

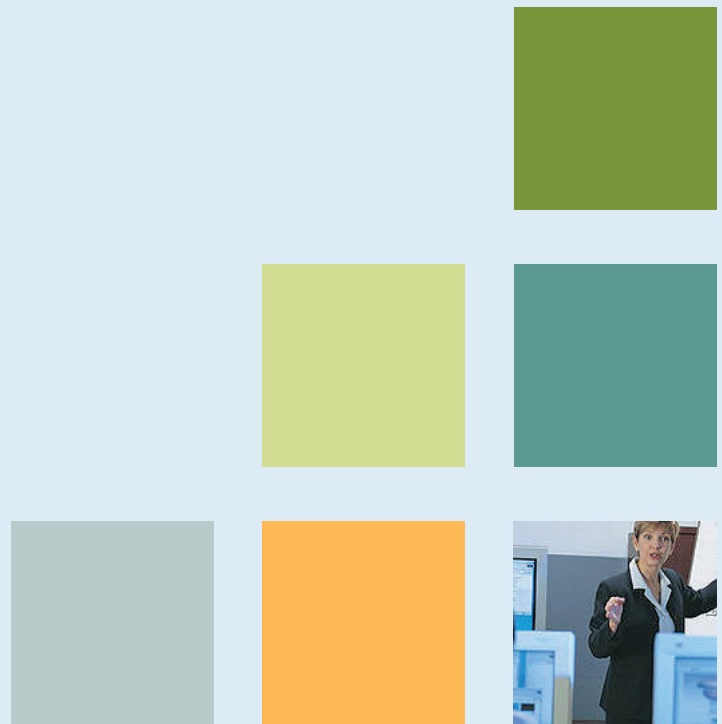
SHRMTM

SOCIETY FOR HUMAN
RESOURCE MANAGEMENT

Job Analysis-based Performance Appraisal

By Dale J. Dwyer, Ph.D

Instructor's Manual, Application Exercises and Activities



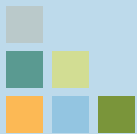
EMPLOYEE AND
LABOR RELATIONS



Job Analysis-based Performance Appraisal

Job Analysis for a Receptionist

| Receptionist | | | |
|---------------------------------------|--|----------------------------------|----------------|
| Essential Functions | How It's Done | Percentage Of Weekly Time | Ranking |
| Operate telephones. | Direct incoming calls to proper recipient. Assist with internal communications by paging employees as needed. | 35% | 1 |
| Computer work. | <ul style="list-style-type: none"> • Scrap report: Receive scrap report from previous day for all three shifts. Calculate total scrap per department for each shift. Enter information into the computer. Print results and give report to department managers. Once per week, print out the total weekly schedule and give the results to the same department managers. • Cases produced report: Receive production results of previous day from department supervisors. Calculate total cases produced per shift per day. Give results to the production department. • Printing department spec sheets: Receive Kidder and Webtron print schedules for the upcoming week. Enter print identification numbers into computer database to generate each print's specs. Give results to printing department and supervisors. Keep one copy on file. • Printing plate orders: Receive plate orders from production department. Enter information into computer database to keep track of plates outstanding. Print and give plate order to the National Printing plate representative. Enter faxed delivery dates into same spreadsheet. Give copy to production department. • Crew schedule: Receive crewing list from manager. Make necessary changes reflecting vacation days, shift changes, etc. Generate employee schedule for upcoming week. Make copies and give to all depts. | 30% | 2 |
| Maintain copy room. | Fill copier. Distribute incoming faxes. Sort incoming mail. Meter outgoing mail. | 3% | 5 |
| Typing. | Receive typing orders from various departments. Create and type office newsletter. Include articles given by department managers. | 25% | 3 |
| Balance petty cash. | Twice a week, count and balance the petty cash fund. | 5% | 4 |
| Pick up reports for Accounts Payable. | Pick up reports from department supervisors and hold them until Accounts Payable picks them up. | 2% | 6 |



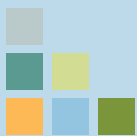
Job Analysis-based Performance Appraisal

Physical Demands

Do the major functions of the job require any of the following?

Occasionally = 1-33% Frequently = 34-66% Continuously = 67-100%

| Activities | N/A | O | F | C | Comments |
|---|-----|---|---|---|---------------------------|
| 1. Sitting | | | | X | |
| 2. Standing | | X | | | |
| 3. Walking | | X | | | |
| 4. Stooping | | X | | | |
| 5. Climbing | X | | | | |
| 6. Climbing ladders | X | | | | |
| 7. Kneeling | | X | | | |
| 8. Lifting | | X | | | Mail packages max 10 lbs. |
| 9. Carrying | | X | | | Mail packages max 10 lbs. |
| 10. Reaching | | X | | | When filing mail |
| 11. Pushing | X | | | | |
| 12. Pulling | X | | | | Mail packages max 10 lbs. |
| 13. Keyboard | | | X | | |
| 14. Use of tools | | X | | | Calculator |
| 15. Working under time pressure | | X | | | |
| 16. Working rapidly for long periods | X | | | | |
| 17. Manual dexterity | | | | | YES |
| 18. Close work | | | | | NO |
| 19. Good vision | | | | | YES |
| 20. Good color vision | | | | | NO |
| 21. Good hearing | | | | | YES |
| 22. Speaking | | | | | YES |
| 23. What type of surface are the major activities performed on? | | | | | Stable, flat |
| 24. Other occasional physical tasks | X | | | | |
| 25. Specific physical requirements | | | | | Be able to lift 10 lbs. |



Job Analysis-based Performance Appraisal

Cognitive or Mental Requirements

Does the job require any of the following on a daily basis?

| Requirement | Y | N | Comments |
|--|---|---|-------------|
| 1. Reading | X | | Memos, text |
| 2. Writing | X | | Memos |
| 3. Mathematics | X | | Basic |
| 4. Weighing and/or measuring | X | | Weigh mail |
| 5. Drawing conclusions from computer-generated material | | X | |
| 6. Analyzing data or report information | | X | |
| 7. Creating methodologies for accomplishing a goal | | X | |
| 8. Implementing recommendations by coordinating persons and/or other resources | | X | |
| 9. Developing plans, procedures, goals, strategies or processes based on data analysis or experience | | X | |
| 10. Directing activities of others to accomplish a goal | | X | |
| 11. Evaluating the performance of others | | X | |

Working Environment

Where are the major activities of the job carried out? (Check all that apply.)

| Location | < 50% | >50% | Comments |
|---------------------------------|-------|------|----------|
| 1. Indoors | | X | |
| 2. Outdoors | | | |
| 3. Underground | | | |
| 4. At a desk or bench | | X | |
| 5. In a car or truck | | | |
| 6. In an office or control room | | X | |
| 7. Other (specify) | | | |



Job Analysis-based Performance Appraisal

What access is there to the work area? Stairs? _____ Elevator? _____ What floor is it on? IST

Are there any conditions that are not standard to an office environment?

| Condition | Y | N | Comments |
|-----------------|---|---|----------|
| 1. Extreme heat | | X | |
| 2. Extreme cold | | X | |
| 3. Dust | | X | |
| 4. Dirt | | X | |
| 5. Fumes | | X | |
| 6. Chemicals | | X | |
| 7. Cramped area | | X | |
| 8. Dampness | | X | |
| 9. Vibrations | | X | |
| 10. Noise | | X | |

Example of an Employee Performance Review Dimension

The following is an example of what one performance appraisal dimension, "Communication and interpersonal skills," could look like.

Employee Name _____ Position Title _____

Performance Review Date _____ Department _____

Purpose of Review: 90-day evaluation Annual review Other

Instructions: Carefully evaluate employee's work performance in relation to the essential functions of the job. Check the box that most closely indicates the employee's performance over the entire appraisal period. Do not base your judgment solely on isolated or recent incidents. The ratings should reflect the standards that are acceptable for the position. Please provide support for your ratings in the area indicated. Use additional sheets if necessary.



Job Analysis-based Performance Appraisal

COMMUNICATION/INTERPERSONAL SKILLS: The extent to which the job requires employees to explain, describe, persuade, negotiate and generally convey intended meanings and information to others. Both the media to be used and the type of message or information to be conveyed should be considered when assigning degree ratings.

| | | |
|----------------------|--|--|
| Unsatisfactory | | Shows little or no effort to communicate to customers, co-workers or management. Receives complaints from others about lack of communication. Unable to resolve interpersonal conflicts without intervention. Demonstrates little effort toward teamwork. |
| Needs Improvement | | Shows effort to communicate but does not provide system documentation, technical documentation and e-mail protocols. Information stated is not understood by others and is incorrect. Requires assistance to resolve interpersonal conflicts. Shows some effort working with other team members. |
| Meets Expectations | | Follows instructions. Provides and presents verbal communication accurately and professionally. Does not require assistance to resolve interpersonal conflicts. Demonstrates teamwork capabilities. |
| Exceeds Expectations | | Follows instructions. Shows concern and commitment to ensuring excellent communication practices. Demonstrates teamwork capabilities and makes suggestions on how the team can work together more effectively. |
| Outstanding | | Takes on responsibility to initiate communication with customers, co-workers and management. Works to develop team effectiveness. |