

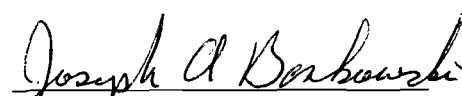
DESIGNING A CUSTOM HOURLY WAGE CLASSIFICATION SYSTEM TOOL TO
BE COMPANY SPECIFIC FOR THE CHEESE COMPANY

by

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ABSTRACT

The goal of this project is intended to address known and/or perceived inequities and inefficiencies with the current evaluation and classification system. Every company has a wage classification system of some sort. The problem lies in the fact that companies do not share the wage classification system or the process of how positions are classified or rated. Employees feel they are left in the dark as to why their position does not make as much money as other areas of the company. If asked, employees seem to feel they are underpaid. It is human nature to want to make more money. However, without the knowledge of the basic classification system employees are lacking in the ability to understand how they can advance throughout the system to benefit themselves.

The purpose of this field project was not only to enlighten the employees about their wage classification system, but to customize it for better understanding

and to assure accurate ratings. Taking it a step further, the goal was to involve them in the customization process, to not only get understanding but buy-in to the fact that the system was accurate and fair to all employees.

The process will include writing outcome-based job descriptions leading to effective job and performance evaluations that will align with the wage classification system. Communication is the key to a successful project. It is critical that every employee understands how their position level was determined. They need to understand that they control their own destiny by moving through the system to increase their wage potential. A clear understanding of the system will give them the ownership it takes to making it happen.

Although this was an actual project, the name of the company has been changed due to trademark and confidentiality reason.

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Chapter I: Introduction

Overview of Study

Compensation is the investment in human resources. Compensation systems are the foundation for attracting, motivating, rewarding, and retaining employees. The system should focus on the skills, knowledge, and attributes desired by an organization for each position. In order to accomplish these goals employees have to perceive the system is fair and equitable to everyone. This can be addressed through four perspectives: external equity, internal equity, individual equity, and process equity.

The Company Culture is based on pride in professional excellence, respect for the rights of employees, and a commitment to strengthen the financial security of all dedicated employees. Every two years a survey was done to get a feel for the temperament of the company population. This survey is reviewed by the Vice President of Human Resources, Vice President of Operations, and the Organizational Development Manager known as the focus review group. There was always the consistent feedback about favoritism, unfair pay practices, and no communication.

As the organization continued to grow, not only geographically, but through increasing numbers and diversity of employees, the need was felt to update the job classification and compensation systems. It was important to create an employee centered process to incorporate valuable employee knowledge and experience.

There are many pieces to this project. On the onset the focus review group needed to understand the positions being evaluated and how the positions were being evaluated.

First, the Organization Development Manager met with a group of employees to determine what knowledge they had of the current compensation system. Also, what exactly did they see as discrepancies to the present system?

Second, the Organizational Development Manager worked with a deemed expert on each position, at each facility, to rewrite a clear and accurate job description. In the past, all job descriptions were written by the department manager with the help of the human resources manager. One complaint was they were too general and did not accurately describe the position.

Third, the Organizational Development Manager and the Compensation Manager researched wage classification systems to understand the logic behind the rating systems. Also, it was crucial to compare what was presently in place and how the wording could be realigned to fit our needs and be understood by all employees.

Fourth, the focus review group developed a new system dealing with four criteria: (1) internal equity or position evaluation, (2) external equity or market analysis, (3) individual equity or performance policy, and (4) process equity or program maintenance.

Fifth, all the positions needed to be reclassified using the new system. This would involve review by employees in the position, in tandem with their manager.

Sixth, a review system based on the position outcome oriented job descriptions needed to be put in place to support the entire process.

Statement of the Problem

Why undertake Project Evolution? The definition of project evolution is the process of changing by degrees. As a result of the increased complexity of the business, the addition of new facilities, the diversity of positions across the facility and processes, the old system no longer fit the needs to continue to grow the company. The original system was setup when the company was a one facility two operations company. For ease of administration in rating new positions when a new facility was purchased the same

name was given to like positions. This has always been a problem with employees who felt they were forced into a box. They felt they were not given the correct ranking.

Purpose of the Study

To develop a compensation system understood by human resources, management, and all employees. These are all non-union facilities and the number one reason unions infiltrate companies is lack of communication and perceived unfairness. The culture at this company commands a people centered organization. It is only right that every employee understands the choices they make when it comes to applying for positions. What impact will it have on their ability to make more money or in some cases less money? But everyone should understand why they make what they make and how they change that outcome.

Research Objectives

The intent of the research project is to:

1. Determine what other companies use to evaluate positions.
2. Identify any new trends in compensation management.
3. Design a creditable people centered compensation and performance system.

Definition of Terms

The following terms are being defined to clarify concepts of the project.

1. External Equity: How positions are valued in comparison to like positions at other organizations. (Mutual of Omaha Benchmarking)
2. Factor Levels: Measures relative value by degrees of compensable factors present in job descriptions compared to a number of degree levels. (HR Guide to the Internet. (1999). *Job Evaluation: Methods: Factors Comparison*. Retrieved on May 2, 2004 from <http://www.hr-guide/data/G413.htm>.)

3. Individual Equity: The extent to which compensation is perceived to be fair among individuals holding the same position. (Mutual of Omaha Benchmarking)
4. Internal Equity: How positions in the organization are valued to each other. (HR Guide to the Internet. (1999). *Job Evaluation: Methods: Point Method*. Retrieved on May 2, 2004 from <http://www.hr-guide/data/G414.htm>.)
5. Position Factor: Identifies which job functions or responsibilities best explains a relative market benchmark for positions internally and externally. (HR Guide to the Internet. (1999). *Job Evaluation: Methods: Classifications*. Retrieved on May 2, 2004 from <http://www.hr-guide/data/G412.htm>.)
6. Outcome Oriented Job Description (OOJD): Who performs what, to what or whom, to produce or accomplish what, using what tools, equipment, or process focusing on knowledge, skills, and abilities. (www.shrm.org)
7. Position Evaluation: Is a systematic approach to analyzing positions by their basic work elements and then ranking them in order of their importance or contribution to the organization. (HR Guide to the Internet. (1999). *Job Evaluation: Methods: Ranking*. Retrieved on May 2, 2004 from <http://www.hr-guide/data/G411.htm>.)
8. Process Equity: The process used to make the compensations system sound by regular reviews and updates to keep current and accurate. (Mutual of Omaha Benchmarking)

Limitations of the Study

The project had complete organizational support, so time and money was not a factor. However, both ordinarily would be a limitation. Each of the outcome orientated position descriptions took at least two hours per position. It was also difficult for each of the facilities to free the person up for this amount of time.

The personal communication of the project was limited because of the number of facilities. It was important to share progress and results step by step. So a monthly news letter was mailed to each employee's home. At the end of the project each facility had two meetings to share the final outcomes of the project and answer any remaining questions. This was very costly and hard to coordinate due to the facilities being 24 hours, 7 days a week facilities.

In summary, money and time would be the biggest limitations for most organizations. If there is not a rush to reach the end of the project it can be done a little at a time.

Summary

This project will be a step by step process for designing a compensation system, with input from all levels of the organization to assure accurate and meaningful data. It starts with what kind of discussion needs to be held before the project starts and ends with the building of the product.

The company culture really needs to support the time needed to build a total customized classifications system. It takes a lot of time and effort for all levels of the organization. Employees are very willing and even get excited about being evolved. But the project takes time and needs a strong facilitator to keep it all on track.

Chapter II: Literature Review

Overview

The intent of this literature review was tri-fold. First, a historical review was necessary to understand where and how position evaluation was developed. Secondly, an analytical study was required to review literature on the building of customized wage and position classification systems. The researcher also wanted to expand knowledge and the ability to move beyond any pre-conceived ideas that were in the present system. Thirdly, the researcher needed to identify other wage and position classifications systems to use as examples benchmarking similarities in the practice itself.

The goal is to customize a wage and position classification system that pays fair, equitable, and competitive wages. To attract, retain, and motivate employees by recognizing the relative values of the various positions, yet to maintain realistic wage ranges.

History Review

It is said that one should always know where one comes from to understand where you are going. So a look back seemed in order. It was imperative for everyone involved to understand the history and need for classification systems. From the beginning there was always a hierarchy for different positions. In the beginning, back in the caveman's world, it was brute strength. As time moved forward to the Wild West days the hierarchy was based on education. Most people could not afford to go on to school so those that did, got the highest paying positions. But it was around 1871, when the U.S. Civil Service Commission of Chicago adopted the first evaluation system. In 1912 the U.S. Civil Service Commission of Chicago went on to developed today what we would consider the modern version of a classification system. (Patton and Smith, 1954) Beginning with the

Classification Act of 1923, federal government employees received a wage based on a grade level of work and class of work. (Figart, Figart, and Power, 2002)

As the industrial age of 1920 occurred, the private business enterprises moved to wage classification system. Four major methods were used: (1) ranking, (2) grade description, (3) factor comparison, and (4) point factor. The easiest of the four is job ranking, by which someone uses their impression of the positions to line them up. This of course could be inherently subjective.

By 1940 the trend was to move to a more rational and scientific method of rating, including factor comparison and point factor systems. In 1911 Frederick Taylor published his work, *The Principles of Scientific Management*. He suggested the four principals of scientific management:

1. Replace rule-of-thumb work methods with methods based on scientific study of the task
2. Scientifically select, train, and develop each worker
3. Cooperate with the workers to ensure the methods are being followed
4. Divide work nearly equally between managers and workers, so managers apply scientific management principles

Frederick Taylor set the pace for looking at work differently. This then lead to a movement of looking more scientifically at the way jobs were being classified.

Merrill R. Lott introduced point factor job evaluation in a 1925 article in *Management and Administration* entitled "Wage Scales with a Reason." A year later he expanded on the topic in a book he wrote, *Wage Scales and Job Evaluation*. The same year, 1926, Benge modified the point factor scheme, originating the factor comparison method. (Figart, Figart, and Power, 2002)

For most human resource specialists today the most popular method of rating positions is the Hay method. Edward N. Hay developed the most widely used “canned” off-the-shelf system, the Hay Guide Chart-Profile Method and marketed it through a consulting firm that even today bears his name. Here is how it works: Select job attributes that are valuable to the organization. These are referred to as compensable factors. The most common categories of compensable factors are (1) *skill*, including years of education and training required in place of education, (2) *effort*, primarily physical, (3) *responsibility*, for machinery, money, or people, and (4) *working conditions*, or what might be referred to as compensating differentials. The relative weight is determined by a range of points that can be accumulated for each factor. Usually skill is weighted the highest.

The next step is detailed job descriptions created by interviews and manager feedback. The last step is to assign a wage rate using a salary scale related to specific points or range of points.

The focus review group had the opportunity to review the Mutual of Omaha Insurance Company’s job evaluation process on a benchmarking visit. They use the Hay system. They have customized the system to be understood by their company. The factors and levels are:

1. Know-How (Technical-8 levels, Managerial-8 levels, and Human Relations-3 levels)
2. Problem Solving (Thinking Environment-8 levels, Thinking Challenge-5 levels)
3. Accountability (Freedom to Act-9 levels, Magnitude-6 levels, Impact on End Results-4 levels)
4. Working Conditions (Physical Effort-4 levels, Environment-5 levels, Hazards-3 levels)

Mutual of Omaha uses a questionnaire and manager feedback to rate the factors and levels. The Hay system has not changed but has become more versatile over the years to fit the needs of all kinds of organizations.

According to labor economist Herbert R. Northrup: “Job evaluation was used by management partly to deter or prevent unionization, partly to rationalize its wage scales prior to unionization....and partly to stabilize the wage structure and eliminated continuous bargaining over particular rates after unionization” (Hutner, 1986).

In summary, wage and position evaluation has been around for a long time. It has proven the test of time and can be customized and understood easily.

Analytic Studies

The purpose of this section is to provide additional guides to building a customized system. Looking at best practices helps build an understanding of what needs to be accomplished with design, development, and use of the position evaluations.

In the book, *Job Evaluation: A Guide to Achieving Equal Pay* (Armstrong, Cummins, Wood, and Hastings, 2003) it sites the need to evaluate the following criteria to accomplish the project:

- ◇ simplicity versus detailed and complicated
- ◇ cost and time constraints
- ◇ minimizing administration
- ◇ extent to which the organization is comfortable with, or wants to avoid, ongoing reliance on external support
- ◇ whether computer support is needed
- ◇ what is needed to defend the outcome
- ◇ how position evaluation will be used to support pay reviews

- ◇ the organization's history of position evaluation: is the past point system likely to have a different perspective from the new one
- ◇ how the 'unique' characteristics of the organization will be taken into account
- ◇ potential for links to human resources policies

Using the above criteria the executive group of the organization needed to decide how to proceed with the project. After the decision is made to proceed, the organization should have representatives at the manager level and the workforce again reviews the questions. A comparison of the executive group and the additional review group should be compared for any difference or concerns. This will give credence to the outcome of the questionnaire. The last thing you want is to have a surprise after the project is underway.

After the decision is made to proceed, there are three basic choices. The first choice is proprietary schemes developed by consultants, applying standard factors and scoring models. The second choice is a customized scheme, based on an existing scheme, but adapted to address the organization's needs. The last choice is tailor-made schemes, developed in-house with the aid of an advisor. (Table 1, shows pros and cons of each system)

The last piece is to develop the plan. Who will be covered? Who will be involved? What resources will be needed? How can the findings be communicated? When will it all happen using a design timetable? This was one of the most comprehensive books on developing a wage and position evaluation. It provided the basis for the project.

(Armstrong, et al, 2003)

Most Human Resource Professionals belong to the Society for Human Resource Management or SHRM. SHRM members have access to a number of resources on-line

and a review of the information available has produced the following information.

(Flowchart of a Compensation System. (n. d.) Retrieved February 14, 2001 from <http://my.shrm.org/whitepapers/comptoolkit/default.asp>)

A flowchart of a Wage Evaluation and Compensation System (SHRM) outlining the process:

◇ Position Analysis Methods

- Observation, watching employees perform their job
- Interview, face-to-face discussion about skills, abilities, and knowledge needed to perform their job
- Questionnaire, job incumbents and their managers fill out forms with the information needed
- Position Analysis Questionnaire, a checklist that analyzes 187 elements of a position
- Outcome Oriented Position Job Descriptions, descriptions based on knowledge, skill, and abilities

◇ Job Evaluation Methods

- Ranking, fastest and easiest, also inexpensive
- Classification, easy to understand, well accepted by employees, easy to modify as duties change
- Point Factor, reasonable objective results, best for organization that want a system for evaluating positions
- Market Based, focus is on external equity, heavy reliance on survey data

◇ Comparison of Base Pay Systems to go with Position Evaluation System

- Flat-rate System, best for routine, simple jobs that offer little opportunity to vary performance
- Time-based System, best for routine jobs where competency level increases with time
- Performance-based System, best used when individual performance is valued and accurately measured
- Productivity-based Pay, best when quantity of work is accurately measured, encourages high level of productivity
- Competency or Skill-based Pay, best where skill/knowledge levels are well defined and employee development is valued

SHRM has supporting information for each of the listed different areas. It also has information for comparison of base pay systems and how to get market pricing.

A review of the HR Guide to the Internet (Retrieved from hr-guide.com) gave a overview of four areas of job evaluation. (1) Job Evaluation: Methods: Classification, (2) Job Evaluation: Methods: Ranking, (3) Job Evaluation: Methods: Point Method and finally (4) Job Evaluation: Methods: Factor Comparison.

Lastly, an article by Lohse & Gilman, (2004) Mastering a Top-down Approach to Reviewing Jobs: *Workspan* p39 designates the benefits of defining position families are varied. It could be used to create career paths for employees and promotional requirements. The regulatory compliance is yet another benefit of the job review process needed to complete this project. It will also create a wage and position evaluation system that should last well into the future.

Alternative Evaluation Models

The last piece of research collected was two different models of position evaluations systems. The first was The National Position Evaluation Plan by the Management Associations of America (1991). The model included definitions of factors and respective degrees used in evaluating manufacturing, maintenance, warehousing and service positions. The manual is offered by the organization with the implementation being done using their services. It gives a foundation for points assigned to factors and ranges for grades. It defines the factors and degrees for knowledge, experience, initiative and ingenuity, physical demand, mental attention, visual demand, responsibility for equipment and process, responsibility for material or products, safety, and lastly working conditions.

This piece of information was the closest to the hourly group involved in the project.

To give a comparison model, a Factor Evaluation System from the University of Rhode Island, (2003) was also used to give a different view of possible factors. The factors addressed in this model were: knowledge required, supervisory controls, guidelines needed, complexity, personal contacts, physical demands, and finally work environment.

Using these models gave a good start to determine the factors that could be used in the project. They say do not re-invent the wheel, the models give us a hub to build on.

Chapter III: Methodology of Outcome Oriented Job Descriptions

Project Selection

The purpose of this project was to customize the hourly wage classification system tool to be company specific and in-line with the mission and culture. It needed to be credible with employees, externally benchmarked and to meet future changes in the organization. The project was driven from repeated bi-yearly company survey results. There was a continued discontent with what was considered favoritism and unfair pay practices. Everyone felt they were pigeon holed into a box that gave them only limited advancement and wage potential.

The company culture stated very clearly a commitment to strengthen the financial security of all dedicated employees. Along with the survey results, the commitment to live up to the desired culture, there was also a union campaign going on at a competitor. If the employees felt strongly that we were not walking the talk, then a union threat was eminent for us as well.

The original discussion on the project was held between the Vice President of Human Resources, the Vice President of Operations, the Compensation and Benefits Manager, the Hourly Human Resources Manager, and facilitated by the Organizational Development Manager. This group from here on out would be known as the Core Group. The core group used the list of criteria questions and issues from the Literature Review section on page nine. At first the thought was to conduct a focus group of employees to better understand the issues. Although this was done, it was decided to first make sure we had a commitment from the organization leaders. The worst thing was to ask about something if there was not a full commitment to do something.

One of the criteria decided on was to have an outside consultant to give feedback

and bounce ideas off along the process. This person, however, was a consultant to the core group leading the project, not actively involved in the project. There are many consultants to help with this process. It is important to find one that understands the mission of the project and the culture of the company. The interview should address the same criteria and questions that the core group used. This process will give you a good idea if the consultant is aligned with your company.

After the first group met, the second meeting was with all the manufacturing plant managers. The manufacturing group consisted of the plant managers from four cheese producing plants, two whey producing plants, one processing plant, and one distribution center. The consultant was asked to this meeting to get the overall pulse of the leadership group of the plants, and detect any concerns not previously addressed.

The meeting reviewed the on-going discontent highlighted in the survey results. The bonus for all manufacturing leaders has a component related to survey results. Addressing these concerns was a focus that directly benefited each one of them. This project was a huge undertaking for each of them. It required a commitment from them to free up the needed resources during the project. The following facts were addressed at this meeting:

1. Background
 - a. 105 presently listed job descriptions with no clarity
 - b. 8 facilities
 - c. No clear career outline
 - d. Archaic rules governing movement
 - e. Labor intensive jobs

2. Objective
 - a. Develop a clear and accurate position descriptions
 - b. Create a position classification that is fair and easy to understand
 - c. Communicate system and secure understanding
 - d. Align compensation with classification system
 - e. Provide fair governance and job movement guides
 - f. Create a meaningful and fair performance evaluation process
3. Process (Employee Involvement is Key)
 - a. Re-write outcome oriented position descriptions done by job experts in position
 - b. Create company specific job factors with input from committee
 - c. Create company specific factor levels with input from committee
 - d. Re-grade all positions with review for area managers and employees
 - e. Communicate, communicate, communicate
4. Review of the criteria covered by the core group to again look for stumbling stones
5. Questions or concerns

The meeting took a day to address all questions and concerns. The day ended with a commitment to the project from the entire leadership of the organization.

Subject Selection and Focus Group Discussion

It was now time for the focus group. The following was posted at all facilities to attract participation. These meetings were held over lunch to create an atmosphere conducive to participation. (See Figure 1)

Figure 1: Focus Group

OPPORTUNITY TO GET INVOLVED

The Cheese Company is looking for volunteers to participate in a focus group to discuss the hourly wage classification system. The focus group will be no more than six employees from each location. Preferable different positions and varied length of service will be used as criteria for selection of the focus group. The meeting will be one hour long, to be held at each of the facilities. The feedback and suggestions from the meeting will be given to the Job Factor Committee (individuals selected from each location to review job descriptions and assigned classification points), to be used for Project Evolution. Feedback will be given in writing to the Committee; however, who gave the feedback will not be identified. If clarification is needed on any feedback, the focus group facilitator will get the clarification for the Committee.

Project Evolution

“The Process of Changing By Degrees”

Project Evolution is being undertaken to clarify for all employees;

- ❖ the job descriptions being classified are current and accurate,
- ❖ how positions are classified using the job description,
- ❖ how the rate of pay is assigned to the different classifications,
- ❖ when and why positions should be re-evaluated.

The following questions will be addressed by the focus group.

1. Do you understand the present job classification system?
2. Do you perceive the present job classification system as being fair?
3. Has the job classification system ever been explained?
4. What factors should be considered vital in classifying hourly positions?

Your participation in this study is entirely voluntary. You may choose to participate without any adverse consequences to you. Should you choose to participate and later wish to withdraw from the study, you may discontinue your participation without incurring adverse consequences. The purpose of this study is to learn the current knowledge level of the present wage classification system. No personal information will be needed or asked during this interview.

Note: Questions or concerns about the research study should be addressed to Cathy Van Deurzen, at 920-269-1465, or Joe Benkowski, at (715) 232-5266 UW Stout, or Sue Foxwell at 715-232-1126. Questions about the rights of research subjects can be addressed to Sue Foxwell, Human Protection Administrator, UW Stout Institutional Review Board for the Protection of Human Subjects in Research, 11 Harvey Hall, Menomonie, WI 54751, phone 715-232-1126.

IF NOT NOW, WHEN?

Please sign below if you would like to participate in the focus group.

Data Analysis

The plant managers selected the employees from volunteers based on the criteria that the employee would respond accurately. The employees needed for this focus group were not the leaders but someone who had good insight of their team's level of understanding or lack of understanding. Everyone that attended the meeting was given a handout of the present position classification table. (See: Table 2)

The following feedback was collected:

1. Outside of the department leaders no one had even seen the position classification table.
2. No one had input to their job description and some had not even seen it.
3. No one, not even leaders in the departments, had been given any review on the classification system or how it was used.
4. Depending on where they presently were in the classification system, it seemed to determine their feeling of fairness.
5. Many questions surfaced about how it could be accurate when the Compensations Manager did not really understand their jobs.
6. Many questions referred to how different positions, from different facilities, with a different process could be in the same classification.
7. Everyone agreed the project to involve employees in customizing and rebuilding the classification system was a good idea.
8. No one understood how the wage scale and the classification connected. Because of overlapping ranges a person could go to a different job and classification and not get an increase.

Finally, a short review on factors used to create the current classification system taken from the DCA Stanton Group was presented. As the group was asked to identify factors they felt were essential it became clear this was not the group to accomplish the task. The group was told that on-going communication would keep them up-to-date and the meeting ended.

With the feedback in hand, the core group felt more than ever the project was critical to the future of the company and gave approval to develop a plan of events and a time line.

Project Outline

The plan involved many people throughout the organization. It was distributed to all leaders and posted on all bulletin boards for everyone to view. When putting the timeline into a Gantt chart it became clear, in order to accomplish this project, it would take around a year. The main reason was that everyone on the core team and all employees involved had their own positions and work to do. So the project was done in blocks of time instead of running day after day. The impact to stop the daily routine to just work on this project would have been overwhelming to the organization.

The concerns were it would get put on the back burner and not stay on track. That is why the Gantt chart was so important, it held everyone accountable. The project was also split up to have a different driver for each section. This gave the other core members time to plan around what was currently going on and what they had to accomplish.

Everyone had responsibility for communication.

The outline is as follows. See Figure 2

Figure 2: Steps for Implementation

STRATEGIC GOAL – “Project Evolution”

Develop and Implement a fair and equitable evaluation and classification system for hourly Employees for today and in the future.

Steps for Implementation

This growth and development goal is intended to address known and/or perceived inequities and inefficiencies with the current evaluation and classification system. This process will be led by the names above. Outcome-based job descriptions will be developed leading to effective job and performance evaluations that will eventually lead to a compensation system to support the goal. This project will be introduced in 2003 and will continue through completion.

1. Continuously communicate the system intent and process to Employees involved
 - a. Develop Mission statement and communication materials
 - b. Team Manager Meeting
 - c. Employee Meetings
 - d. Bi-weekly progress meetings with core team
 1. Communication updates
 2. Newsletters sent to employee homes
2. Develop outcome-oriented format for hourly job descriptions
 - a. Identify Employee participants in OJD development process
 - b. Train participants in outcome-oriented job description development
 - c. Collaborate with job experts to develop outcome-oriented job descriptions
 - d. Team Manager, job expert and process facilitator reviews the draft, and then discusses any concerns.
 - e. Plant manager/HR reviews for compliance with format and legal constraints.
3. Form a position evaluation committee including members from the core team as well as all levels of management, and employees. Evaluate new outcome-oriented job descriptions.
 - a. Identify committee participants (This committee should not be too big, but it should be a sampling of the population)
 - b. Form and train committee and set by-laws (This is facilitated by the consultant trained in factor and level development.)
 - c. The evaluation committee lead by the Compensation Manager and the consultant in unison develops important factors to be considered in position evaluation
 - d. Factor and level review and approval process
 - e. The evaluation committee will evaluate all hourly positions by assigning points to each job.

- f. The Core Team and Plant Managers will review the results and provide feedback.
 - g. Committee presents evaluations to Employees (part of the larger communication at a later date).
 - h. Create format for appeal process
 - i. Review Appeals
 - j. Quarterly review of New / Revised OOJDs
4. Develop appropriate performance evaluation forms based on outcome-oriented job descriptions
 - a. Identify expectations of all Employees (individual, job and culture) with Plant Managers, Team Managers and HR
 - b. Identify job specific ongoing responsibilities (taken directly from the outcome-oriented job descriptions)
 - c. Optional – identify expectations for a specific review period (projects, team goals, etc.)
 - d. Provide area for manager to document a growth and development plan
 - e. Develop the evaluation scale and weight based on the relative importance of the item with input from Operations
 - f. Provide training for Operations Management to utilize the system as a performance coaching, mentoring and development tool.
 5. Develop pay ranges based on internal and external competitiveness and appropriate guidelines for the increase process
 - a. Develop compensation structure
 - b. Develop a consistent and fair transition plan to move the performance evaluations and increases from annual to the employee's anniversary date.
 - c. Conduct salary surveys
 6. Implement

Resource Assumptions

- **Who (Participants)** - 1) Core Team, 2) Hourly Employees, 3) Team Managers, 4) Plant Managers, 5) Human Resources
- **When (Time)** – On-going
- **How Much (\$)** - 1) budgeted funds of \$15,000 (consulting fees) and time invested

Performance-Level Definitions

Threshold	Target	Outstanding
Management acceptance of proposed timeline by January	Presentation of evaluations to Management by July	Successful Implementation of all Steps as described above by January the following year

It was now time to begin!

Outcome Oriented Job Descriptions

To start, you need to identify who is going to write the job description. After it is written it should be reviewed by a second employee to verify the accuracy and that nothing was left out. Every plant manager needed to identify someone for each position. The criteria given for the selection was:

- ◇ Who would you want to make a “Carbon Copy” of as the standard for each position?
- ◇ The employee can be anyone you feel is qualified. The person does not need to be in the position today.
- ◇ If you could pick your own “Team” of employees, who do you feel would be the most skilled, knowledgeable and best perform the position?
- ◇ Who would make suggestions for improvements on performance for the future?

It did not take long and everyone was identified. The next step was to write each of the people identified a letter congratulating them on being selected. The letter further stated that the management staff at their facility believed they were the employee with the most detailed and insightful knowledge of their position. We asked the following three requirements: first, attend one initial training and orientation session of no more than 30 minutes; second, give a week or two of thoughtful considerations as to what the desired outcomes are for your position; and third, attend one small group job description development session of no more than two hours. They were told the Organizational Development Manager would be their guide.

The agenda for the first meeting was as follows in Figure 3.

Figure 3: Agenda

AGENDA

OUTCOME ORIENTED JOB DESCRIPTION

REVIEW PRESENT JOB DESCRIPTION

- Delete all tasks that are no longer part of the position.
- On back of the Job Description write any new responsibilities that have been added to your position.

REVIEW SAMPLE JOB DESCRIPTION

- Compare the different style

REVIEW THE BLANK FORMS FOR THE NEW FORMAT

- We will fill this out together in the next session

REVIEW KNOWLEDGE, SKILLS, AND ABILITIES HANDOUT

- Fill out before we do OOJD

REVIEW THE EDUCATION, LAUGUAGE, MATH, & REASONING HANDOUT

- Fill out before we do OOJD

QUESTIONS?

At this meeting old job descriptions were handed out along with the following information to aid in writing the new description. The first piece of information reviewed was the instructions on what should be included in the new job description. It is a simple overview. The format is used best in an hourly job description. Salary job descriptions normally are based on responsibilities and are not as task driven. Remember the jobs being written here are very manual jobs. There are employees running equipment and making decisions but even those employees still perform a lot of manual labor. This process is meant to have them compare what they are producing compared to what they should be producing. What is a good product and what could go wrong. See Figure 4

Figure 4: Instructions

Outcome Oriented Job Descriptions

OOJD is done by a job expert in the following manner.

Duties and task statements are written so that each shows:

1. What the worker (Who) does, by using a specific action verb that introduces the task statement.(Performs what action)
2. To whom or what is done, by stating the object of the verb (To whom or what)
3. What is produced or accomplished, by expressing the expected output of the action (To produce what)
4. What materials, tools, procedures, or equipment are used (Using what)

Job is reviewed by Team Manager or other experts for confirmation on completeness.

Job elements to consider:

Information Input / Output: where and how you get or give information needed to perform job, recording information, enters data, or diagrams.

Mental Processes: the reasoning, decision making, planning, and information processing activities involved in performing the job.

Work Output: the physical activities, tools, and devices, used by the person to perform the job.

Relationship with other employees: who do you interact with and on what level?

Job Context: the physical and social context where the work is performed.

Other Job Characteristics: anything else.

*** When writing the outcome statement it may help to think about what could go wrong if that action isn't done. "THEN" what do you know, or outcome do you see, to assure it is going RIGHT!

The example of an OOJD position description in Figure five is the entry level position in the company. The position is processing cheese, separating whey from curd by hand in large vats. It is very physical and is performed by a team of four at a time. There are many vats of cheese going at one time, all at different stages. Each vat has a group of four working on it. This group works ten hours a day and rotates days of the week, never working more than four days in a row. The position is 99.9 % held by men due to the physical nature of the job. See Figure 5

Figure 5: Sample

DRAFT JOB DESCRIPTION: AS AN EXAMPLE

It may be helpful to compare this to the existing job description. Note in this job description the use of the expressions “in order to” and “by” used to provide a link between tasks that you are engaged in and the outcomes that are being achieved. In making the task outcome conversion it can also be helpful to ask the question, “What are we trying to accomplish and why do we want the employee to perform that task?”

THE CHEESE COMPANY

JOB DESCRIPTION

Job Title: Curd Processing
 Job Code: 204
 DOT Code: 529686050
 Department: Curd Processing
 Division: Operations
 Reports To: Team Manager
 Prepared By: The Three Musketeers
 Approved By: XXXX
 Revised: 3/8/04
 Salary Level Pay Grade X

SUMMARY (*The attempt here is to state the summary in terms of what is accomplished.*)
 Process curd from the make vats and transfer matted curd, meeting set criteria, to the MMM departments.

ESSENTIAL OUTCOMES AND RESPONSIBILITIES:

1. OLD - All other duties as assigned.
Verses
2. NEW - Achieve other outcomes as necessary to meet organizational needs.

Conversion from duties to outcomes is the goal. The old statement went from “as assigned” to “as necessary to meet organizational needs” in order to focus the employee not just on what they have been told to do but, to proactively do what they can see needs done.

In the identification of outcomes, terms like “at desired levels” are used instead of including specific numbers or levels in order to maintain confidentiality and reduce concerns if the job descriptions became public.

1. Maintain proper hygiene and adhere to all GMPs to assure the safety of the cheese.
2. Learn the operation of table setup and unloading equipment to assure a safe and consistent process.
3. Ditch the table and draw the whey in order to achieve desired whey removal times and proper curd compaction.
4. Perform the cut, stack, and matting of the curd piles to achieve uniform curd piles and eliminate cheese crumb waste.
5. Flip and turn the curd piles in the proper timeframe to achieve the desired cheese ripening.
6. Achieve a final curd pH at the MMM area by cutting and removing cheese at the proper make time.
7. Test whey to verify proper TA level and pass information to proper channel.

8. Achieve the targeted curd moisture level by making the appropriate adjustments to cutting and stacking.
9. Consistently deliver cheese slabs of specified size to the MMM department.
10. Provide accurate vat segregation to MMM department.
11. Rotate and perform successfully other jobs as needed to support time off, training etc.
12. Deliver work area to sanitation in a condition that meets predetermined standards.
13. Help achieve a culture that is supportive of employee's growth and involvement to make The Cheese Company a great place to work.
14. Help achieve a safe and hazard free workplace while following all safety policies and procedures.
15. Generate and communicate ideas that help enhance the profitability of organization.

END

Also See Appendix A: Outcome Oriented Job Description Example 2

At the end of the job description the physical requirements needed for this position will be added. One of the factors for the position evaluation is Physical Requirements and Environmental. The company had a professional physical therapist (from the clinic that performed the pre-hire physicals) come in and evaluate each position based on the same criteria across all locations. The results were charted and are shown later in this paper.

See Table 3 & 4

As long as there was the exposure to the job experts, they also filled out two other forms that needed to be completed for the job factor review. First, a form addressing the knowledge, skills, and abilities needed to perform their job. The employee needed to actually write out what they felt applied in each of these categories. Again, they were helped by the Organizational Development Manager. See Appendix B The second form was related to education, language, mathematical, and reasoning levels needed to perform the job. See Appendix C and Table 5

There will be more about both these forms under the evaluation process. Both of these forms, just like the physical requirements form, will stay with the job description once completed.

Lastly, they were given a blank form to use to actually write their outcome oriented job description. See Figure 6

Figure 6: OOJD Blank Form

Job Title (Who): _____ **Date:** _____

Job Description Expert: _____ **Job Description Approval:** _____

Present Classification: _____ **Position Reports To:** _____

Summary of Position: *Brief 2 to 3 Sentence Description of the job.*

Outcome Oriented Job Description: ***H=Hourly D=Daily W=Weekly M=Monthly Y=Yearly

Performs/Does What Action? (Verb)	To What or Whom? (Object of Verb)	To Produce/Accomplish (For) What? (Expected Outcome)	Using What Tools, Equipment or With What Process?	***HOW OFTEN?
EXAMPLES:				
1 Maintain and adhere	proper hygiene and GMP's	to assure the safety of the cheese	by wearing the hair protection, clean clothes and washing hands correctly.	
2 Rotate into and perform	other jobs	to support time off, training, etc.	by learning various equipment and procedures.	

With all the tools in hand the Outcome Oriented Job Descriptions were built; one job at a time, one facility at a time, and one expert at a time. Everyone involved was excited and proud to participate. They wanted everyone to understand what they did and how they did it. The design is easy enough for everyone to understand and they were writing quickly.

Limitations to OOJD

The obvious limitation was scheduling the employees to have three hours total to produce the outcome oriented job descriptions. In some cases it took longer for some than others. If they were expected to be on the production floor, it could cause some overtime while someone filled in their spot.

Writing skills were also a limitation for some of the employees. In this case the researcher did the writing or had them use a computer. Everyone seemed to be comfortable with allowing someone else to write for them.

Because it was easier and quicker for the employees to write the OOJDs someone needed to type them. The typing took up additional time for an administrative assistant and sometimes it was hard to read the writing.

However, the typed descriptions were easier for the second expert to read and to make comments. It then made it also easier to update. By the time it got to the manager the file could be e-mailed back and forth for corrections.

Chapter IV: Building and Applying Position Factors

Information Analysis

Experts from each position participated in filling out all new information about their job and the information was then collected. After that was completed a second employee in the same position was asked to review the information and give feedback. The third person to look at the information was the Area Manager who reviewed their area information with the plant manager. Finally, all outcome oriented job descriptions were put into a binder. The binders were placed in an area for all employees to review. All the positions were in the binder so anyone could see any of the descriptions. This had a tri-fold purpose. First, it was to get even more feedback if something was missed. Second, it would add to career choices as employees had their performance reviews. It laid the foundation for discussion between the employee and their manager. And third, if the position had changes, in the future employees could pull their job description and note the changes and have it updated.

One of the driving factors behind this project was that the company started with just one facility. As it grew, the job descriptions from the first facility were used for all similar positions in the new facilities. In every case the job descriptions covered some of the areas of the job, but it also left out many details to the specifics of each job. This had always left the additional facilities employees feeling slighted.

The goal was to be comprehensive in doing the job descriptions and gather all needed information. This resulted in an increase of the number of job descriptions.

1. Current System – 52 Descriptions
 - a. Old job descriptions including general physical abilities
 - b. Current classification matrix

- c. Current factors and level
2. Customized System – 110 Descriptions
 - a. New outcome oriented job descriptions
 - b. New physical outlines and added environmental information
 - c. Knowledge, skills, and abilities information
 - d. Education, language, mathematical, and reasoning levels
 3. Other Models (A model is not right or wrong, it is just a model.)
 - a. Old factor system – DCA Stanton
 - b. The National Position Evaluation Plan (MAA)
 - c. Mutual of Omaha Example
 - d. Book Job Evaluation: *A Guide to Achieving Equal Pay*
 - e. University of Rhode Islands: *The Factor Evaluation System*

The information was given to the job evaluation committee to start building and evaluating positions.

Position Factor Criteria

The evaluation committee included the compensation manager, one employee from each facility, one plant manager, one area manager, the hourly human resource manager, and the consultant. The first meeting was with the evaluation team and the entire core team. It was important to show executive support and let them know they would have any resources necessary for the completion of the project.

The Vice President gave an overview of the reasons behind the project and the outline of the project. The Compensation Manager gave an overview of how positions were graded in the past. The team introduced themselves and gave an overview of their work history. The first piece of business was to establish meeting times and dates.

A code of conduct was established for the group, including rules like: everyone's opinion will be heard, employees will seek input from other employees, a consensus of the team will need to be made for a decision, and there is no dumb question.

The group went over the basics of a position evaluation scale. Fundamental to the evaluation process is the tool by which the positions are evaluated. This tool must be developed using certain criteria, if the evaluation is to result in valid position rankings. A position evaluation scale must incorporate the following characteristics:

1. General requirements of a Rating Scale
 - a. Cover those major characteristics of the positions to be evaluated.
 - b. Provide an accurate measure of all essential facts pertaining to the characteristics.
 - c. Be simple as possible.
 - d. Make possible an evaluation of the positions which conforms with the monetary evaluation of the position against the external market.
2. Criteria for selection of Rating Factors
 - a. Must have components which are appropriate for rating the cross section of positions.
 - b. Must be mutually exclusive to our culture.
 - c. Must reflect differences in the requirements and characteristics of the positions.
 - d. Must be subject to quantitative measurements.
3. Selection of factor levels
 - a. Be of equal breadth and scope to facilitate the assigning of points in a definite mathematical procedure.

- b. Be arranged within each factor in a definite geometric progression of values, from lowest to highest.
- c. Be sufficient in numbering any one factor to cover the entire possible range on the factor.
- d. Be equal in numbering each factor throughout the scale. Definitions can be adjusted to have the same number of levels on each factor.

4. Factor Weighting

- a. The weight given each factor is of vital importance if the results are to be valid.
- b. Each factor needs to be weighted against the other factor; example responsibility = 35% to 40%, effort = 15% to 20%, Skill = 35% to 40%, working conditions – 8% to 12%; each of the factors could fall into one of these categories.
- c. Each factor needs a level progression and the levels should be in a geometric relationship and generally follow a series like:
1,3,7,15,31,63,127,255,511,1023.

5. Test of Acceptability – in the final analysis, the position evaluation must pass two

tests:

- a. Validity – The results are logical, reflect market conditions, and appropriately group positions into grades or series.
- b. Reliability – All competent position analysts arrive at relatively the same results.

The classifications must form a mathematical series. This series is then used by the compensation manager to develop grades of pay. A person with a statistics background would be best suited to develop the weights and measures.

Factor Selection Process

The group brainstormed ideas for factors. The first factor mentioned, of course, was physical requirements. This was not surprising due to the fact that just about all the positions are very physical. This was the list:

1. Physical Requirements – lifting, monotonous repetitive motion
2. Working Environment – noise, cold/heat, hazard exposure, safety equipment
3. Education, Knowledge, Experience, Certifications – at what level of education are the positions
4. Mechanical and Technical Aptitude – how involved in the equipment upkeep or routine maintenance
5. Impact on Quality – what control do you have on end product
6. Decision Making – impact on organization, prioritizing of work flow, initiative, ingenuity
7. Know How – technical, managerial, employee relations
8. Accountability, Leadership – impact on other employees, organization, leadership of other employees
9. Breath of Process Influenced – position that affect the outcome of product, amount, quality, flow of process
10. Customer Contact – internal, external, interactions, interpersonal skills
11. Problem Solving – guided or unguided

The brainstormed ideas generated a lot of discussion. The discussion centered on what is important to the organization. There is always a focus on quality but job knowledge and decision making are critical to quality. Also, quality is preached to be top priority for everyone in the organization. It was determined quality was an outcome of other factors, not necessarily a factor by itself.

The next step was to determine order of importance of each factor to the organization. The hierarchy promoted more discussion on the chosen factors and it appeared a number of factors were similar and could be combined. The following is the order of importance to the organization and the weighting of factors:

Scope of Process Accountability, 30%

Job Knowledge, Experience, 20%

Mechanical, Technical, 20%

Decision Making, Problem Solving, 15%

Customer Interaction, 10%

Physical Requirements/Environment Requirements, 5%

As the factors were ordered and weighted, the discussion on customer interaction became an issue. Again the culture dictates that the internal customer, who is anyone in any other department, was just as important as the external customer. Again to recap, this classification system is for the hourly population. There is very little, if any, external customer contact. The product produced is sold to distributors and then to the end user. The sales force deals with the distributors and because of confidentiality issues the distributors are not allowed in the facilities.

The discussion concluded that internal customer service is important but not at the level of external customer service. So it is important to have it as a factor but the lower rating was appropriate.

Defining Evaluation Factors

The next step was to define, in detail, what each factor meant and how many levels were in each factor. This took many meetings and rewrites to come to a consensus of the final product. First each factor was defined as follows:

Scope of Process:

This factor evaluates the influence on the outcome of the product. It affects the quality of the final product, quantity of produced, and the process flow.

Job Knowledge, Experience Requirements:

This factor evaluates the level of knowledge employees must understand to do acceptable work. It includes experience required to perform the job and the number of processes that the position influences.

Mechanical and Technical Requirements:

This factor evaluates the mechanical and technical requirements of the position.

Decision Making and Problem Solving:

This factor measures the independent action, use of judgment, making of decisions and the amount of resourcefulness that is required.

Customer Interaction:

This factor evaluates the interpersonal skills required to interact with internal and external customers, and the amount of dependence on strong communication skills to carry out the responsibilities of the position.

Physical Requirements:

This factor considers the physical exertion required for the job and evaluates the physical atmosphere of the position.

Once the factors were defined it was determined to keep all levels to four making it easier to define point levels. Again, I would recommend you have a person with a statistical background define the point levels. In this project the points were defined as closely as possible but are not statistically sound. If the spread is not correct it will result in clustering of points for jobs. You will not be able to clearly define break points needed for grade levels. It took a few reviews of the available models and a few tries to come close to the levels used in this project. In the end, the levels and points assigned to each level provided a good point spread for grading of the positions. The final points assigned to levels were done by the Compensation Manager, the Hourly Human Resource Manager and the consultant. The assignment of points to levels was not an area of understanding for the employee group, and they were happy not to be involved.

Although the committee was used to identify factors the final selections needed to be accepted by the core team. The presentation of the factors to the core team was done by the entire factor selection team. This allows for the core team to ask questions and get definitions behind the factors. It really helped to get clarification for the employees that work the positions. They were able to give examples of the different factors in different positions.

The following are the six factors, levels and points assigned to each level. It did not take long to identify the levels. The employee team working on the project was a good cross selection of employees holding different positions. They all were from different locations as well. This gave good clarification to any questions about the seemingly like

position at different locations. The group was dismissed with a celebration of success.

The celebration for this group was a night out to dinner. Here are the factors, levels, and points:

Scope of Process (Total Possible Points = 247)

This factor evaluates the influence on the outcome of the product. It affects the quality of the final product, quantity of produced, and the process flow. This factor also speaks to the leadership it takes to run the different processes.

Level One (30) - Limited potential to enhance quality, primary focus is on avoiding deterioration of quality. There are a limited number of control points and limited potential for errors to impact quality of final product without errors being correctable by employees in other jobs. No input into quantity produced or process flow.

Level Two (61) - Some potential to enhance quality, not just avoid deterioration of quality. Some control points with some potential for errors to impact quality of final product without errors being correctable by associates in other jobs. Has some impact on quantity of product by affecting the process flow.

Level Three (123) - Significant potential to enhance quality, not just avoid deterioration of quality. Controls a larger number of control points and has significant potential for errors to impact quality of final product.

Level Four (247) – Sets quality levels through scientific measures and adjusts process accordingly. Is responsible for entire processes and makes decisions that affect quantity and process flow. At this level the employee, having developed expertise in process, is responsible for resolving problems. It could be by giving directions to other employees.

Job Knowledge, Experience Requirements (Total Possible Points = 167)

This factor evaluates the level of knowledge employees must understand to do acceptable work. It includes experience required to perform the job and the number of processes that the position influences.

Level One (20) - Knowledge of simple, routine, or repetitive tasks or operations, which typically include following step-by-step instructions or operation of simple equipment, and require limited or no previous training or experience. Knowledge of basic or commonly used standards and procedures of operation are used.

Level Two (41) - Knowledge of multiple sets of standards or operations requiring training and experience to perform the full ranges of assignments and resolve recurring problems. Requires training and experience to operate and adjust multipliable types

of equipment for the purpose of performing standardized tests or operations. Directly influences the success of at least two processes.

Level Three (83) - Knowledge of an extensive body of rules, procedures or operations requiring extended training and experience to perform a wide variety of interrelated or nonstandard procedures in a technical field, requiring extended training or experience. Or, directly influences the success of three or four processes.

Level Four (167) - Knowledge of a field of study sufficient to support development of new procedures, methods and or processes. Or, directly influences the success of more than four processes.

Examples of processes are: intake, milk equipment, mix mill mold, curd processing, brine/packaging, warehousing, waste treatment, whey packaging, shipping and receiving, transportation.

A review of the results for Appendix B: Knowledge, Skills, and Abilities Designation Form would be of great value here. Also check the result from: Appendix C: Education, Language, Mathematical, and Reasoning Review Form Table 5: Results for Education, Language, Mathematical, and Reasoning Review

Mechanical and Technical Requirements (Total Possible Points = 167)

This factor evaluates the mechanical and technical requirements of the position

Level One (20) - Ability to start up equipment, run equipment, and monitor product for equipment defects. Ability to disassemble and reassemble equipment for cleaning.

Level Two – (41) - Ability to monitor and adjust equipment, ability to disassemble and reassemble simple equipment for cleaning and perform routine maintenance. Equipment may require employees to hold a license or test to run equipment. (Pasteurizer license)

Level Three (83) - Ability to diagnose and make simple repairs to equipment that may require employees to hold a license that requires a short course and a test. Ability for an employee to disassemble and reassemble complex equipment for routine maintenance or cleaning.

Level Four (167) - Ability to diagnose problems and make complex repairs. Ability to fabricate equipment, read blue prints, and order necessary parts for equipment. Requires one year or more of schooling in Mechanical, Electro-Mechanical, or Industrial Electrician, and has five or more years of experience.

Decision Making and Problem Solving (Total Possible Points =126)

This factor measures the independent action, use of judgment, making of decisions, and the amount of resourcefulness that is required.

Level One (15) – Use of little judgment to follow instructions; use of simple equipment in performing duties with little or no choice as to the procedures used in achieving results.

Level Two (31) – Use of some judgment to comply with instructions, prescribed routines, methods or practices to respond to preset conditions involving the making of minor decisions.

Level Three (63) – Use of some judgment to plan, perform, and make decisions as to the sequence of set-ups, operations and process, including minor modification and identify adjustments needed.

Level Four (126) – Use of considerable judgment to plan and perform unexpected conditions at work where only general methods are available, and in making broad decisions, involving considerable initiative and ingenuity.

Customer Interaction (Total Possible Points = 87)

This factor evaluates the interpersonal skills required to interact with internal and external customers, and the amount of dependence on strong communication skills to carry out the responsibilities of the position.

Level one (10) - Occasionally giving or receiving information.

Level two (21) - Regularly giving or receiving information, or occasionally collaborating to reach decisions.

Level three (43) - Constantly giving or receiving information, or regularly collaborating to reach Decisions or participates in personnel decision making.

Level four (87) - Constantly collaborating to reach decisions.

Physical Requirements (Total Possible Points = 47)

This factor considers the physical exertion required for the job and evaluates the physical atmosphere of the position.

Level one (5) - Jobs requiring the least physical exertion and a comfortable work environment.

Level two (11) - Jobs requiring moderate physical exertion or jobs requiring spending minimal time in the most adverse environments or most of the time in moderately adverse environments.

Level three (23) - Physically demanding jobs that require high level but less than constant physical exertion, and requires spending significant amounts of time in the most adverse environments.

Level four (47) - The most physically demanding jobs and jobs that require spending most of their time in the most adverse environments.

The following two references can be used to fill out the Physical/Environmental Levels (1) Table 4: Physical Levels (2) Table 3: Environment Conditions will be used to fill out this section.

Position Evaluation

The final product was given to the Compensation Manager to do the evaluations. The Compensation Manager, Plant Manager, and the Area Manager from the factor building team did the evaluations. After the evaluations were finished the spreadsheet of positions and the points, along with the factor sheet with levels, was given to the core team and all plant managers for review. Each plant manager held meetings with their area managers to review the information. All questions were documented and a response was written to all questions and sent to all plant managers.

The project was handed off to the Compensation Manager for grade level assignment and to attach wage ranges.

Lastly, there should be an appeals process setup to maintain the validity of the evaluation. This appeals process will be company specific. It should involve an employee from the position being evaluated and the area manager.

Program Maintenance

Keeping the program up-to-date is essential. Position description review should be part of the annual performance review to get first hand feedback to changes in positions.

Updates to the position should be formally rewritten and the evaluation process conducted for that description. Also, annually the factors should be reviewed by the plant managers for validation.

Chapter V: Result and Discussion

Benefits

Position evaluation is the cornerstone to a formal wage program. Without realistically determining a relative position's worth, in some specific and reasonable manner, it would be difficult to establish a formal program. Specifically, the position evaluation process plays a key role in salary administration in the following way:

1. Position evaluation is the most effective means of determining internal pay relationships.
2. Position evaluation can be used as an instrument for supporting the organization's basic pay policies.
3. Position evaluation provides a reasonable basis for personnel movement.
4. Position evaluations provide a realistic foundation for gearing division pay scales to those of competing companies.
5. Position evaluation assists managers in meeting day-to-day problems. This in turn contributes to reduction of employee grievances, to higher morale and less turnover.

Limitations

The key limitation is the time and money it takes to accomplish this project. It is a project that can easily get side tracked without a commitment from the Executive Group of the organization. An organization also needs an organizational development person to drive and facilitate the process.

The consulting cost can be minimal. The key is to find someone who understands the culture of your organization. This person is not designated to take the project, just advises the project team.

Conclusion

The results of the position evaluation, if communicated to the employees, would provide a sense of knowledge as to where the employee fits within the organization. This could render additional incentives to personal achievement.

The advantages to be gained from position evaluation are substantial. However, the establishment of a position evaluation program may mean an equally substantial increase in cost. These will include the salaries of the wage and salary staff, the time that managers devote to the process, and the administrative cost inherent in a formal position evaluation program. Top management must, of course, weigh these costs against the potential benefit.

The first of these benefits is alignment with the organizational culture. Other benefits may be labeled "Collateral Benefits." These benefits are directly related to compensation and benefits. By having a valid position ranking, it will create a sound salary structure set up with appropriate grades and salary ranges.

Accurate position descriptions and position evaluations will also give focus to the physical nature of positions in the organization. This focus can be used for ergonomics reviews and a possible decrease in workers compensation claims.

Finally, the off-the-shelf programs can cost your company a lot of money. It will never be company specific and your employees will always feel you are missing something. Accurate position evaluations, done with the input of the employees, will secure open on-going communication within your organization. It is the way to remain union free and stay that way into the future.

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Appendix A: Outcome Oriented Job Description Example 2

**The Cheese Company
Job Description**

Job Title:	Packaging Employee
Facility:	Brownsville
Department:	Packaging
Reports To:	Packaging Leader and Team Manager
Pay Range:	2
Prepared By:	Angela and Tony
Approved By:	Cathy Van Deurzen -Organizational Development Manager
Date:	9/19/03

Summary

Under the direction of the Packaging Leader, Employees should perform packaging functions such as inspecting, bagging, sealing, boxing, labeling, stacking, or re-wrapping containers of cheese by performing the essential duties and responsibilities.

Essential Duties and Responsibilities

- Inspect the cheese and package.
To keep cheese safe and fresh.
- Feed the product onto the conveyors.
To continue the flow of production.
- Clean and sanitize the work area and equipment at the end of each shift.
To ensure the production of a safe product and work area.
- Restock supplies needed for the packaging job.
To keep production running efficiently.
- Track and enter inventory information (package size, weight, and type of product) into the company computer system.
To monitor supplies and product production.
- Report all potential safety hazards to team leaders.
So that Grande can endure a safe working environment for all team employees

Environment

- Humid
- High noise level
- Wet floors

Machines Used

- Conveyor belts
- Packaging vacuums

Safety

- Company supplies necessary safety equipment including bump caps, goggles, rubber gloves/boots, and ear plugs.
- Uniforms are provided and cleaned by the company for sanitation purposes.

Requirements

Education/ Experience

High school diploma or general education degree, and/or three months of related work experience or training.

Certification

Must be a certified forklift operator.

Language Skills

Each employee must be able to read and understand company documents such as: operating instructions, procedure manuals, and safety rules. Also, the employee must be able to communicate effectively with company contacts and customers.

Mathematics Skills

The employee should have the ability to perform basic mathematical functions such as: adding, subtracting, multiplying, and dividing in decimals, fractions, and measurement. Also, the ability to convert percent and ratio, and able to draw and decipher graphs.

Problem Solving

The employee must be able to deal with problem situations. Also, the ability to apply common sense to all instructions.

Physical Requirements

Ability to stand for long periods of time, use hands in all motions, walk, crouch, and crawl. The employee must be able to lift ten pounds often and up to fifty pounds at a time.

Appendix B: Knowledge, Skills and Abilities Designation Form

Knowledge, Skills and Abilities Designation

Job Title: _____ Date: _____

Job Expert: _____ Job Reviewer Initials: _____

Knowledge: A body of information, usually of a factual or procedural nature that makes for successful performance of a task or to identify something is going wrong:

Statement should include the kind and highest level of knowledge.

Example:

Knowledge of building materials including the uses, and perpetration of materials such as aluminum siding, concrete block and ply board

Knowledge of typing procedures for use with Microsoft Office including setup of documents and filing procedures for documents

Knowledge of spreadsheets and use of equations to track production or quality

Knowledge of -----

Skill: An individual's level of proficiency or competency in performing a specific task. Level of competency is typically expressed in numerical terms or measured outcomes.

Statement should include to what extend the skill is needed to be successful.

Example:

Skill in matching cut corners of building materials within 1/32nd of an inch

Skill in typing business correspondence at 50 words per minute

Skill in identifying the stretch of cheese in relationship to getting the right moisture level

Skill in/at -----

Ability: A more general, enduring trait or capability an individual possesses at the time when he or she first begins to perform a task.

Abilities cluster into categories of mental, and physical.

Example:

Ability to work in all temperatures and outdoors

Ability to use basic math to calculate addition, subtraction, multiplication, division, fractions, percentages, and simple algebra equations

Ability to physically endure 10 hours of flipping 70lbs. of cheese

Ability to ----

- Give Verbal instructions at what level to whom _____
- Coordinate special projects for whom _____
- Schedule you work load _____
- Diagnose problems at what level _____
- Direct a process of what kind _____
- Understand the meaning of words at what level _____
- Give presentations to whom and about what _____
- Read what and at what level _____

Appendix C: Education, Language, Mathematical, and Reasoning Review Form

Education, Language, Mathematical, and Reasoning Review

Job Title: _____ Date: _____

Job Expert: _____ Job Reviewer Initials: _____

Please select the level you need to perform the job listed above. Try to be as exact as possible.

EDUCATION and/or EXPERIENCE: Select the level of education and/or experience needed to successfully accomplish the essential duties of this job.

____ Level 1: No prior experience or training.

____ Level 2: Less than high school education; or up to one month related experience or training; or equivalent combination of education and experience.

____ Level 3: High school diploma or general education degree (GED); or one to three months related experience and/or training; or equivalent combination of education and experience.

____ Level 4: One year certificate from college or technical school; or three to six months related experience and/or training; or equivalent combination of education and experience.

____ Level 5: Associate's degree (A. A.) or equivalent from two-year college or technical school; or six months to one year related experience and/or training; or equivalent combination of education and experience.

____ Level 6: Bachelor's degree (B. A.) from four-year college or university; or one to two years related experience and/or training; or equivalent combination of education and experience.

____ Level 7: University program certificate; or two to four years related experience and/or training; or equivalent combination of education and experience.

WHY? _____

LANGUAGE ABILITY: Select the level of language (ability to read, write, and speak) needed to successfully accomplish the essential duties of this job.

____ Level 1: Ability to read a limited number of two- and three-syllable words and to recognize similarities and differences between words and between series of numbers. Ability to print and speak simple sentences.

____ Level 2: Ability to read and comprehend simple instructions, short correspondence, and memos. Ability to write simple correspondence. Ability to effectively present information in one-on-one and small group situations to customers, clients, and other employees of the organization.

____ Level 3: Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals. Ability to write routine reports and correspondence. Ability to speak effectively before groups of customers or employees of organization.

____ Level 4: Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports, business correspondence, and procedure manuals. Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public.

WHY?

MATHEMATICAL ABILITY: Select the level of mathematical abilities needed to successfully accomplish the essential duties of this job.

____ Level 1: Ability to add and subtract two digit numbers and to multiply and divide with 10's and 100's. Ability to perform these operations using units of American money and weight measurement, volume, and distance.

____ Level 2: Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent and to draw and interpret bar graphs.

____ Level 3: Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, area, circumference, and volume. Ability to apply concepts of basic algebra and geometry.

____ Level 4: Ability to work with mathematical concepts such as probability and statistical inference, and fundamentals of plane and solid geometry and trigonometry. Ability to apply concepts such as fractions, percentages, ratios, and proportions to practical situations.

WHY?

REASONING ABILITY: Select the level of reasoning abilities needed to successfully accomplish the essential duties of this job.

____ Level 1: Ability to apply common sense understanding to carry out simple one- or two-step instructions. Ability to deal with standardized situations with only occasional or no variables.

____ Level 2: Ability to apply common sense understanding to carry out detailed but uninvolved written or oral instructions. Ability to deal with problems involving a few concrete variables in standardized situations.

____ Level 3: Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form. Ability to deal with problems involving several concrete variables in standardized situations.

____ Level 4: Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

____ Level 5: Ability to define a problem, collect data, establish facts, and draw valid conclusions. Ability to interpret an extensive variety of technical instructions in mathematical or diagram form and deal with several abstract and concrete variables.

WHY?

Appendix D: Results for Education, Language, Mathematical, and Reasoning
Review

Location X Position	Education & Experience Level	Language Level	Math Level	Reasoning Level	Total PTS
Cheese Departments					
Curd Processing	1	2	1	2	6
Required-	Dairy Technology				
Cheesemaker	5	3	3	5	16
Required-	Cheesemaker License, Technology Development Series Pasteurizer Certificate., Dairy Technology, Laboratory Analyst License				
Intake	3	3	2	3	11
Required-	Weights & Samples License, Intake Snap Certificate., Commercial Drivers License Dairy Technology				
Intake Leader	4	3	3	4	14
Required-	Weights & Samples License, Certified Industry Supervisor, Dairy Technology, Intake Snap Certified, Commercial Drivers License				
Milk Equipment Operator	4	3	3	4	14
Required-	Pasteurizer Certificate, Dairy Technology				
Double O Operator	4	3	2	4	13
Required-	Cheesemaker's License, Pasteurizer Certificate., Dairy Technology				
Molder/chiller Operator	2	2	2	2	8
Required-	Dairy Technology				
Mix Mill Mold Float	2	2	1	2	7
Required-	Dairy Technology				
Brine	2	2	2	2	8
Required-	Forklift Certified, Dairy Technology				
Packaging Leader	4	3	2	4	13
Required-	Dairy Technology				
Packaging	1	2	1	2	6
Required-	Dairy Technology				
Current Packaging/Warehouse	2	2	1	3	8
Required-	Forklift Certified, Dairy Technology				
	4	3	3	4	14

Laboratory Assistant	Required-	Dairy Technology, Milk & Cream Tester Certificate.,				
Operations Float II			4	2	3	3
	Required-	Dairy Technology, Weights & Samples License, Intake Snap Certificate, Forklift Certified				12
Operations Float III			4	2	3	3
	Required-	Technology Development Series, Forklift Certified, Pasteurizer Certificate., Dairy Technology., Laboratory Analyst License				12

Support Departments

Maintenance Team Leader			5	4	3	5	17
	Required-	Read & Understand Electrical and Mechanical Blueprints, Dairy Technology Associate Degree or Industry Apprenticeship, Forklift Certified					
Maintenance Associate			4	3	3	5	15
	Required-	Read & Understand Electrical and Mechanical Blueprints, Dairy Technology Associate Degree or Industry Apprenticeship, Forklift Certified					
Shipping & Receiving			3	2	2	2	9
	Required-	Dairy Technology., Forklift Certified					
Building & Grounds			3	2	2	3	10
	Required-	Dairy Technology., Forklift Certified., Drivers License					
Water Purification Specialist			5	3	4	5	17
	Required-	Grade 2 Laboratory License, Active Sludge and Phosphorus Certificate, Continuing Education Credits Required to Maintain License, Driver's License					

Table 1: Pros and Cons of Different Approaches

Table 1

<i>Planning a new job evaluation scheme 69</i>		
Pros and cons of different approaches to customization		
Degree of customization	Benefits	Risks
Proprietary	<ul style="list-style-type: none"> ■ tried and tested, with an established reputation; ■ the consultants can draw on extensive experience of implementing similar schemes; ■ does not require intensive design effort; ■ may link to pay database; ■ computer support may be available as part of the package; ■ consultancy may have international network for implementation; 	<ul style="list-style-type: none"> ■ factors may suit some types of organization more than others; ■ may not lead to high level of internal ownership; ■ may be difficult to explain rationale for scoring and weighting; ■ can lead to ongoing reliance on external provider; ■ may include elements or supporting processes that do not meet organizational requirements, eg lengthy job descriptions.
Customized	<ul style="list-style-type: none"> ■ draws on external experience, so saves on design time; ■ gives a starting point to the design process, but gives opportunities to engage employees. 	<ul style="list-style-type: none"> ■ needs careful design input and implementation to avoid same risks as for proprietary scheme; ■ need to avoid 'cherry picking' factors or scheme design elements that do not logically hang together.
Tailor-made	<ul style="list-style-type: none"> ■ reflects the values and language of the organization – focuses on what is important; ■ fits the particular needs of the time; ■ participative design process likely to lead to greater buy-in; ■ no ongoing reliance on external provider; ■ able to align to competency framework. 	<ul style="list-style-type: none"> ■ needs investment of time and resources to develop scheme; ■ unless expertise is available in-house, needs external support through development process.

Table 2: Beginning Operations Classifications

OPERATIONS CLASSIFICATIONS

OPERATION IA	OPERATION I	OPERATION II	OPERATION III (MI)	OPERATION IV	MAINT. M II (Journeyman)
Laboratory Assistant B, J	Aged Product Processing W	Calibration Technician P	Aged Packaging Leader. W	Cheesemaker B, J, R, Y	Building & Grounds Leader B
	Buildings & Grounds B	Cheese Transfer Truck Driver W	Dice Shred Packaging Leader W	Waste Treatment Coordinator F, Y	Maintenance Electrician B, R, W, Y
	Brine B, R, Y	Distribution /Transport Float W	Dice/Shred Equipment Operator W	CIG Process Specialist. F	Maintenance Mechanic B, F, J, W, Y
	Courier H	Intake B, J, R, Y	Equipment Operator/Sanitation Specialist J	Distribution Coordinator D	Maintenance Leader B, F, R, W, Y
	Curd Processing B, J, R, Y	Operations Float Class II B, R, W, Y	General Maintenance (MI) B, F, Y	Starter Specialist B	
	Current Packaging B, J, R, Y	Receiving/Inventory Specialist F, J, Y	Intake Leader B		
	Current Storage B	Sanitation B, J, R, W, Y	Milk Equipment Operator B, J, Y		
	Dice/Shred/ Packaging W	Shipping/Receiving Specialist B, D, W	Mixer Specialist B, J, R, Y		
	Grated Cheese Specialist W	Whey Float Class II B, F	OO / Scherping Operator B, J		
	Mix-Mill-Mold B, J, R, Y		Operations Float Class III B, W, Y		
	Molder/Chiller Operator B		Packing Leader B, R, Y		
	Operations Float Class I B, R, W		Relief Operator- Fresh Curd B		
	Product Inspection W		Sanitation Leader J, W, Y		
	Whey Powder Packaging B, F		Transport/ Scheduling Specialist W		
			Waste Treatment Operator B		
			Whey Equipment Operator B, F		

The letters are the locations of the positions

Table 3: Environment Conditions

Please place an X in the appropriate box.

Work Environment Conditions:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Exposure Probabilities

- Wet
 Humid

Exposed to Extreme Heat

- Occasionally
 Frequently

Exposed to Extreme Cold

- Occasionally
 Frequently

Exposure Probabilities

- Outside Weather Conditions
 Risk of Electrical Shock
 Exposed to Vibration
 Exposed to High Precarious Places
 Works Near Moving Parts
 Exposed to Toxic, Caustic Chemicals
 Exposed to Fumes, Airborne Particles

Weekend Work

- Scheduled Weekends
 Occasionally Weekends
 Team / Job Specific Weekends

Noise Level

- Normal
 Moderate
 Loud
 Very Loud

Work Hours

- 8 Hours
 10 Hours
 12 Hours

Table 4: Physical Requirements

Physical Demand Level	Occasional 0-33% of the time Appr. Reps. 1-100	Frequent 34-66% of the time Appr. Reps. 100-500	Constant 67-100% of the time Appr. Reps. 500+
Sedentary	<u>0-10 lbs.</u>	<u>Negligible</u>	<u>Negligible</u>
Light	<u>11-20 lbs.</u> Sharpening Vat Operator (J) Card Proc. Lab (B) Brine (J)	<u>1-10 lbs.</u> Brine (B)	<u>Negligible</u>
Medium	<u>21-50 lbs.</u> Truck Driver (FdL) Conveyor Driver (L) Intake (J) Lab (R, Y, AF, J) Maintenance (R) Equipment Operator (Y, J) Building & Grounds (AF) Waste Treatment (AF, Y) Forklift Driver (FdL) Ricotta Associate (J) Ricotta Chocconemaker (J) Fior di Latte and Whey Lab (B) Starter Spec. (B)	<u>11-20 lbs.</u> Double O Operator (B)	<u>0-10 lbs.</u>
Heavy	<u>51-100 lbs.</u> Maintenance (W) Sanitation (W, Y, J) Packaging (B, J) Brine (Y) Intake (Y, B, R) Equipment Operator (AF, B) Shipping/Receiving (AF, Y) Lender (FdL) Cedar Picker (FdL) Waste Treatment (B) Whey Plant Shipping/Receiving (B) Fior di Latte Card Handler (B) Fior di Latte Eq. Tipping Vat (B) Whey Plant Eq. Operator (B) Warehouse Forklift Driver (J) Sanitation/Pkg. Lender (J) Shipping/Receiving Spec. (J) Current Warehouse (B) Building & Grounds (B)	<u>21-50 lbs.</u> Dice/Shred (W) Grated Cheese (W) Brine (R)	<u>0-20 lbs.</u>
Very Heavy	<u>Over 100 lbs.</u> Fior di Latte Case Pkg. Warehouse (B) Dice/Shred Equipment Operator (W) Mix-MBI-Mold (R) Sanitation (R) Maintenance (AF, B, Y, J) Fior di Latte Pkg. (B) Fior di Latte Mixer Spec. (B)	<u>Over 50 lbs.</u> Aged Product (W) Chocconemaker (R, B, J) Card Processing (R, Y, J, B) Whey Plant Powl. Packaging (B) Packaging (Y, R) Powder Packaging (AF) Plant II (Y) Plant III (Y) Plant (AF, R) Pkg. Lender/Brine (R)	<u>Over 20 lbs.</u> Inspection (W) Mix-MBI-Mold (B, Y, J)