she works.

### **STUDENT POPULATION SERVED**

The total population served means the total number of students or group-hours of instruction used to determine the incumbent's classification. If the incumbent is responsible for more than one institution or school, the population for each institution or school must be specified.

The student population must be calculated in accordance with sections 16 to 22 of the *Regulation respecting certain conditions of employment of senior staff of school boards and of the Comité de gestion de la taxe scolaire de l'île de Montréal*.

Should a problem arise in calculating the number corresponding to the student population served, the senior staff member may consult the Department of Human Resources of his or her school board.

### **IMMEDIATE SUPERIOR'S TITLE AND CLASSIFICATION**

The incumbent must specify the title and classification of his or her immediate superior.  
*Example: Director general HCO-III (or administrator 15)*

## 2. **MINIMUM QUALIFICATIONS REQUIRED**

The incumbent must check the box next to the statement describing the minimum qualifications required to perform his or her job. The minimum qualifications are specified in each of the reference positions in Schedule 1 of the *Regulation respecting certain conditions of employment of senior staff of school boards and of the Comité de gestion de la taxe scolaire de l'île de Montréal*.

If it is not a reference position, the incumbent must specify the minimum qualifications required by the school board to perform the job.

### 3. PRIMARY JOB PURPOSE

In this section, the incumbent must write a brief description outlining the reason or reasons why his or her job exists. **He or she must provide a one or two-sentence statement that describes the general function of the position and how it differs from positions of a lower or higher level in the hierarchical structure.** To meet these requirements, the incumbent must focus on the essential job functions.

As regards the sectors of activity or fields of intervention, he or she should indicate, for example, the following:

Sectors of activity: administrative services, educational services

Fields of intervention: supervision of institutions, services

It should be noted that the second part of the question is intended for those who hold more than one position.

### 4. PRINCIPAL DUTIES AND RESPONSIBILITIES

A job statement usually begins with an action verb to describe what is done. It is also important to be concise, to choose action verbs that describe exactly what the incumbent does and to give as accurate a picture as possible.

When describing the duties, the incumbent must list them in a logical order so as to provide a clear understanding of the position. For this reason, it is important to describe the duties in order of importance, beginning with the duty that demands the greatest amount of time in terms of percentage. **A percentage must be entered based on the time spent in each.** The percentage must correspond to a multiple of 5 and must total 100%.

In general, between 6 and 10 statements suffice to describe 100% of the total time it takes to perform the job functions.

### 5. KNOW-HOW

Know-how is defined as the sum total of every kind of knowledge and skill required to adequately perform the duties inherent in the position, regardless of the manner in which they were acquired.

Two fundamental ideas emerge from this definition. On the one hand, the expression “regardless of the manner in which they were acquired” means there can be no automatic evaluation of the knowledge and skills linked directly to the level of schooling or years of experience. It is important to demonstrate why it is necessary to have a certain level of knowledge and experience in performing the duties related to the job.

On the other hand, the expression “to adequately perform the duties inherent in the position” means that the know-how needed for a performance that meets all the requirements of the position is measured, regardless of the incumbent’s effectiveness.

#### 5.1 SKILLS

The purpose of this question is not to describe the level of schooling and years of experience, but rather the knowledge required, in the incumbent's opinion, to do the job and acquired either through schooling or experience.

In describing the knowledge required, the incumbent should indicate whether his or her position requires specialized knowledge in a given area or general knowledge in many areas.

## **5.2 MANAGERIAL KNOW-HOW**

In this section, the incumbent must describe, in a position involving human resources management, the knowledge and skills required to plan, organize, lead and control the administrative units, sectors of activity or institutions.

Also, the incumbent must describe the coordination needs required by the diversity of the duties related to the position as well as the skills required to manage the resources, conflicts and establish the priorities in time.

## **5.3 HUMAN RELATIONS**

This question is used to measure the human relations skills required in the incumbent's position, such as:

- good working relations with colleagues;
- listening skills;
- tact and diplomacy;
- empathy;
- persuasiveness;
- negotiation skills;
- ability to delegate to subordinates;
- ability to motivate and lead work teams.

Human relations skills include the skills needed to deal with subordinates, peers, superiors, clientele or users outside the school board.

## **6. PROBLEM SOLVING**

Problem solving is the level of initiative and original thinking needed to resolve the problems inherent in the job.

Under this section, the evaluator needs to know the main problems that the incumbent encounters in performing his or her duties. When answering the questions in this section, the incumbent must consider typical situations rather than the most extreme or emergency situations that occur occasionally.

The incumbent must give specific examples to illustrate the most important components (rush periods, problem student population, regulations requiring significant interpretation, location of head office, sharing of responsibilities and so on).

### **6.1 MAJOR PROBLEMS CONFRONTED IN THE POSITION**

The incumbent must describe the nature of the major problems and concerns experienced (working under pressure, problem student population, specific environment, tight deadlines, complexity and variety of programs and so on) in performing his or her duties and underline the consequences of his or her actions, recommendations and decisions.

### **6.2 MAJOR CHALLENGES FACED IN THE POSITION**

The incumbent must describe the aspects of his or her position that he or she considers as the most important challenges or objectives to be attained.

### **6.3 REGULATORY AND ORGANIZATIONAL FRAMEWORK**

The incumbent indicates, in the first section, to what extent he or she must refer, in performing his or her duties, to laws, policies, regulations, administrative practices, procedures, standards or rules of the school board.

The incumbent must also specify the main circumstances or situations in which he or she calls upon his or her immediate superior or other persons (administrative units or sectors of activity of the school board) for help or assistance.

This section measures the extent of the help provided to the incumbent in performing his or her duties.

## **7. ACCOUNTABILITY**

This factor corresponds to the effect of the job on certain end results and the importance of those results to the organization.

While the preceding questions dealt with the total know-how required to perform the duties of the position as well as the mental effort required in terms of thinking and problem solving, the latitude permitted to bring about certain specific results or to influence the results to be achieved must also be considered in order to measure the extent of the results and the direct influence of the position on those results.

### **7.1 FREEDOM TO ACT**

This question measures the latitude permitted to take action, follow up on decisions and participate in developing the activities of the sector. For this reason, the incumbent must also specify the nature and scope of the controls to which the position is subject.

The freedom to act is circumscribed by the existing relationship with a hierarchical superior as well as the management systems in place.

The incumbent must describe the most significant contacts that he or she is likely to have with other administrative units or the population served within the organization as well as those outside the organization with various intervenors.

### **7.2 IMPACT ON END RESULTS**

Under this section, the incumbent describes the effect that his or her job has on his or her department, service or institution, its organization, operation and objectives sought. The incumbent must provide, wherever possible, examples to illustrate the kind of effect that his or her decisions and recommendations have on the organization or the student population served.

### **7.3 MAGNITUDE AND SCOPE OF RESPONSIBILITIES**

This section is designed to evaluate the level of management responsibilities. It also measures the dimension of the sphere of activities affected by your position. It includes three major parts:

#### **7.3.1 RESPONSIBILITY FOR MANAGING HUMAN RESOURCES**

This section presents the number of employees, by category, under the incumbent's direct or indirect supervision in his or her department, service or institution.

### **7.3.2 RESPONSIBILITY FOR MANAGING FINANCIAL RESOURCES**

The incumbent describes the size of the budgets that he or she must manage for the current fiscal year. He or she must indicate the expenditures and revenues, where applicable, on which his or her position has a direct impact.

### **7.3.3 OTHER QUANTITATIVE INFORMATION**

Under this section, the incumbent provides any other quantitative information required for a better understanding of his or her position. The information may deal with, for example, services dispensed, number of noon-hour meals served, student population, number of buildings and so on.

## **8. SPECIFIC WORKING CONDITIONS**

Working conditions measure the intensity, frequency and duration of the physical, environmental, sensory or psychological conditions under which the incumbent performs his or her duties. The answers must emphasize, if need be, the specific working conditions applicable to the job over which the incumbent has no control.

### **8.1 ENVIRONMENT**

This section must be filled out only if it provides pertinent additional information about certain elements inherent in the working environment and conditions.

### **8.2 PHYSICAL EFFORT AND SENSORY ATTENTION**

Under this section, the incumbent identifies the physical effort, unpleasant conditions and dangers or risks inherent in performing his or her duties, specifying their nature, duration and frequency.

### **8.3 STRESS**

The incumbent describes briefly the factors inherent in his or her work or working environment, which increase the risk of tension and anxiety (intensity, duration and frequency).

## **9. POSITION IN HIERARCHICAL STRUCTURE (ORGANIZATION CHART)**

Under this section, the incumbent must identify the administrative units surrounding the position under study, that is, the administrative unit that an immediate superior oversees or the administrative units that his or her peers or subordinates oversee.

This section must include any pertinent information that can be useful in adding clarity to the answers provided, particularly by providing organization charts of the school board and of his or her department, service or institution.

## **10. ADDITIONAL INFORMATION**

This section is reserved for any other useful information required for a clear understanding of the position and not covered in any other question.

## 11. SIGNATURES

This section is reserved for signatures. The incumbent must provide his or her telephone number, should additional details be required for job evaluation purposes.

The immediate superior must sign the questionnaire.

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**JOB ANALYSIS QUESTIONNAIRE**

**MANAGEMENT STAFF**

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**1. JOB IDENTIFICATION**

NAME OF SCHOOL BOARD	
JOB TITLE	CLASSIFICATION <u>BEFORE</u> INTEGRATION
	CLASSIFICATION <u>AFTER</u> INTEGRATION
DEPARTMENT, SERVICE OR INSTITUTION	STUDENT POPULATION SERVED
IMMEDIATE SUPERIOR'S TITLE	CLASSIFICATION

**2. MINIMUM QUALIFICATIONS REQUIRED**

CHECK THE BOX CORRESPONDING TO THE MINIMUM QUALIFICATIONS REQUIRED		
Education	Minimum experience required	Specific requirements
Secondary V	Less than 6 months	Teaching permit
College	6 months to 1 year	Competency card
Undergraduate university studies	1 to 2 years	Other. Please specify.
Graduate university studies	2 years or more	
Postgraduate university studies	Other. Please specify.	
Other. Please specify.		

**3. PRIMARY JOB PURPOSE**

<p>STATE THE REASON OR REASONS WHY YOUR JOB EXISTS. LIST THE PRINCIPAL SECTORS OF ACTIVITY OR FIELDS OF INTERVENTION, IF NEED BE.</p>

**4. PRINCIPAL DUTIES AND RESPONSIBILITIES**

<b>DESCRIBE IN A CLEAR AND CONCISE MANNER AND IN ORDER OF IMPORTANCE THE MAIN AND USUAL DUTIES THAT YOU PERFORM BY SPECIFYING THE PERCENTAGE OF TIME DEVOTED TO EACH DUTY ON AN ANNUAL BASIS.</b>	<b>PERCENTAGE %</b>

## **5. KNOW-HOW**

### **5.1 SKILLS**

**BRIEFLY DESCRIBE THE NATURE AND VARIETY OF THE SKILLS THAT, IN YOUR OPINION, ARE REQUIRED TO PERFORM YOUR JOB.**

### **5.2 MANAGERIAL KNOW-HOW**

**BRIEFLY DESCRIBE THE NATURE AND VARIETY OF THE MANAGERIAL KNOW-HOW REQUIRED TO PERFORM YOUR DUTIES, TAKING INTO ACCOUNT THE SUM TOTAL OF THE RESOURCES AVAILABLE AND THE DUTIES INHERENT IN THE POSITION.**

### **5.3 HUMAN RELATIONS**

**BRIEFLY DESCRIBE THE HUMAN RELATIONS SKILLS REQUIRED TO PERFORM YOUR DUTIES.**



## **7. ACCOUNTABILITY**

### **7.1 FREEDOM TO ACT**

**DESCRIBE YOUR DEGREE OF AUTONOMY AS WELL AS THE NATURE AND FREQUENCY OF THE SUPERVISION RECEIVED FROM YOUR IMMEDIATE SUPERIOR IN PERFORMING YOUR DUTIES.**

**DESCRIBE, IN THE CONTEXT OF YOUR JOB, THE NATURE AND FREQUENCY OF INTERNAL AND EXTERNAL COMMUNICATIONS AS WELL AS THE CATEGORIES OF PEOPLE FOR WHOM THEY ARE INTENDED.**

### **7.2 IMPACT ON END RESULTS**

**DESCRIBE HOW THE PERFORMANCE OF YOUR DUTIES BRINGS ABOUT THE RESULTS EXPECTED AND THE DELIVERY OF THE PROGRAMS IN YOUR DEPARTMENT, SERVICE OR INSTITUTION.**

**7.3 MAGNITUDE AND SCOPE OF RESPONSIBILITIES**

**7.3.1 RESPONSIBILITY FOR MANAGING HUMAN RESOURCES**

INDICATE THE NUMBER OF PERSONS WORKING UNDER YOUR DIRECT OR INDIRECT RESPONSIBILITY.				
CATEGORIES OF EMPLOYEES SUPERVISED	UNDER DIRECT RESPONSIBILITY		UNDER INDIRECT RESPONSIBILITY	
	INDIVIDUALS	FTE *	INDIVIDUALS	FTE*
SENIOR STAFF				
TEACHERS				
PROFESSIONALS				
SUPPORT (TECHNICAL, PARATECHNICAL AND ADMINISTRATIVE)				
WORKMEN (QUALIFIED OR NOT)				
OTHER (SPECIFY)				
TOTAL STAFF				

\*Full-time equivalent

**7.3.2 RESPONSIBILITY FOR MANAGING FINANCIAL RESOURCES**

INDICATE THE MEASURABLE FINANCIAL RESOURCES ON WHICH YOUR POSITION HAS A DIRECT EFFECT.	
BUDGET	DEPARTMENT, SERVICE OR INSTITUTION
SALARY MASS BUDGET	
OPERATING BUDGET (OTHER THAN SALARY MASS)	
AUTONOMOUS REVENUE BUDGET (SPECIFY)	
OTHER BUDGET (SPECIFY)	
TOTAL BUDGET	

**7.3.3 OTHER QUANTITATIVE INFORMATION**

PROVIDE ANY OTHER QUANTITATIVE INFORMATION REQUIRED FOR A CLEAR UNDERSTANDING OF YOUR POSITION.

## **8. SPECIFIC WORKING CONDITIONS**

### **8.1 ENVIRONMENT**

**BRIEFLY DESCRIBE THE CHARACTERISTICS OF YOUR WORKING ENVIRONMENT.**

### **8.2 PHYSICAL EFFORT AND SENSORY ATTENTION**

**BRIEFLY DESCRIBE THE HIGHEST LEVEL OF PHYSICAL EFFORT, CONCENTRATION AND SENSORY ATTENTION REQUIRED IN THE POSITION IN TERMS OF INTENSITY, DURATION AND FREQUENCY.**

### **8.3 STRESS**

**BRIEFLY DESCRIBE THE FACTORS INHERENT IN THE POSITION OR ENVIRONMENT THAT INCREASE THE RISK OF TENSION AND ANXIETY (INTENSITY, DURATION, FREQUENCY).**

**9. POSITION IN HIERARCHICAL STRUCTURE (ORGANIZATION CHART)**

**ILLUSTRATE WHERE YOUR POSITION IS SITUATED IN THE HIERARCHICAL STRUCTURE OF YOUR ORGANIZATION AND ADMINISTRATIVE UNIT. TO DO THIS, REPRODUCE OR APPEND ONE OR MORE ORGANIZATION CHARTS.**

A large, empty rectangular box with a black border, intended for the applicant to reproduce or append organization charts showing their position within the organization's hierarchy.

**10. ADDITIONAL INFORMATION**

**APPEND ANY OTHER DOCUMENT AND SPECIFY ANY ADDITIONAL INFORMATION THAT IS USEFUL FOR A CLEAR UNDERSTANDING OF THE POSITION.**

A large, empty rectangular box with a black border, intended for the applicant to append any other documents or specify additional information that would help in understanding their position.

**11. SIGNATURES**

SIGNATURE OF INCUMBENT:	
NAME OF INCUMBENT:	
TELEPHONE NUMBER:	DATE:
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SIGNATURE OF IMMEDIATE SUPERIOR:	
NAME OF IMMEDIATE SUPERIOR:	
TELEPHONE NUMBER:	DATE: