



Standards for Selection and Assessment

Section 1: Generic Standards for Selection and Assessment

Table of Contents

1. [Understand the position\(s\)](#)
 2. [Specify qualifications](#)
 3. [Choose or develop assessment methods](#)
 4. [Collect and integrate information](#)
-

1. Understand the position(s)

Standard: The foundation on which assessment is based is an understanding of the position, group of positions or level within an occupational group, as applicable.

An analysis of the position, group of positions or level within an occupational group, as applicable, provides the information used to specify required qualifications. This analysis must consider the duties to be performed in the job, their scope and level, and the context in which these are to be performed.

Along with the immediate requirements of the work to be performed, under certain circumstances it is appropriate to consider future work activities and responsibilities and organizational needs.

The documents required for the classification of positions are a key source of information about the position, group of positions or level within an occupational group as applicable. All information that can assist in understanding the nature of the position or group of positions may be used in establishing qualifications. It must be borne in mind, however, that the purpose of classification documents is to establish the relative worth of positions within an organization and not to establish the competence required of candidates. Descriptions of work do not always provide all the required information on how the work is to be performed or on the situational and organizational aspects of a position, group of positions or level within an occupational group, as applicable. Both factors may influence the type, depth and breadth of qualifications. The responsible manager is normally the best source of information in this regard.



[Top of Page](#)

2. Specify qualifications

Standard: Qualifications must be based on the work to be performed in the position, group of positions or level within an occupational group, as applicable.

Qualifications refer to any attributes or accomplishments that equip a person for a position, group of positions or level within an occupational group, as applicable. Qualifications may be expressed in terms of type, depth and breadth. The qualifications specified must be related to the work to be performed in the position, group of positions or level within an occupational group, as applicable. These qualifications, collectively, must cover the work to be performed, and must provide a basis for selection according to merit (1).

Care must be taken to ensure that qualifications established do not discriminate against potential candidates, directly or indirectly, on any prohibited ground under the Canadian Human Rights Act. In certain situations a qualification that is discriminatory may be acceptable if it is deemed to be a bona fide occupational requirement (BFOR). A BFOR refers to the prescription of a standard or qualification that is discriminatory on a prohibited ground where that standard or qualification is deemed essential to get a job done efficiently and safely and where it would be impossible to accommodate individual employees without imposing undue hardship upon the employer or the department (2).

The Deputy Head, or his or her delegate, is responsible to establish qualifications. The Deputy Head's delegate is often the manager of the position (3).

Qualifications for future needs may also be considered. Such qualifications may reflect emerging technologies or changing responsibilities affecting a position, group of positions or level within an occupational group, as applicable. Where it can be demonstrated that an occupational level is a direct feeder to a higher occupational level, the qualifications may also encompass the requirements of that higher level. It is also appropriate to take into consideration the qualification requirements for structured long-range development programs.

The manager (4) must identify qualifications (such as knowledge, abilities and personal suitability) and the specific elements of each qualification in terms of both the context of the work to be performed and the potential candidate pool. The level of job performance required, the strengths and weaknesses of the current work team, and other organizational needs will help the manager to determine the relative weight of the qualifications. In addition, these can be used to identify which of the established elements should be considered as compensatory and which should be considered as non-compensatory.

Where relevant, the manager may also identify preferences for higher levels of certain qualifications providing that the higher level relates to immediate or future work requirements. Preferences allow for human resource planning and take into consideration current and future organizational needs.

The resulting list of qualifications and elements constitutes the Statement of Qualifications against which the candidate(s) will be evaluated. This Statement of Qualifications will identify which of the elements are compensatory or non-compensatory and outline any preferences and how they will be applied. If no such identification is provided, all listed elements are presumed to be compensatory. (5 & 17)

Departments are to provide information about the selection process, in particular the statement of qualifications, to potential candidates and are encouraged to discuss it with them early in a selection process. Individuals who have concerns about a statement of qualifications may request a review through the Public Service Commission's Recourse Branch, which may review qualifications to ensure that they afford a basis for selection according to merit. The review should be carried out as early as possible in the selection process because a change in qualifications could have a major impact on the process (6).

Qualifications

The following types of qualifications are recognized:

- Knowledge,
- Abilities/Skills,
- Aptitudes,
- Personal Suitability,
- Experience,
- Education,
- Occupational Certification,
- Official Language Proficiency.

Each type of qualification is defined below. [Section 2](#) of this document prescribes specific standards that apply to certain qualifications and for certain groups.

Knowledge refers to the awareness and understanding of facts, theories, systems, practices, regulations and other information.

Abilities/Skills refer to what a person can do. For the purpose of these Standards, these two terms may be used interchangeably. This type of qualification encompasses a wide variety of different abilities/skills, including psychomotor or physical abilities such as typing, operating machinery, and various strength requirements.

In addition, abilities/skills may be either "specific" or "generic".

- a. Specific abilities/skills are defined, and assessed, on the basis that their content is specific to a position. Because of this, specific abilities/skills cannot be assumed to be transferable from one position to another.
- b. Generic abilities/skills are defined, and assessed, in terms that are not specific to a position. The content of the assessment instrument(s) used to assess generic abilities/skills need not be similar to the content of the position. Generic abilities/skills are, by definition, generalizable to all positions for which the ability/skill is relevant.

Specific standards with respect to Abilities/Skills exist for certain groups. These are prescribed in [Section 2](#).

Aptitudes refers to what a person can learn to do given training or exposure to the appropriate environment. In other words, Aptitudes refers to the potential or capacity to acquire new abilities/skills. Specific standards with respect to Aptitudes exist for certain groups. These are prescribed in [Section 2](#).

Personal Suitability refers to the personal traits, characteristics, or attributes that affect the performance of one's duties. Personal Suitability includes a wide range of motivations and attitudes relevant to effective work behaviour such as stress tolerance, resourcefulness, and flexibility.

Experience refers to the past practice of activities that provided an opportunity for the acquisition of knowledge and the development of skills/abilities relevant to the work to be performed in a job. Experience may be expressed in terms of its relevance, depth and breadth or other aspects as they relate to the duties and responsibilities involved.

Education refers to academic, vocational, or technical studies and training acknowledged through a credential or other official documentation from, or accepted by, a recognized Canadian educational institution. Formal training from federal government departments, agencies, or other

institutions considered appropriate by the manager of the position being staffed is also acceptable. Specific standards with respect to Education exist for certain groups and levels. Alternatives to Education may also be applicable for certain groups. Applicable education standards and alternatives are outlined in [Section 2](#).

Occupational Certification. Unless otherwise provided for by the Public Service Commission in these standards or in amendments to these standards, Occupational Certification refers to the possession of, or eligibility for, credentials such as a license, certificate, registration, letter, paper(s) or other documents that constitute acceptable evidence of occupational competence and that are granted by an organization legally established by federal, provincial or territorial law as a certifying or licensing body in Canada having the authority to regulate the practice of a profession, trade or act. Certain standards with respect to Occupational Certification exist for specific groups and levels. These are prescribed in [Section 2](#).

Official Language Proficiency. In accordance with Treasury Board policy, all positions are to be identified as being either bilingual or unilingual. Unilingual positions must be specified as either English essential, French essential, or English or French essential.

For bilingual positions, three general second language skills are recognized: reading, writing, and oral interaction. There are three levels of proficiency for each of these general skills, referred to as levels A, B, and C from lowest to highest. For bilingual positions, the second language skills required and the level of each skill must be identified. In addition, the code "P" may be required when specific language proficiency is specified. The use of code P is discussed below. The linguistic profile summarizes the language proficiency requirements (none, A, B, C or P) in each skill for both official languages.

For the criteria used in the determination of levels of official language proficiency for bilingual positions, consult [Determining the Linguistic Profile for Bilingual Positions](#) published by the Public Service Commission.

Bilingual positions may be staffed on an imperative or non-imperative basis. Imperative staffing means that the position must be filled by someone who meets the language requirements at the time of the appointment. Non-imperative staffing means that the position may be filled by a candidate who does not meet the language requirements but who is eligible for language training or is otherwise excluded.

For bilingual positions, the level of general second language proficiency (A, B, C) in each of the skills shall be evaluated using tests or other procedures prescribed by the Public Service Commission. These tests do not apply to unilingual positions and must not be used to assess language skills for unilingual positions. For some positions, certain duties and/or responsibilities that are to be performed in either French, or English, or both require specific language skills or proficiency, including:

- a. language-related skills normally acquired through specialized training (e.g., shorthand, text editing); or
- b. specialized or expert proficiency in one or both official languages (e.g., teaching English or French).

When such positions are identified as bilingual, a code P is required in the linguistic profile to denote the language or languages in which these skills or proficiency is to be assessed. The P code may or may not refer to a second language requirement. This will depend on the language of the candidate and the language in which the duties and/or responsibilities need to be performed. Code P requirements must be met prior to appointment in either imperative or non-imperative staffing, regardless of any exclusions from other language requirements.

Statement of Qualifications

The Statement of Qualifications will most often consist of a combination of different types of qualifications; there is no requirement, however, that every type of qualification mentioned in the list above be represented.

Qualifications should not be established for knowledge, abilities/skills, or other attributes which can only be acquired after appointment, either through a formal departmental training program or through the performance of a particular set of duties. In such cases, the capacity to acquire such knowledge, abilities/skills, or other attributes should be reflected either through relevant aptitudes or other qualifications.

In some cases, specifying a certain qualification implies possession of another qualification. For example, the ability/skill to apply knowledge may in some circumstances presuppose the possession of that knowledge. In such cases, specifying in the [Statement of Qualifications](#) both the possession of the knowledge and the ability/skill to apply this knowledge may be redundant.

Conditions of Employment

Medical suitability, security and reliability are conditions of employment which must be administered according to [Treasury Board policy](#). They must be met before appointment.



[Top of Page](#)

3. Choose or develop assessment methods

Standard: Assessment methods must provide information relevant to the qualification(s) being assessed.

A Selection Board is responsible to (7) choose or develop assessment methods in order to collect the information needed to evaluate the candidate(s) against the specified qualifications. In [section 2 of these Standards for Selection and Assessment](#), the use of specific assessment methods is prescribed for certain qualifications and for certain groups and levels.

The Selection Board will determine (8) the kind and amount of information sufficient to evaluate a given qualification or group of qualifications (9). The type, depth, breadth and importance of the qualification, as reflected on the Statement of Qualifications (10) will influence this judgement. In some situations, considering information from different methods or sources enhances evaluations. Multiple assessment methods or sources of information regarding the same qualification permit an evaluation of the consistency of performance (e.g., consistency over time, consistency across situations). Conversely, a single method/source can be used to assess a group of (11) qualifications.

Departments and agencies may develop assessment methods and choose sources of information according to their needs. All test development procedures must adhere to the guidelines set forth in the document entitled *Testing in the Public Service of Canada* published by the [Personnel Psychology Centre \(PPC\)](#) of the Public Service Commission. The application and use of tests of personality, interest, intelligence, or aptitude, or tests of like nature, including those commercially available, must be approved by the PPC. The authority to determine the nature of any test and to

approve the application and use of all of its own tests rests with the Personnel Psychology Centre of the Public Service Commission.

Assessment methods must treat all candidates in an equitable and non-discriminatory manner. Equitable assessment does not necessarily require the use of the same assessment methods or sources of information for all candidates, rather, accommodation of a candidate who is a member of a designated group ensures that each candidate is assessed according to his or her own personal characteristics rather than presumed group characteristics (12). For example, in some circumstances, such as sometimes occur in the assessment of candidates with disabilities, equitable assessment will require the modification of usual procedures. For more information on the assessment of persons with disabilities consult the brochure, [The Assessment of Persons with Disabilities](#), published by the PSC. In all cases, the use of different assessment methods or sources of information for different candidates must be justified on the basis that such differential usage provides for a more accurate assessment and that the information gathered from these different methods or sources is comparable. Accommodation in assessment methods must not give an undue advantage to the person receiving the accommodation.

The selection board should be constituted in such a way that a fair, transparent and equitable assessment takes place.

In determining fair and objective methods for assessing candidates' qualifications, departments and agencies may develop or purchase instruments known as "standardized tests".

A standardized test is a systemic procedure for sampling an individual's behaviour in order to evaluate job-relevant competencies. The procedure is systematic in five areas: development, content, administration, scoring and communication of results. The development of the test is in accordance with the guidelines set forth in Chapter 3 - Test Development and Revision of the document entitled Testing in the Public Service of Canada published by the Personnel Psychology Centre (PPC) of the Public Service Commission. The content of the test is equivalent for all test-takers. The test is administered according to standard instructions and procedures. The test is scored according to a set protocol and the test results are communicated in an appropriate manner.

A number of [standardized tests](#) ranging from tests designed to assess basic skills (e.g., written communication tests) to tests designed to assess leadership and managerial abilities for middle and senior manager positions (e.g., simulations and in-basket exercises) are available from the Personnel Psychology Centre (PPC) of the Public Service Commission.

Assessment Methods

Assessments will normally belong to use one or more of the following types:

- Interview;
- Samples of Previous Work;
- Simulation/Situational Exercise;
- Written Tests;
- Assessment Centre;
- Review of Past Accomplishments and Experience.

Interview. The term "interview" refers to direct communication between the assessor(s) and the candidate. Interviews range from unstructured conversations to sophisticated structured interview techniques.

Samples of Previous Work. An example of the work produced by the candidate in a current or previous job; for instance, to evaluate writing ability, a candidate may be asked to submit a report, a letter or an article that had been written in a current or previous job.

Simulation/Situational Exercise. This assessment method places the candidate in a situation that simulates the actual work environment and requires the candidate to perform important aspects of the actual job. Simulations can include individual exercises where the candidate is required to complete a task independently (e.g., a typing test, an "in-basket" test), or group exercises where the candidate is required to interact with others (e.g., a group discussion with peers, a presentation and discussion before selection board members). The in-basket and simulation exercises developed by the Personnel Psychology Centre of the Public Service Commission are examples of this approach.

Written Tests. May be used to assess various types of qualifications. Different formats are possible (e.g., multiple-choice, short answer, essay). The Personnel Psychology Centre of the Public Service Commission has developed a number of written tests for a variety of qualifications.

Assessment Centre. In this assessment method, multiple qualifications are assessed simultaneously, using multiple assessment methods, including one or more simulations. The candidate's performance is evaluated by a number of assessors. Assessment centre methodology is readily applicable to many kinds of positions and levels within an organization.

Review of Past Accomplishments and Experience. Many methods are available to collect information about a candidate's past accomplishments and experience: application forms, self-reports, résumés, performance appraisals, reference checks, supervisory checks, transcripts, samples of previous work, interview questions about the candidate's past, and personal knowledge of the candidate on the part of the selection board members. A combination of these methods is often used.

Definitions:

Job Performance refers to the achievement of goals or attainment of results over a period of time, including the manner in which and degree to which they were achieved and their effect(s) on the work environment.

Productivity/Recognition refers to recognized achievement in the form of authorship and editorship of published or unpublished reports, books, papers, or other communications resulting from:

- a. research, experimental development, or tasking associated with operational equipment and problems;
- b. operational research and scientific analysis;
- c. planning, analysis and evaluation of Canadian and foreign programs in research and development.

Productivity/Recognition also includes developmental work leading to the issue of patents, copyrights, or the creation of improved varieties, functions, or designs, and/or recognition by the professional community of the research environment.

A number of brochures that provide guidance on the use of various assessment methods have been published by the Public Service Commission. These [Assessing for Competence](#) brochures are available from the PSC on request.

4. Collect and integrate information

Standard: Assessment information must be collected and integrated in a way that will identify the best qualified candidate(s) or where applicable, qualified candidates.

After the set of qualifications required to perform the work has been determined by the manager and set out in the Statement of Qualifications (13), and the various assessment methods have been chosen or developed by the Selection Board, the Selection Board must collect and integrate (14) assessment information so that a judgement can be made on the competence of candidates.

These **Standards for Selection and Assessment** apply in the determination of merit pursuant to both [subsection 10\(1\) and subsection 10\(2\) of the PSEA](#). In applications subject to subsection 10(1), it is referred to as **relative merit**. In applications subject to subsection 10(2), it is referred to as **individual merit**. The manner in which the information is collected and integrated is the same but the manner in which it is used will differ as follows:

- a. for selection according to relative merit, the assessment information must be collected and integrated so as to determine which candidates are qualified and their order of merit. Assessing and ranking candidates as to their competence to perform the work of a position, group of positions or level within an occupational group, as applicable, requires combining all the relevant information into a final judgement. In the case of a competition, this final ranking is used to establish one or more eligibility lists.
- b. for selection according to individual merit, the assessment information needs only to be collected and integrated so as to determine whether a person meets the standard of competence established by the Commission and is therefore qualified to perform the work.

A standard of competence is comprised of:

- the statement of qualification(s);
- assessment methods that provide the information required so that a judgement can be made on the competence of a person; and,
- the cut-off score(s), on the numeric or narrative scale(s), that must be established so as to ensure that the successful candidate possesses the required degree of competency for a qualification(s) or combination of qualifications.

Any qualification, or combination of qualifications, can be used as a screening requirement at one stage or another of the selection process. With the exception of general second language skills, which must be assessed on a "meets/does-not-meet" basis only, any qualification used for screening at an earlier stage of the selection process can also be used in ranking candidates. Specific language-related skills and specialized or expert proficiency which involve the use of the "P" code in the linguistic profile of bilingual positions can be used for ranking purposes as abilities/skills even when they are to be evaluated in the candidate's second language.

Candidates may be eliminated from further consideration at any point in the selection process where they do not meet a required degree of competence on a qualification or combination of qualifications. Different assessment methods may be administered in an order that contributes to an effective selection process.

The selection board must determine the appropriate cut-off level or score for any qualification or group of qualifications, and (15) can express their decision in either a numeric or a narrative form. Absolute cut-off scores, applicable to all situations, do not exist. They are set on the basis of the particulars of the situation at hand, and reflect the relative weight of the qualification or group of qualifications (16). Cut-offs on qualifications must not fall below any established in [Section 2](#) of these Standards but when judged appropriate, higher cut-off scores may be specified.

Endnotes

1. [Asselin](#) - The mandate of the Commission is to ensure a selection according to merit. This change ensures that managers are also aware of the need to ensure that qualifications can ensure a selection according to merit. [\[back to 1\]](#)
2. [Meiorin](#) - The concept of bona fide occupational requirements is outlined in PSEA 12(4). This change expands on that section in accordance with the Meiorin decision "To show that the standard is reasonably necessary it must be demonstrated that it is impossible to accommodate individual employees sharing the characteristics of the claimant without imposing undue hardship on the employer". [\[back to 2\]](#)
3. [Nelson and Russell](#) - The decision outlines and confirms the role of the deputy head or his or her delegate in determining qualifications. "The manager has to decide what kind of qualifications the incumbent must have, and to what degree he or she must possess them." [\[back to 3\]](#)
4. [Nelson and Russell](#) - The decision outlines the role of the deputy head or his or her delegate in determining qualifications. [\[back to 4\]](#)
5. [Boucher and McBride, Leclerc](#) - Since the decision to use compensatory/non-compensatory qualifications and preferences relate to the establishment of qualifications, it is the manager's role to identify these criteria. [\[back to 5\]](#)
6. [Asselin](#) - This decision found that the review of qualifications is a Commission responsibility and cannot be delegated to an Appeal Board. In addition, the Court suggested that a review after the process is completed (i.e. at the appeals stage) is too late for effective corrective action. [\[back to 6\]](#)
7. [Nelson and Russell](#) - roles and responsibilities of the selection board. [\[back to 7\]](#)
8. [Nelson and Russell](#) - roles and responsibilities of the selection board. [\[back to 8\]](#)
9. [Marinaki, Boucher & McBride](#) - provides for global assessment by clarifying that a group of qualifications can be considered a single component for assessment purposes. [\[back to 9\]](#)
10. [Nelson and Russell, Boucher and McBride](#) - the role of the manager vs the role of the Selection Board. [\[back to 10\]](#)
11. [Marinaki, Boucher & McBride](#) - provides for global assessment by clarifying that a group of qualifications can be considered a single component for assessment purposes. [\[back to 11\]](#)
12. [Grismer](#) - The Meiorin test requires those governed by human rights legislation to accommodate the characteristics of affected groups within their standards. Accommodation ensures that each person is assessed according to his or her own personal abilities rather than presumed group characteristics. Generic assessment tools may not be adequate. [\[back to 12\]](#)
13. [Nelson and Russell, Boucher and McBride](#) - the role of the manager vs the role of the Selection Board. [\[back to 13\]](#)
14. [Nelson and Russell](#) - roles and responsibilities of the selection board. [\[back to 14\]](#)

15. [Nelson and Russell](#) - roles and responsibilities of the selection board. This decision deals with the issue of the selection board changing the pass mark on a standardized test. While the Court found that the board erred in not notifying potential candidates of the change to the pass mark, the authority of the selection board to set the pass mark was not questioned. [[back to 15](#)]
16. [Boucher and McBride](#), [Nelson and Russell](#) - roles and responsibilities of the selection board and the manager - the manager establishes qualifications and their relative weight and the selection board establishes assessment methods and cut-off scores to evaluate candidates against those criteria. [[back to 16](#)]
17. [Carty](#) and [Mercer](#) – The Federal Court of Appeal confirmed the principle that the establishment of qualifications (such as knowledge, abilities and personal suitability) and the specific elements of each qualification is the sole responsibility of deputy heads – including the right to determine which of the elements are compensatory or non-compensatory. [[back to 17](#)]

[Standards for selection and assessment - Index page](#)

Last updated: 2005-07-13

http://devmain.psc-cfp.gc.ca/staf_dot/stand_selec/generic_e.htm

Canada 