



INSTRUCTIONS

General Considerations

The competency modeling process uses the tabbed worksheets from left to right, starting with "Planning" and ending with "Parts."

FIRST, enter the *Job Title and Class Code* at the top of the "Planning" worksheet. This will fill in the Job Title sections of the other worksheets.

Protected Cells. The cells of the worksheets are protected from changes except for the ones that are to be filled in by the HR Analyst or SME.

If the **SORT** buttons do not work, it is likely due to the macro security setting in Excel. To change these, do the following: Tools -> Macro -> Security -> Low. You will need to close, then reopen Excel for the change in settings to take effect.

PLAN

Use this sheet to plan the analysis. Determine the number and location of positions, the recency of existing analyses of the classification, and the level and manner of analysis that will be performed.

Print out this sheet for review by a Senior Human Resources Analyst before beginning the analysis.

SME

The purpose of this worksheet is to document the participation of subject matter experts (SME) in the competency modeling and examination planning.

Ordinarily, each SME will have completed an SME qualifications statement and signed a confidentiality form. The information pertaining to this sheet may be obtained from the SME qualifications forms.

DUTY

The purpose of this worksheet is to identify the most critical and central duties of the classification. Duties may be copied from the class description, and steps for doing this are in the yellow box at the top of the worksheet. Hitting the SORT button after pasting duties will remove the blank cells from the list and arrange the duties in alphabetical order. Duties may be added at the bottom of the list, or re-worded as needed.

Duties are then rated on their criticality and frequency. Each scale ranges from 0 to 3. In the background, a "Part-of-Job" index is calculated as a percentage based upon the product of the criticality rating and the frequency rating for each duty divided by the sum products across all duties.

After the duties are rated, hitting the SORT button will arrange the duties in order of the Part of Job Index. **Using the SORT button is required before moving on to the Competencies and Links worksheets.**

COMPETENCY The purpose of this worksheet is to identify the most critical competencies for the classification AND the examination. The object is to identify the most critical few rather than all that could be relevant to the job. Ideally, there will be fewer than 15 competencies with ratings of 3 or 2. Competencies can not be added or reworded on this worksheet.

First assign a criticality rating for each competency. If the competency is not important, the criticality rating can be left blank. Next determine the behavioral and contextual levels of the competencies that have been rated.

After criticality ratings are assigned, hitting the SORT button will arrange competencies in order of their criticality. This sorting process may be used iteratively to keep track of how many competencies are at each rating level. **Using the SORT button is required before moving on to the Links worksheet.**

If a competency must be added to the linkage matrix AFTER the linkage work has begun, rate the competency at some decimal below the existing cut-off level, hit the SORT button, then change the cut-off level on the linkage sheet. This procedure will place the added competency at the end of the list without disturbing the linkage rating already assigned to the other competencies.

If a competency is to be deleted from the linkage matrix, and the linkage work has begun, simply delete the rating on this sheet, and DO NOT SORT. This procedure will leave a gap on the linkage matrix, but preserve the existing linkage relationships.

LINKS The purpose of this worksheet is to establish the relationship of each critical competency to each critical duty and to use these linkages as the basis for validating and weighting the competencies. Complete the ratings on this sheet AFTER Duties and Competencies are rated and sorted. **Any changes to either the Duties or Competencies worksheets after linkage ratings have begun will require that the linkage ratings be done over.**

Cut-offs for both competency ratings and duty part-of-job indexes are set in the cells in the upper left corner of the worksheet. These cut-offs will limit the number of duties and competencies to be linked.

The FIT button will enable the duties to fit neatly into the cells.

As linkage ratings are assigned, the weights of the competencies are automatically calculated at the top of the worksheet. The weights are based upon the sum of the linkages for each competency across the duties, calculated as a percent of the total linkages across all competencies and duties.

PARTS The purpose of this worksheet is to establish the links between the competencies and the assessment methods that will be used to measure them.

First, press the "Sort by Weight" button to reorder the competencies in descending order.

Second, list the assessment methods as column headings where indicated.

Third, determine how each competency will be assessed, and type in the competency weight in the corresponding cell. A qualifying competency would be given a "0" weight in the test part. Otherwise leave the column blank.

Fourth, if a competency is assessed by more than one method, divide the competency weights among the methods. The weights need not be equally divided. Greater competency weight may be assigned to the method that assesses it more thoroughly or completely.

If a competency is omitted at this stage from the exam plan, label a column, "PROBATION" and assign the competency a "0" weight in the exam plan. **The omitted competency, along with the others, will be assessed in the probationary period for those hired or promoted.**

WRITTEN

This sheet is provided as an aid in developing WRITTEN TEST SPECIFICATIONS. Written test specifications ensure that the test covers the important topics for duty performance and ensures that the topics are weighted in the test in roughly the same proportion that they are weighted in job performance.

The duties that exceed the importance weight set on the LINKS page will appear as column heading on this page. You will list the knowledge topics that have been generated through an SME process (interviews, focus groups, etc.). Topics should be specific enough to be a detailed test outline. The topics should be independent of each other; that is, not sub-topics to other topics. To group topics, preface each topic with a letter to designate the grouping (A. B. C. etc.). With the SMEs as your guide, you will determine the relevancy/complexity of each topic to the performance of each of the duties. These ratings will be: 0, 1, or 2. The percentage weight for each topic will be automatically calculated as you go.

To transfer the weights to the test do one of the following. Option 1: Base the number of items on each topic according to the topics weight. If you place the total number of items for the test in cell B2, the number of items per topic will be automatically calculated. This option is preferred when the test design has several topics (>10) and relatively few items per topic (<5). Option 2: Divide the topic weight by the number of items on the topic to determine the scoring weight for each item. This option is preferred when the test design has few topics (<5), and there are several items per topic (>10). If the items weights are fairly close, no differentiation of item weights is needed.

INTEVIEW

This sheet is provided as an aid in developing the INTERVIEW SPECIFICATIONS. Interview specifications show the intended discussion areas and how each will shed light on each of the competencies that are the focus of the interview.

Delete the competencies that are not included in the interview and cut and paste (or drag) the remaining competencies to eliminate the blank columns. Because columns are "locked," you can not simply delete columns.

As you generate discussion areas, show with an "x" the intended competency focus of each area. There is a counter at the top of each competency column showing the number of opportunities to observe the competency across discussion areas. In addition the total number of observation opportunities are counted in the upper left cell of the sheet.

DO NOT LIST ACTUAL INTERVIEW QUESTIONS AND PROBES. ACTUAL QUESTIONS ARE LEVEL 3 TEST CONTENT AND CAN NOT BE STORED IN THIS COMPETENCY MODELING ELECTRONIC FILE.

Lastly, you can control the order of the discussion areas by numbering them in the first column and hit the "Arrange" button.

SIMULATION

This sheet is provided as an aid in developing the SIMULATION SPECIFICATIONS. Simulation specifications show the intended design elements of the simulation and the relationship of each element to the competencies that are the focus of the simulation.

Delete the competencies that are not included in the simulation and cut and paste (or drag) the remaining competencies to eliminate the blank columns. Because columns are "locked," you can not simply delete columns.

As you generate design elements, show with an "x" the intended competency focus of each area. There is a counter at the top of each competency column showing the number of opportunities to observe the competency in the simulation. In addition the total number of observation opportunities are counted in the upper left cell of the sheet.

DO NOT DESCRIBE THE ACTUAL CONTENT OF THE SIMULATION. ACTUAL CONTENT IS LEVEL 3 TEST MATERIAL AND CAN NOT BE STORED IN THIS COMPETENCY MODELING ELECTRONIC FILE.

Lastly, you can control the order of the discussion areas by numbering them in the first column and hit the "Arrange" button.

ANALYSIS PLANNING SHEET

Target Job for Analysis	Employee Benefits Specialist
Class Code	HR-0001
Date	
Analyst-in-charge	
Team	
Team Leader Review	

What is the status of the existing job analysis or competency modeling?

	check	Comment
Recent and thorough	<input type="checkbox"/>	
Should be revised/updated	<input type="checkbox"/>	
None exists - new class	<input type="checkbox"/>	
Other (describe)	<input type="checkbox"/>	

Position information

Num	Main Locations
1	Human Resources

SME's desired

Num	Type

Manner of analysis

	check	Comment
Individual card sort	<input checked="" type="checkbox"/>	
Individual interview	<input type="checkbox"/>	
Group card sort	<input type="checkbox"/>	
Group interview	<input type="checkbox"/>	
Other	<input type="checkbox"/>	

Notes

Criticality:
 3=Crucial, 2=Important, 1=Useful
 0=NA

Frequency:
 3=Frequent, 2=Sometime, 1=Infrequent
 0=NA

Employee Benefits Specialist			75.00
HR-0001	CRIT	FREQ	POJ
Notifies employees of eligibility changes; prepares change records and distributes to employees	3	3	12%
Assists in maintaining and updating records of costs and provisions of policies, contracts, and statistics	3	3	12%
Assists employees in enrolling in insurance programs offered by the District	3	2	8%
Assists in the coordination of the annual open enrollment including notification to employees, distributing material and receiving applications for changes	3	2	8%
Collects all consent materials relating to personnel actions for covered employees	2	3	8%
Enrolls and deletes employees from benefit plans when eligibility changes	3	2	8%
Greets and screens telephone callers and visitors in a pleasant and helpful manner	3	2	8%
Maintains harmonious operating conditions in a service-oriented educational environment serving a multicultural and multiethnic population	3	2	8%
Resolves routine work problems involving benefit programs by using established procedures; refers difficult problems and policy questions to the appropriate individuals	3	2	8%
Assist with the administration of the District's COBRA plan	2	2	5%
Maintains inventory of benefit material and literature and distributes to employees as requested.	2	2	5%
Performs a variety of independent clerical duties related to the implementation of District health benefit and insurance programs	2	2	5%

Criticality:
 3=Crucial, 2=Important, 1=Useful
 0=NA

Frequency:
 3=Frequent, 2=Sometime, 1=Infrequent
 0=NA

Employee Benefits Specialist			75.00
HR-0001	CRIT	FREQ	POJ
Receives, reviews and processes mail using discretion in the handling of confidential and sensitive material	1	2	3%
May contact insurance carriers regarding employee claims	1	1	1%
			0%
			0%
			0%
			0%
			0%
			0%
			0%
			0%
			0%
			0%
			0%

3=Crucial, 2=Important, 1=Useful, 0=N/A

Employee Benefits Specialist		
HR-0001		
Type	Competency	CRIT
B. Occupational	Professional/Technical Expertise	3
B. Occupational	Using Technology	3
C. Personal Effectiveness	Action & Results Focus	3
C. Personal Effectiveness	Attention to Detail	3
E. Interpersonal	Customer Focus	3
A. Reasoning	Gathering and Analyzing Data	2
B. Occupational	Continuous Learning	2
B. Occupational	Industry Awareness	2
B. Occupational	Legal and Regulatory Navigation	2
D. Communication	Oral Communication	2
A. Reasoning	Critical Thinking and Problem Solving	

3=Crucial, 2=Important, 1=Useful, 0=N/A

Employee Benefits Specialist		
HR-0001		
Type	Competency	CRIT
A. Reasoning	Decision Making	
A. Reasoning	Design Sense	
A. Reasoning	Mathematical Agility	
A. Reasoning	Mechanical Insight	
A. Reasoning	Reading Comprehension	
B. Occupational	Environmental Exposure Tolerance	
B. Occupational	Physical Ability	
C. Personal Effectiveness	Adaptability	
C. Personal Effectiveness	Handling Stress	
C. Personal Effectiveness	Innovation	
C. Personal Effectiveness	Integrity and Ethics	

3=Crucial, 2=Important, 1=Useful, 0=N/A

Employee Benefits Specialist		
HR-0001		
Type	Competency	CRIT
C. Personal Effectiveness	Safety Focus	
C. Personal Effectiveness	Self Management	
D. Communication	Bilingual Facility	
D. Communication	Informing	
D. Communication	Presentation Skill	
D. Communication	Writing	
E. Interpersonal	Handling Conflict	
E. Interpersonal	Influencing	
E. Interpersonal	Involving Others	
E. Interpersonal	Negotiating	
E. Interpersonal	Professional Impact	

3=Crucial, 2=Important, 1=Useful, 0=N/A

Employee Benefits Specialist		
HR-0001		
Type	Competency	CRIT
E. Interpersonal	Relationship Building	
F. Group	Assessing Talent	
F. Group	Cultural Proficiency	
F. Group	Developing Others	
F. Group	Empowering Others	
F. Group	Group Facilitation	
F. Group	Leadership	
F. Group	Managing Performance	
F. Group	Teamwork	
G. Organizational	Fiscal Acumen	
G. Organizational	Leveraging Technology	

3=Crucial, 2=Important, 1=Useful, 0=N/A

Employee Benefits Specialist		
HR-0001		
Type	Competency	CRIT
G. Organizational	Managing Change	
G. Organizational	Organizational Design and Structure	
G. Organizational	Organizational Savvy	
G. Organizational	Process Improvement	

Cut-offs		Employee Benefits Specialist															
Comp	2.00	Weights	12%	12%	12%	17%	17%	7%	5%	6%	6%	8%	0%	0%	0%	0%	0%
Duty	5%	Competency Level	3	3	3	3	3	2	2	2	2	2					
Duty Part-of-Job Index		<p>To what extent does the competency DISTINGUISH EXCELLENCE in the performance of the duty?</p> <p>2 = KEY DRIVER - GREATEST VALUE 1 = IMPORTANT FACTOR q = NEEDED BUT NOT A DIFFERENTIATOR</p> <p>Blank/0 = Not a factor in performing the duty</p>	Professional/Technical Expertise	Using Technology	Action & Results Focus	Attention to Detail	Customer Focus	Gathering and Analyzing Data	Continuous Learning	Industry Awareness	Legal and Regulatory Navigation	Oral Communication					
12%	Notifies employees of eligibility changes; prepares change records and distributes to employees	1	1	2	2	2						1					
12%	Assists in maintaining and updating records of costs and provisions of policies, contracts, and statistics	1	1		2			2	1	2	2						
8%	Assists employees in enrolling in insurance programs offered by the District	2	2		2	1				1		1					
8%	Assists in the coordination of the annual open enrollment including notification to employees, distributing material and receiving applications for changes	2	1	2	1	2						1					
8%	Collects all consent materials relating to personnel actions for covered employees			1	1	1											
8%	Enrolls and deletes employees from benefit plans when eligibility changes		1			1											
8%	Greets and screens telephone callers and visitors in a pleasant and helpful manner			1		2						2					
8%	Maintains harmonious operating conditions in a service-oriented educational environment serving a multicultural and multiethnic population					2						1					
8%	Resolves routine work problems involving benefit programs by using established procedures; refers difficult problems and policy questions to the appropriate individuals	2		2		2	2	1			1						
5%	Assist with the administration of the District's COBRA plan	2	2		2			1	2	2	1						
5%	Maintains inventory of benefit material and literature and distributes to employees as requested.				2												
5%	Performs a variety of independent clerical duties related to the implementation of District health benefit and insurance programs		2	1	2												
0%																	
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Employee Benefits Specialist

TEST NAME HERE

Total Items		Part of Job Index	12%	12%	8%	8%	8%	8%	8%
# of items	Test Topic Weight	<p>List the topic and rate its value in performing the duty.</p> <p>2 = Essential 1 = Important - include among other topics 0 = N/A or Esoteric</p>	Notifies employees of eligibility changes; prepares change records and distributes to employees	Assists in maintaining and updating records of costs and provisions of policies, contracts, and statistics	Assists employees in enrolling in insurance programs offered by the District	Assists in the coordination of the annual open enrollment including notification to employees, distributing material and receiving applications for changes	Collects all consent materials relating to personnel actions for covered employees	Enrolls and deletes employees from benefit plans when eligibility changes	Greets and screens telephone callers and visitors in a pleasant and helpful manner
	0	0.00							
	0	0.00							
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	0	0.00							

Employee Benefits Specialist		TEST NAME HERE							
Total Items	Part of Job Index	8%	8%	5%	5%	5%	0%	0%	
# of items	Test Topic Weight	<p>List the topic and rate its value in performing the duty.</p> <p>2 = Essential 1 = Important - include among other topics 0 = N/A or Esoteric</p>	Maintains harmonious operating conditions in a service-oriented educational environment serving a multicultural and multiethnic population	Resolves routine work problems involving benefit programs by using established procedures; refers difficult problems and policy questions to the appropriate Assist with the administration of the District's COBRA plan		Maintains inventory of benefit material and literature and distributes to employees as requested.	Performs a variety of independent clerical duties related to the implementation of District health benefit and insurance programs		
	0	0.00							
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