



Treasury Board of Canada
Secrétariat

Secrétariat du Conseil du Trésor
du Canada

CLASSIFICATION STANDARD

ORGANIZATION AND METHODS

Administrative and Foreign Service Category

©Minister of Supply and Services Canada 1990

CONTENTS

	<u>PAGE</u>
INTRODUCTION	1
CATEGORY DEFINITION	3
GROUP DEFINITION	4
FACTOR DEFINITIONS/RATING SCALES	5
BENCH-MARK POSITION DESCRIPTION INDEX	13

in ascending order of point values

INTRODUCTION

The classification standard for the Organization and Methods Group is a point-rating plan consisting of an introduction, definition of the Administrative and Foreign Service Category and the occupational group, rating scales and bench-mark position descriptions.

Point-rating is an analytical, quantitative method of determining the relative value of jobs. Point-rating plans define characteristics or factors common to the jobs being evaluated, define degrees of each factor and allocate point values to each degree. The total value determined for each job is the sum of the point values assigned by the raters.

All methods of job evaluation require the exercise of judgement and the orderly collection and analysis of information in order that consistent judgements can be made. The point-rating method facilitates rational discussion and resolution of differences in determining the relative value of jobs.

Factors

The combined factors may not describe all aspects of jobs. They deal only with those characteristics that can be defined and distinguished and that are useful in determining the relative worth of jobs. Four factors are used in this plan.

Factor Weighting and Point Distribution

The weighting of each factor reflects its relative importance. Similarly, points are distributed to the factors or elements in an arithmetic progression.

Rating Scales

In the rating plan the following factors, factor weights and point values are used.

<u>Factors</u>	<u>Factor weights</u>	<u>Point Values</u>	
		<u>Minimum</u>	<u>Maximum</u>
Expertise	40	80	400
Nature and Impact of Activities	35	70	350
Managerial Responsibility	15	30	150
Interpersonal Communications	<u>10</u>	<u>20</u>	<u>100</u>
	100	200	1,000

Bench-mark Positions

Bench-mark position descriptions are used to exemplify degrees of factors. Each description consists of a brief summary, a list of the principal duties with the percentage of time devoted to each, and specifications describing the degree of each factor to which the position is rated. The bench-mark positions have been evaluated and the degree and point values assigned for each factor are shown in the specifications.

The rating scales identify the bench-mark position descriptions that exemplify each degree. These descriptions are an integral part of the point-rating plan and are used to ensure consistency in applying the rating scales.

Use of the Standard

There are six steps in the application of this classification standard.

1. The position description is studied to ensure understanding of the position as a whole. The relation of the position being rated to positions above and below it in the organization is also studied.
2. Allocation of the position to the category and the group is confirmed by reference to the definitions and the descriptions of inclusions and exclusions.
3. Tentative degrees of each factor in the position being rated are determined by comparison with degree definitions in the rating scales. Uniform application of degree definitions requires frequent reference to the description of factors and the notes to raters.
4. The description of the factor in each of the bench-mark positions exemplifying the degree tentatively established is compared with the description of the factor in the position being rated. Comparisons are also made with descriptions of the factor in bench-mark positions for the degrees above and below the one tentatively established.
5. The point values for all factors are added to determine the tentative total point rating.
6. The position being rated is compared as a whole with positions to which similar total point values have been assigned, as a check on the validity of the total rating.

Determination of Levels

The ultimate objective of job evaluation is the determination of the relative values of jobs in each occupational group. Jobs that fall within a designated range of point values will be regarded as of equal difficulty and will be assigned to the same level.

Level and Level Boundaries

<u>Level</u>	<u>Level Boundaries</u>
OM-1	200 - 240
OM-2	241 - 440
OM-3	441 - 640
OM-4	641 - 840
OM-5	841 - 1,000

CATEGORY DEFINITION

Occupational categories were repealed by the Public Service Reform Act (PSRA), effective April 1, 1993. Therefore, the occupational category definitions have been deleted from the classification standards.

GROUP DEFINITION

For occupational group allocation, it is recommended that you use the [Occupational Group Definition Maps](#), which provide the 1999 group definition and their corresponding inclusion and exclusion statements. The maps explicitly link the relevant parts of the overall 1999 occupational group definition to each classification standard.

EXPERTISE FACTOR

This factor measures the knowledge needed to perform the work and the skills required in the application of that knowledge.

Definitions

"Knowledge" refers to the understanding of the principles, theories, techniques and practices of organization and methods study and analysis and their application in such skills as:

- making critical analyses of methods and procedures with a view to recommending improvement;
- carrying out studies and preparing recommendations for improvement of specific aspects of existing or proposed departmental activities;
- formulating new concepts;
- performing advisory duties;
- planning a work program to achieve the objectives of the study;
- contributing to the overall achievement of the goals of the client.

"Field" refers to a broad area of study which encompasses the application of particular practices and techniques. Examples are: work study; organization analysis; systems and procedures analysis; operations research; work planning and control; information systems; forms design and control.

"Practices and techniques" refer to the means of carrying out studies. Examples are:

<u>Field</u>	<u>Practices and Techniques</u>
Work Study	- work sampling - workplace layout analysis - work flow analysis
Organization Analysis	- organization design - socio-technical analysis
Systems and Procedures Analysis	- charting and recording - feasibility and application studies
Operations Research	- management statistics - cost-benefit analysis
Work Planning and Control	- critical path method - PERT (Program Evaluation Review Technique) - Gantt charting

Notes to Raters

In evaluating positions, raters should take into consideration that studies carried out in one field may require the application of practices and techniques which are also used in carrying out studies in other fields. Therefore, although the duties of a position may be limited to studies in one specific field, knowledge of practices and techniques applied in studies in other fields may be required. In such cases the extent of knowledge of other fields is to be determined by the nature of the duties including the level of responsibility for the study.

The degree tentatively selected is to be confirmed by comparing the duties of the position being rated with the duties and specifications of the bench-mark position descriptions that exemplify the degree.

RATING SCALE - EXPERTISE

Degree Definitions	Degree	<u>Points</u>	Bench-mark Position Descriptions
<p>Knowledge of some practices and techniques in one or more fields of work and general knowledge of the objectives and operations of the client organization are required to collect and analyze data, and present findings and recommendations.</p>	A	80	1. Forms Analyst and Designer
<p>Good knowledge of one field of work or knowledge of several practices and techniques in two or more fields of work and good knowledge of the objectives and operations of the client organization are required to collect and compile information, analyze data, present findings and recommendations.</p>	B	160	2. Methods and Procedures Analyst 3. Management Analyst
<p>Comprehensive knowledge of one field of work (with knowledge of several practices and techniques in one or more fields) or good knowledge of two or more fields of work (with knowledge of several practices and techniques) and knowledge of the long-term plans, objectives, policies and operations of the client organization are required to plan, organize and conduct studies, analyze data, document and formulate findings and recommendations.</p>	C	240	4. Senior Forms Analyst 5. Management Consultant
<p>Comprehensive knowledge of two or more fields of work (with knowledge of several practices and techniques in more than two fields) and good knowledge of departmental long-term plans, objectives, policies and operations are required to develop project plans, analyze complex data, formulate concepts, produce findings and recommendations.</p>	D	320	6. Senior Management Consultant 7. Senior Analyst
<p>Thorough knowledge of organization and methods principles, theories, practices and techniques and comprehensive knowledge of the legislative basis for the policies, objectives and operations of the federal public service are required to identify problems, plan a work program, develop solutions to complex management problems, gain confidence of senior management, produce recommendations for improvements.</p>	E	400	8. Consultant 9. Project Manager

NATURE AND IMPACT OF ACTIVITIES FACTOR

This factor measures the difficulty of the work in terms of the nature and impact of activities. Definitions

"Nature of Activities" refers to the complexity of the work and the requirement for independent action. The extent is measured in terms of the judgement and initiative required to identify and recommend solutions to problems, the availability of direction and the difficulty in determining the implications of possible courses of action.

"Impact of Activities" refers to the effect of proposals, decisions and recommendations on organizations, operations, systems or practices studied.

Notes to Raters

The four degrees of the Impact of Activities element are illustrated by the bench-mark position descriptions. The following characteristics of the work are to be considered in determining a tentative degree for this element:

1. The size and nature of the organization served. "Size and nature" refers to such considerations as resources affected, diversity or specialized characters of operations, degree of centralization or decentralization of functions, and the complexity and interrelationship of systems and procedures.
2. The extent to which the position has the effective recommending authority, which is usually related to the level of the position in the organization.
3. The effects of recommendations on the operating practices of organizations.

These characteristics are only an indication of the impact of activities of the position, and the whole context within which the work is performed is to be considered in establishing a tentative degree of the element. The job as a whole is then to be compared with the bench-mark position description exemplifying the degree of impact that has been tentatively established and with the bench-mark position descriptions immediately above and below that degree.

RATING SCALE - NATURE AND IMPACT OF ACTIVITIES

NATURE OF ACTIVITIES					
Impact of Activities	Work is performed within detailed and readily applicable practices and techniques. Some initiative and judgement are required in their application and in the conduct of routine investigations, fact-finding and compilation of information.	Work is performed within the framework of established practices, techniques and precedents. Initiative and judgement are required in the conduct of more complex investigations, fact-finding and compilation of information and in the evaluation of possible courses of action.	Work is performed within the framework of general guidelines or principles. Initiative and judgement are required in the identification and resolution of problems which lack precedent or are difficult to define.	Work is performed within the framework of broadly defined objectives or policies. Initiative and judgement are required in the development of new concepts and alternative strategies in devising solutions to complex problems in diverse situations.	
	A	B	C	D	
	70	116	162		
1	1. Forms Analyst and Designer	2. Methods and Procedures Analyst 3. Management Analyst			
	117	163	209	255	
2		4. Senior Forms Analyst	5. Management Consultant		
	164	210	256	302	
3			6. Senior Management Consultant 7. Senior Analyst	9. Project Manager	
		257	303	350	
4				8. Consultant	

MANAGERIAL RESPONSIBILITY FACTOR

This factor measures the requirement to allocate and use effectively financial, material and human resources to develop and implement improvements in organizations, methods and practices, and their related administrative activities.

Notes to Raters

The following characteristics of the work are to be considered along with the degree definitions in determining a tentative rating for this factor: planning, organizing or coordinating work; selecting, coordinating and directing the work of project teams, organizations, committees and task forces; and appraising performance and determining the effectiveness of the work force.

RATING SCALE - MANAGERIAL RESPONSIBILITY

Degree Definitions	Degree	<u>Points</u>	Bench-mark Position Descriptions
<p>Responsibility is primarily for own work. There is an occasional requirement to coordinate the work of support staff in organizing routine information or data as well as to give instructions or demonstrate work methods, monitor and report on day to day activities.</p>	A	30	<ul style="list-style-type: none"> 1. Forms Analyst and Designer 2. Methods and Procedures Analyst 3. Management Analyst
<p>Responsibility for own work and as a Team Leader when required. Plans and assigns work to team members and coordinates their activities. Also monitors and reports on day to day activities. Provides guidance and technical supervision to assigned resources. Evaluates performance of team members when required.</p>	B	70	<ul style="list-style-type: none"> 5. Management Consultant 6. Senior Management Consultant 8. Consultant
<p>Continuous responsibility as a Team Leader or supervisor to plan, organize and coordinate resources. Identifies resource requirements, selects and coordinates work assignments of others. Evaluates performance of subordinates.</p>	C	110	<ul style="list-style-type: none"> 4. Senior Forms Analyst 7. Senior Analyst
<p>Continuous responsibility as a Project or Line Manager. Coordinates work through Team Leaders or supervisors. Identifies terms of reference, external and internal resources. Selects staff and allocates resources. Selects assignments, assigns work, coordinates activities and resources. Appraises and evaluates staff performance. Determines effective utilization of staff resources.</p>	D	150	<ul style="list-style-type: none"> 9. Project Manager

INTERPERSONAL COMMUNICATIONS FACTOR

This factor measures the degree of difficulty and importance of the interpersonal communications that occur as an integral part of the work and includes the requirements to work and communicate with others in person, by telephone or in writing.

Notes to Raters

Communications with immediate supervisor and subordinates are not to be considered.

RATING SCALE - INTERPERSONAL COMMUNICATIONS

Degree Definitions	Degree	<u>Points</u>	Bench-mark Position Descriptions
To give details, provide explanations, discuss, obtain co-operation.	1	20	1. Forms Analyst and Designer 2. Methods and Procedures Analyst 3. Management Analyst
To provide substantial advice or guidance, obtain agreement for all phases of studies or projects, provide management with documented justifications for study or project findings and recommendations.	2	60	4. Senior Forms Analyst 5. Management Consultant
To persuade, influence senior management to accept recommendations which have significant management implications and to negotiate their implementation.	3	100	6. Senior Management Consultant 7. Senior Analyst 8. Consultant 9. Project Manager

BENCH-MARK POSITION DESCRIPTION INDEX

<u>BM #</u>	<u>Descriptive Title</u>	<u>Expertise</u>	<u>Nature and Impact of Activities</u>	<u>Managerial Responsibility</u>	<u>Interpersonal Communications</u>	<u>Total</u>	<u>Level</u>
1.	Forms Analyst and Designer	A/80	A1/70	A/30	1/20	200	1
2.	Methods and Procedures Analyst	8/160	131/116	A/30	1/20	326	2
3.	Management Analyst	B/160	131/116	A/30	1/20	326	2
4.	Senior Forms Analyst	C/240	132/163	C/110	2/60	573	3
5.	Management Consultant	C/240	C2/209	B/70	2/60	579	3
6.	Senior Management Consultant	D/320	C3/256	B/70	3/100	746	4
7.	Senior Analyst	D/320	C3/256	C/110	3/100	786	4
8.	Consultant	E/400	D4/350	B/70	3/100	920	5
9.	Project Manager	E/400	D3/302	D/150	3/100	952	5

BENCH-MARK POSITION DESCRIPTIONS

Bench-mark position descriptions are to provide raters with guidance in the interpretation and application of the rating plan. They were developed at the time this standard was updated to provide examples of specific job features that illustrate the category and group inclusions as well as the various factors and their elements.

BENCH-MARK POSITION DESCRIPTION

Bench-mark Position Number: 1

Level: 1

Descriptive Title: Forms Analyst and Designer

Point Rating: 200

Summary

Reporting to the Head, Forms Management, analyzes information relating to forms projects, develops and designs new forms and improves or redesigns existing forms for headquarters and the regions. Participates in the creation and maintenance of the forms inventory system.

Duties% of Time

Analyzes assigned material relating to requests for new or revised forms. Discusses the objectives of the project with appropriate departmental officials. Gathers additional information and analyzes data by the use of forms analysis spread sheets and recurring data analysis sheets. Develops new and revised design specifications as required. Prepares form proofs and presents them for approval.

60

Analyzes assigned forms files as part of the continuing review of the forms inventory. Reports functional duplication and inconsistent practices in writing. Identifies design and procedural weaknesses in forms and systems and recommends action for correction.

20

Ensures that all forms are included and properly coded in the forms inventory system. Verifies that procedures for each form and for the total system are current in a Reference Manual.

10

Reviews published material relative to forms management from both within and outside the government. Participates as a forms specialist team member in studies, projects or committees as required.

10

SpecificationsDegree/
PointsExpertise

A/80

A knowledge of the analysis of forms procedures and forms design techniques is required in order to collect and analyze relevant information and to make recommendations concerning forms production and use. It **is** also necessary to have a basic knowledge of the objectives and operations of the organization in which the request or desired modification originated.

Nature and Impact of Activities

A1/70

Nature

The work requires the application of standard forms analysis practices and techniques in gathering and reviewing appropriate material and developing forms design specifications while carrying out assigned forms projects.

Degree/
Points

Impact

Recommendations concerning problems in forms design or procedural weaknesses that require remedial action are made to the Head, Forms Management and can affect the efficiency and economy of departmental forms production and use.

Managerial Responsibility

A/30

There is no responsibility for the work of others.

Interpersonal Communications

1/20

Interaction is required with departmental officials to obtain their cooperation and participation in forms projects. This includes both oral and written communication with the originator to request additional information, to provide details and explanations concerning standards and specifications relative to forms construction and production and to discuss proposed forms and forms systems.

BENCH-MARK POSITION DESCRIPTION

Bench-mark Position Number: 2

Level: 2

Descriptive Title: Methods and Procedures Analyst

Point Rating: 326

Summary

Reporting to the Assistant Director, Systems Development, participates in systems development projects headed by a Systems Analyst. Analyzes office practices and procedures in client organizations in relation to new systems proposals. Assists in the design, development and implementation of electronic data processing (EDP) systems and in post-implementation reviews.

Duties

% of Time

Analyzes policies, objectives, goals, trends in workloads and information needs of the client organization. Conducts fact-finding interviews and determines system application requirements. Prepares Data-Flow Diagrams of data flows, processes and storages used or required. Identifies inefficiencies and opportunities for expansion of capacity and scope of work. Suggests alternative methods of accomplishing the required objectives within the stated limitations. Assists in feasibility and cost-benefit studies of proposed alternatives and in implementation planning. 20

Designs input forms, screen formats and report layouts. Describes system application logic and rules using structured techniques such as pseudo-code, base code and decision trees and tables. Develops manual procedures to interface with the automated system. Designs test data for all system requirements and conditions. Develops user training materials and conducts training sessions of the proper use of hardware and software. Assists users with any problems encountered in the new system. 65

Reviews original requirements definitions in relation to current needs and identifies new requirements. Examines problem cases, time and space utilization and operational efficiency and effectiveness. Prepares written reports of deficiencies and areas of potential improvement. 15

Specifications

Degree/
Points

Expertise

B/160

The work requires good knowledge of EDP systems analysis including such practices and techniques as data flow charting, cost-benefit analysis and feasibility and application studies as well as good knowledge of the utilization of EDP systems including microcomputers. A good knowledge of the objectives and operations of the client organization is also required. This knowledge is needed in order to collect and analyze appropriate data and report findings relating to systems proposals, development and implementation.

Nature and Impact of Activities

131/116

Nature

The work requires participation in the identification and resolution of systems development problems. It is necessary to apply appropriate study techniques, analyze a range of data and make recommendations of automation alternatives, training requirements and documentation procedures.

Impact

Recommendations are made to an EDP Systems Analyst and contribute to the quality of the systems developed as well as to the reduction of costs. Decisions also affect the extent to which user requirements are met.

Managerial Responsibility

A/30

Responsibility is primarily limited to own work.

Interpersonal Communications

1/20

The work requires discussions with various EDP users and potential users in order to determine client needs with regard to system development and improvements. It is also necessary, in specifying and testing systems, to obtain the cooperation of users who may be resistant to automation. In addition, there is a requirement to explain the proper use of the hardware and software during user training sessions.

BENCH-MARK POSITION DESCRIPTION

Bench-mark Position Number: 3

Level: 2

Descriptive Title: Management Analyst

Point Rating: 326

Summary

Reporting to the Senior Management Analyst, plans and conducts assignments in the fields of organization analysis, systems and procedures analysis, operations research and work study in a number of regional and district offices. Participates as a member of committees in national projects and conducts studies in other regions.

Duties

% of Time

Participates in discussions with management concerning the identification and clarification of organizational and systems and procedures problems and the formulation of the terms of reference for proposed studies. Plans and estimates resource requirements and time schedules for proposed studies or segments of proposed projects for which responsibility has been assigned. Applies appropriate study techniques. Interviews staff at all levels concerning current methods and procedures. Analyzes pertinent information from selected documents. Determines and predicts levels of production of groups or individuals. Analyzes workplace layout and telephone requirements, forms and reporting systems, and office equipment requirements. Develops and evaluates alternative methods, systems or procedures using cost benefit or other types of analysis. Prepares a report of the findings, the evaluation of alternatives and recommended courses of action. Prepares and makes presentations to managers concerned with the review. Provides support in the negotiation of the acceptance of recommendations by line managers. Participates in the implementation of recommendations.

60

Participates as a member of committees in major projects at the national level or in other regions. Provides technical knowledge, applies techniques, performs analyses and makes recommendations as assigned by the committee chairperson.

30

Provides ad hoc information to management concerning organizational changes and improvements in human resources utilization and methods and procedures. Discusses developments in the management services field with management analysts in other federal and provincial departments and private organizations.

10

Specifications

Degree/
Points

Expertise

B/160

It is necessary to have a knowledge of a number of practices and techniques including work measurement, method study, systems and procedure charting, organization charting, workplace layout analysis and cost-benefit analysis in order to plan and conduct assignments in the fields of organizational analysis, systems and procedures analysis, operations research and work study and make appropriate recommendations. A good knowledge of the objectives of branch programs and associated administrative services is also required.

Nature and Impact of Activities

61/116

Nature

The work requires participation in the identification and clarification of problems to be studied, participation in the establishment of terms of reference for proposed studies, the application of appropriate study techniques, the assessment of alternative courses of action and the development of recommendations. While priorities are established and schedules approved by the Senior Management Analyst, the studies are carried out with a minimum of direction.

Impact

Recommendations require the concurrence of the Senior Management Analyst. Proposed changes in systems, procedures, methods, organization and office equipment selection can have a significant impact on the utilization of resources, reduction of operating costs and service to the public in regional and district offices.

Managerial Responsibility

A/30

There is a requirement to provide guidance and training to more junior employees as well as to employees working on special assignments.

Interpersonal Communications

1/20

The work requires interaction with management representatives from the area under review to discuss the terms of reference for proposed studies, obtain and provide necessary details during the conduct of the study and to present the final results. It is also necessary to communicate with all levels of employees to explain the nature of the study and to gain their cooperation in gathering relevant information and data.

BENCH-MARK POSITION DESCRIPTION

Bench-mark Position Number: 4

Level: 3

Descriptive Title: Senior Forms Analyst

Point Rating: 573

Summary

Reporting to the Head, Publishing and Forms Management, plans, organizes and implements the operations of the department's forms management program. Promotes the program throughout the department. Monitors the program and initiates and implements improvements. Supervises the Forms Management Unit.

Duties% of Time

Provides a department-wide forms analysis and design service. Oversees the analysis of proposed forms. Ensures that proposed forms meet the requirements of the department, branch and concerned staff and that new forms are required for a legitimate purpose. Makes suggestions for form improvements. Discusses cost estimates for proposed forms projects with managers and presents lower cost alternatives as necessary. Implements a system for the annual review of each form and participates in the review of forms. Verifies that the computerized forms inventory database has accurate and up-to-date profiles of all departmental forms. Interprets and applies the requirements of all government programs applicable to forms including Official Languages, Human Rights and the Federal Identity Program. Verifies all departmental forms in relation to specified design, typesetting, and printing quality levels. Controls expenditures and the acquisition, use and disposal of equipment. Implements and evaluates the operation of a computer forms design system. Analyzes, develops and implements forms policies and procedures. Drafts new directives, procedures and amendments. Consults with forms analysts and production experts in other government departments and private industry concerning such matters as production methods, costs and formats.

45

Provides training, advice and direction to forms coordinators in each branch at headquarters and in each region. Meets with managers to explain the forms management program. Discusses problems relating to forms and procedures analysis and forms production and use at departmental and interdepartmental meetings. Solicits and evaluates suggestions from employees for forms improvements.

20

Conducts paperwork simplification studies on request and prepares reports of results. Monitors forms implementation projects and reports on progress to managers concerned. Prepares an annual report on forms usage for each branch and region. Plans, analyzes, recommends and implements the use of new technologies and equipment to improve forms and forms services. Analyzes and evaluates audit reports.

20

Plans and assigns the work of the Forms Management Unit. Arranges for contractors to handle peak loads. Sets objectives, priorities and target dates. Provides advice and guidance and resolves problems. Reviews and evaluates work performance. Implements established personnel policies in the unit.

15

SpecificationsExpertise

C/240

The work requires a comprehensive knowledge of the principles and techniques of forms management as well as of the practices related to the production of forms. Considerable knowledge of the electronic design of forms is also necessary along with good knowledge of automated information storage and retrieval equipment and systems. In addition, there is a requirement for knowledge of the application of such techniques as cost-benefit analysis, paperwork flow diagrams and procedure flow charts. A good knowledge of departmental policies, objectives and operations is also required. This knowledge is necessary in planning, organizing and conducting forms analysis and design projects, in analyzing forms usage and paperwork simplification data and in recommending improvements to the forms management program.

Nature and Impact of Activities

132/163

Nature

The work requires the resolution of problems related to the analysis, design, production and implementation of forms. Recommendations are made to departmental officers on all aspects of forms design, usage and costs and on ways of improving forms systems and procedures. While forms analysis and design services are based on established practices and techniques, it is necessary to evaluate the feasibility of new technologies and equipment in recommending improvements and changes in procedures.

Impact

The work requires planning, organizing and implementing the operations of the forms management program which is department-wide and makes a vital contribution to the efficiency and effectiveness of departmental operations and administration. Implementation of the recommendations, which are made to the Head, Publishing and Forms Management, result in standardization and improvement of forms and processing methods, reduction of printing costs and elimination of unnecessary administrative time. This not only reduces financial and resource expenditures but also improves the quality of service to the public. Recommendations also affect the acquisition and disposal of equipment necessary for the design and production of forms and forms systems. There is responsibility for overseeing expenditures of over \$300,000 annually.

Managerial Responsibility

C/110

The work requires the supervision of a unit consisting of two forms analysts and a designer. This includes the planning and organization of resources, the coordination of work assignments and the evaluation of performance.

Interpersonal Communications

2/60

The work requires communication with branch and regional managers to give advice on proposed forms projects and present possible alternatives in order to lower costs. There is a requirement to promote recommendations for the improvement of forms and related systems and to obtain managers' agreement on all aspects of projects.

BENCH-MARK POSITION DESCRIPTION

Bench-mark Position Number: 5

Level: 3

Descriptive Title: Management Consultant

Point Rating: 579

Summary

Reporting to the Chief, Management Practices, participates in management consulting and systems development projects headed by a Senior Consultant and conducted throughout the department. Plans, organizes, co-ordinates and controls selected assignments. Provides an advisory service to management.

Duties% of Time

Discusses the nature of problems relating to management consulting projects with a Senior Consultant and senior officials and develops strategies to gain managers' acceptance, understanding and desire for change. Conducts preliminary surveys and management reviews to clarify problems. Assists in the development of terms of reference of projects which define the problems, the approach to be taken and a work plan giving consulting and client resource requirements and target dates for different phases of the project. Determines study techniques and carries out the various phases of the project. Develops optional solutions to identified problems and prepares documentation of the analysis and subsequent implementation plan. Makes oral and visual presentations to gain management acceptance. 45

Discusses management information problems along with organization, objectives and management processes with senior officials. Identifies their information system requirements and prepares a User Requirements Specification. Participates in a feasibility study which includes the analysis of all relevant data, procedures and systems, the evaluation of all possible manual and automated solutions to identified problems and recommendations for the optimum solution. Contributes to the development of a Functional Specification for the accepted system. Provides input to different phases of the department's system development process. 25

Carries out selected consulting projects and determines the level and expertise of resources required to meet management objectives. Establishes goals acceptable to management and achievable by the project team. Assigns tasks, schedules the various phases, co-ordinates interrelated studies, monitors work and evaluates performance. Informs management of project progress and resolves any problems. Makes presentations at management committee meetings and discusses optional solutions. Develops formal reports of results. 15

Responds to requests from all levels of management for advice and assistance in resolving problems not associated with consulting assignments. Carries out research relating to management philosophies and techniques for implementation in client areas. 15

SpecificationsExpertise

C/240

A good knowledge of organization analysis, systems and procedures analysis, operations research and information systems analysis including the application of such techniques as organization design, feasibility studies, impact analysis, requirements analysis, cost-benefit analysis and resource utilization planning and control **is** required in order to determine the approach, plan and organize management improvement projects, analyze results and summarize findings. This also requires knowledge of the objectives, policies, operations and long-term plans of the organization under study.

Nature and Impact of Activities

C2/209

Nature

There is a requirement to arrive at optimum solutions to diverse problems concerning changes in methods and procedures, organization structures, policy and management information systems. It is necessary to identify the nature of problems, establish terms of reference for selected studies, determine and modify study techniques, develop approaches from a variety of options, establish priorities and target dates for different phases of projects and select report contents and format. While the approach, method and recommendations as well as project completion dates are discussed with a Senior Consultant, the work is carried out without any additional review.

Impact

Recommendations are made to senior departmental officials upon discussion with a senior consultant. Implementation of recommendations can result in redistribution of work among staff, changes in organizational structures and management information systems, and generally improved utilization of financial, material and personnel resources.

Managerial Responsibility

B/70

There is a requirement to lead a project team composed of one or more analysts and participating client personnel in carrying out specific consulting assignments.

Interpersonal Communications

2/60

It is necessary to communicate with client managers at all levels to discuss managerial problems, to ensure the manager's familiarity with the progress of projects and to gain approval of any alterations at critical stages. There is responsibility for determining the format and contents of project reports that **is** most likely to gain management's acceptance of recommendations. Advice must be provided on problems arising from changing philosophies, organization or functions caused by modifications in legislation, regulations or public demands and affecting the operations, procedures and utilization of resources.

BENCH-MARK POSITION DESCRIPTION

Bench-mark Position Number: 6

Level: 4

Descriptive Title: Senior Management Consultant

Point Rating: 746

Summary

Reporting to the Director, Management Consulting and Administrative Practices Division, plans, organizes, directs, controls and conducts studies to identify and analyse problems related to the organization, systems, operations and management on behalf of senior managers. Directs and co-ordinates teams responsible for major projects. Develops solutions for managers' problems and helps managers apply them. Also conducts organizational reviews.

Duties% of Time

Identifies problem areas through consultations with client management and recommends the role and involvement of the division in developing solutions. Undertakes preliminary analysis and determines the terms of reference (scope, objectives, resources, timeframes) of the project with senior officials. Develops plans and operating methods and procedures for studies. Identifies the extent, kind and source of relevant data to be analyzed and the requirement for specialist or technical expertise. Recommends the personnel, financial and other resources required and determines the need for contractors. Examines relevant aspects of the client organization such as its legislative base, mandate, assigned responsibilities, regulations and directives governing its operations and the level of satisfaction with services provided. Collects pertinent facts regarding client activities and the organization structure. Analyzes data gathered using a variety of techniques.

20

Develops project objectives and terms of reference with analysts and departmental personnel engaged in major projects. Plans organization and division of work to be done by project team. Develops detailed schedules and target dates for completion of project phases with team members. Assesses the implementation of changes in the terms of reference. Coordinates the activities and reviews progress of the project team members. Prepares written and oral progress reports for senior management. Reviews completed work of team members. Develops integrated solutions to problems and compiles and edits formal project reports.

20

Makes presentations to senior management and discusses the implications of proposed changes with them and with the appropriate central agency as required. Develops an integrated plan and schedule for the implementation of recommendations accepted by management. Provides briefing and training to employees on new systems or processes. Establishes implementation measurement and assessment criteria. Monitors the progress of implementation activities and adequacy of changes and makes appropriate adjustments.

20

Reviews existing organization concepts and identifies overlapping managerial responsibilities, program interfaces and gaps in program interrelationships and determines the resulting impact on the structure of the department. Develops and promotes an understanding of the differences in organization structuring and makes appropriate recommendations to senior management regarding organization change.

20

% of Time

Provides advice concerning specific problems to management on short notice. Provides guidance to managers regarding the use of private consulting firms and assists them in determining the scope of the project, activities to be performed, resources required, project schedule, evaluation of contract bids and review of project recommendations. Conducts research and develops projects to apply and test new developments in management and organization theory.

20

Specifications

Degree/
Points

Expertise

D/320

The work requires a comprehensive knowledge of the fields of systems and procedures analysis, work study, operations research and organization analysis in order to select and apply a wide range of management analysis techniques such as systems and procedures charting, work flow analysis, cost-benefit analysis and organization design. It is also necessary to have a good knowledge of departmental objectives, policies, operations and long-term plans to identify problem areas in the client organization within the departmental context, develop appropriate project plans, coordinate and conduct the analysis of relevant complex data, formulate acceptable alternatives and determine the optimal solutions to problems for presentation to management.

Nature and Impact of Activities

C3/256

Nature

The work requires the identification and resolution of a variety of systems, operational, organizational and managerial problems or deficiencies. There is a requirement to recommend the nature of the project to be undertaken, to develop the terms of reference, to identify the range of data to be analyzed and methodology to be utilized, to determine the expertise required to complete the project, to develop schedules and target dates for project phases, to develop integrated solutions to problems, to assess their impact and to compile project reports.

Impact

Recommendations concerning project findings are made to senior departmental managers up to the Assistant Deputy Minister level subject only to a general review by the Director, Management Consulting and Administrative Practices. These recommendations include such proposals to clients as changes in legislation, policy and directives, new program and operational planning methods, improved systems and procedures for the administration of programs, modified control and reporting procedures, changed division of responsibility, interrelationship of functions, delegation of authority and amended organization structure. Implementation of these proposals can affect program budgets and services to the general public, industry and private institutions.

Managerial Responsibility

B/70

There is a requirement to lead and coordinate teams of analysts and departmental personnel engaged in major projects as well as to conduct projects as the sole resource depending on the nature of the studies to be done.

Degree/
PointsInterpersonal Communications

3/100

The work requires consultations with senior managers of the department to identify problems areas to be studied and to establish project objectives, terms of reference and resources requirements. The support and cooperation of senior management must also be obtained in gaining acceptance of proposed recommendations and implementing significant changes in their organizations which can have considerable impact on program budgets and delivery.

BENCH-MARK POSITION DESCRIPTION

Bench-mark Position Number: 7

Level: 4

Descriptive Title: Senior Analyst

Point Rating: 786

Summary

Reporting to the System Implementation and Coordination Section Head, plans, develops, organizes and conducts a range of studies relating to automated data processing (ADP) problems. Leads and coordinates project teams. Recommends systems solutions to senior officials and co-ordinates implementation.

Duties% of Time

Examines the basis for the objectives and operations of the organization and ascertains operational priorities. Undertakes a preliminary analysis and establishes terms of reference of project with senior officials. Reviews regulations, directives and reports of the organization. Studies existing management information systems, practices and policies. Identifies the extent, kind and source of relevant data and directs the collection of pertinent facts. Analyzes data and determines the causes of management problems and operational deficiencies. Develops alternatives and recommends solutions. Prepares formal reports and presentations on completed studies. 45

Develops and explains the objectives and terms of reference of studies to the project team. Plans the organization and division of work and develops detailed schedules and target dates for the various phases with project team members. Advises team members on problems during the study. Identifies the need for significant changes in the terms of reference and assesses implications. Coordinates team activities, reviews progress and prepares written and oral progress reports. Develops integrated solutions to management problems with team members and presents conclusions to senior officials. Compiles and edits formal project reports. Develops integrated plans and schedules for implementation in the organization with team members and senior officials. Evaluates performance of team members. 35

Plans, develops, promotes and implements training programs to introduce new techniques or systems to the organization. Plans and organizes pilot projects and coordinates implementation operations. Undertakes research projects, writes papers and presents lectures. Initiates projects to test new developments. 20

SpecificationsDegree/
PointsExpertise

D/320

A thorough knowledge of information systems analysis and planning techniques is required along with comprehensive knowledge of the principles and application of other systems and procedures, organization analysis and operations research techniques. It also requires an in-depth knowledge of ADP including information system design, application software, proprietary software, operating systems, hardware and data communications. In addition, it **is** necessary to have good knowledge of the objectives, operations and management practices of the department. This knowledge is necessary to understand, define and analyze management information system and ADP problems, to coordinate and conduct studies, and to develop and present proposed solutions.

Nature and Impact of Activities

C3/256

Nature

It **is** necessary to plan, develop and implement a wide range of ADP-oriented management studies and projects involving major changes and the application of new developments to the department.

Impact

Recommendations are made to senior departmental officials subject only to general review by the Section Head. Implementation of changes in the resolution of management information problems can affect departmental functions or services that may have an impact on the public, business or industry.

Managerial Responsibility

C/110

The work requires ongoing responsibility for the coordination and supervision of project teams composed of one or more analysts and/or departmental personnel assigned for the duration of each project. The number and size of teams corresponds to the number and nature of projects undertaken at any particular time.

Interpersonal Communications

3/100

Meetings are held with senior officials of the department to discuss and gain acceptance of the terms of reference of studies that identify and analyze their ADP-oriented management information problems. It **is** necessary to persuade managers to implement recommended improvements which can result in major changes affecting government functions or services when there may be resistance to change.

BENCH-MARK POSITION DESCRIPTION

Bench-mark Position Number: 8

Level: 5

Descriptive Title: Consultant

Point Rating: 920

Summary

Reporting to the Director, General Management Consulting, plans, organizes, and undertakes management consulting studies for federal government departments, agencies, Crown corporations, international organizations and the governments of foreign countries. Leads and coordinates the work of project teams. Conducts practical and theoretical research. Undertakes promotional activities on behalf of the Branch.

Duties% of Time

Analyzes the need for consulting studies of client organizations, systems, policies, programs and activities, cross-governmental functions and management and administration problems. Determines management consulting involvement and participates in the development of terms of reference with clients. Develops criteria and standards of performance for study objectives. Examines the legislative basis of objectives and operations of the organization. Determines authorities and priorities for policies, systems, programs and operations and evaluates relevant regulations, directives and reports. Assesses existing management practices and approaches and determines their effect on the organization and its problems as well as the potential for improvement. Identifies the sources, extent, kind and relevance of information and data and gathers it through surveys, questionnaires or interviews or designs other approaches. Analyzes information and data using appropriate analytical methods and techniques. Develops strategic workable options to resolve problems and recommendations for action. Makes formal presentations on alternatives and explains proposed changes, their impact and potential improvement of client situations. Formalizes study findings, conclusions and recommendations in a report to clients. Develops integrated plans for implementation of approved changes with clients and participates in implementation as agreed upon with them.

60

Develops project plans for the organization and management of project team work and finalizes with clients. Selects contract consultants and client organization staff and assigns to project work. Advises project team members on specific problems and solutions. Directs the collection, analysis and use of data and information. Prepares and presents progress reports. Identifies and assesses the need for modification to the terms of reference and negotiates changes. Develops conclusions with team members and leads the analysis and assessment of recommendations. Evaluates performance of team members.

20

Conducts practical and theoretical research in public administration and management practice and in at least one area of specialization. Initiates and undertakes projects to develop and test new consulting tools, techniques and approaches. Writes articles for publication in management and professional journals.

10

Analyzes management trends in the federal, provincial and international sectors and identifies potential for management consulting services. Participates in the formulation of business, product and market development plans, strategies and programs for management consulting services. Develops a network of contacts in the public sector and undertakes promotional activities with potential clients.

10

SpecificationsExpertise

E/400

The work requires a thorough knowledge of organization and methods principles, theories, practices and techniques along with consulting skills to identify problems, develop project plans and activities and provide practical solutions and recommendations to a wide range of client organizations. There is also a requirement for a consulting specialty (such as management information systems) in order to lead specific projects requiring unique expertise. In addition, sound knowledge of the legislative basis for the operations and management practices of the public sector is necessary.

Nature and Impact of Activities

D4/350

Nature

The work requires being the lead person with clients for projects involving all levels of the organization or interrelated organizations. Recommendations are made with regard to the planning, development, evaluation, design and implementation of major changes in the programs, operations, structures and activities of client organizations. There is a requirement to develop new consulting and management tools, techniques and approaches through both research and consulting practice in order to contribute to the improved performance of client organizations.

Impact

Consulting assignments are carried out for senior executives primarily up to the Assistant Deputy Minister level but may also be at the Deputy Minister level federally, provincially and internationally. There is a requirement to make recommendations directly to clients subject only to a general review by the Director or Assistant Director. These recommendations are for actions encompassing legislation, policy, programs, systems, productivity, operations and processes and responding to a wide spectrum of problems in the public sector nationally and internationally. As all work is done on a full cost recovery, fee-for-service basis, client satisfaction is essential to avoid serious financial repercussions.

Managerial Responsibility

B/70

It is necessary to lead and coordinate the work of teams of contract consultants and client organization staff when required by the size and nature of the projects undertaken.

Interpersonal Communications

3/100

The work requires the provision of objective advice and guidance to the most senior personnel of client organizations often involving new programs and approaches, changing long-standing management practices and putting management improvement programs into place. There is a need to overcome resistance to change, reach compromises and generate acceptance of recommendations being made.

BENCH-MARK POSITION DESCRIPTION

Bench-mark Position Number: 9

Level:5

Descriptive Title: Project Manager

Point Rating: 952

Summary

Reporting to the Director, Management Consulting Services, plans, organizes, directs, controls and co-ordinates the work of a number of project groups engaged in studies that identify and analyze operational and management problems upon request and recommends solutions to senior officials. Participates in the direction of the Management Consulting Services Directorate.

Duties% of Time

Participates in consultations with senior officials to identify problems and to recommend appropriate involvement of the Management Consulting Services Directorate. Discusses and establishes objectives and terms of reference of proposed projects with senior officials. Develops plans, operating methods and procedures and obtains their agreement concerning final project plans. Collects pertinent facts, analyzes relevant data, develops solutions to management problems and documents results for presentation to senior officials.

25

Negotiates resources including the secondment of departmental personnel for large-scale projects. Selects external management consultants when necessary and negotiates their financial conditions. Assigns these resources or section staff to tasks or segments of projects and approves terms of reference and schedules for each segment. Provides advice and guidance and determines special approaches and techniques when appropriate. Co-ordinates the activities of teams and monitors progress. Guides and assists teams in the development of proposals and recommendations. Reviews and evaluates interim and final reports. Assesses the implications of recommendations and makes presentations to senior officials. Provides advice and assistance to them in effecting implementation.

45

Participates as a member of the Directorate Management Committee. Describes and interprets the range of services offered by the directorate. Contributes to the development of departmental policy in the delivery of management consulting services and to the establishment of project priorities. Supervises consultants, recruits staff, participates in training and development of staff and prepares performance appraisals.

20

Provides ad hoc advice to management in resolving problems on short notice. Serves on training advisory committees and participates in the development and conduct of management improvement training programs. Carries out research and development to determine improved methods of meeting the needs of the client.

10

SpecificationsDegree/
PointsExpertise

E/400

The work requires a thorough knowledge of organization and methods principles, theories, practices and techniques and of the methods used in conducting major management studies of complex departmental functions, operations, organization and management systems and practices. It also requires a comprehensive knowledge of government administrative

policies and practices, their legislative basis and their interrelationship with departmental policies and operations. This knowledge is needed to plan and coordinate major departmental studies at all levels of the organization and to develop solutions to complex management problems.

Nature and Impact of Activities

D3/302

Nature

The work involves the development of solutions to problems involving complex changes in departmental policy and the achievement of the department's primary objectives. In order to arrive at acceptable solutions, it is necessary to organize and direct a wide range of management consulting studies which may include the application of new concepts and developments in management improvement principles and practices.

Impact

Recommendations are presented on a confidential basis to senior departmental officials or to the deputy head subject to only a general review by the Director. Decisions resulting from studies are concerned with important changes in overall policy on matters affecting the department, organization structure, delegation of authority, assignment of authority for major departmental functions, reassignment of responsibility between units and programs and services that may have an impact on the public, business or industry.

Managerial Responsibility

D/150

It is necessary to direct, control and coordinate a number of project teams composed of a Team Leader and one or more directorate consultants and analysts, staff seconded from other areas of the department and at times private consultants retained by the department and to supervise project teams directly depending on the size, nature and complexity of each project. There is also an on-going responsibility to participate in the direction and supervision of the work of the Management Consulting Services Directorate.

Interpersonal Communications

3/100

There is a requirement to gain the confidence and cooperation of senior departmental officials up to the Deputy Minister level in planning and conducting projects. It is also necessary to persuade them to accept major management improvement proposals involving management practices, operating methods and organizational structures as well as to implement changes in departmental policy, programs and services.