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DEPARTMENT OF PSYCHOLOGY



Documenting for Defensibility

A template and review of the documentation process in job analysis.

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Job Analysis

- The process by which organizations capture information about a specific position
- Organizations rely on the job analysis as the basis for many human resource activities
- Outcomes of activities based on job analysis are often scrutinized by applicants, employees, and government agencies

(Brannick, Levine, & Morgeson, 2007).



Documentation

“The dullest pencil is better
than the sharpest
memory.”—Mark Twain



The methodology, data collection methods, analyses, results, and implications for the validation effort should be documented. Frequently, this documentation will include a description of the major work activities, important worker requirements and their relationships to selection procedure content, and scoring when appropriate.

The documentation should provide sufficient detail for another researcher to replicate the work analysis process. The documentation should also help the researcher understand the role of the work analysis as the foundation for any validation efforts.



Documentation Phases:

- Before
- During
- After



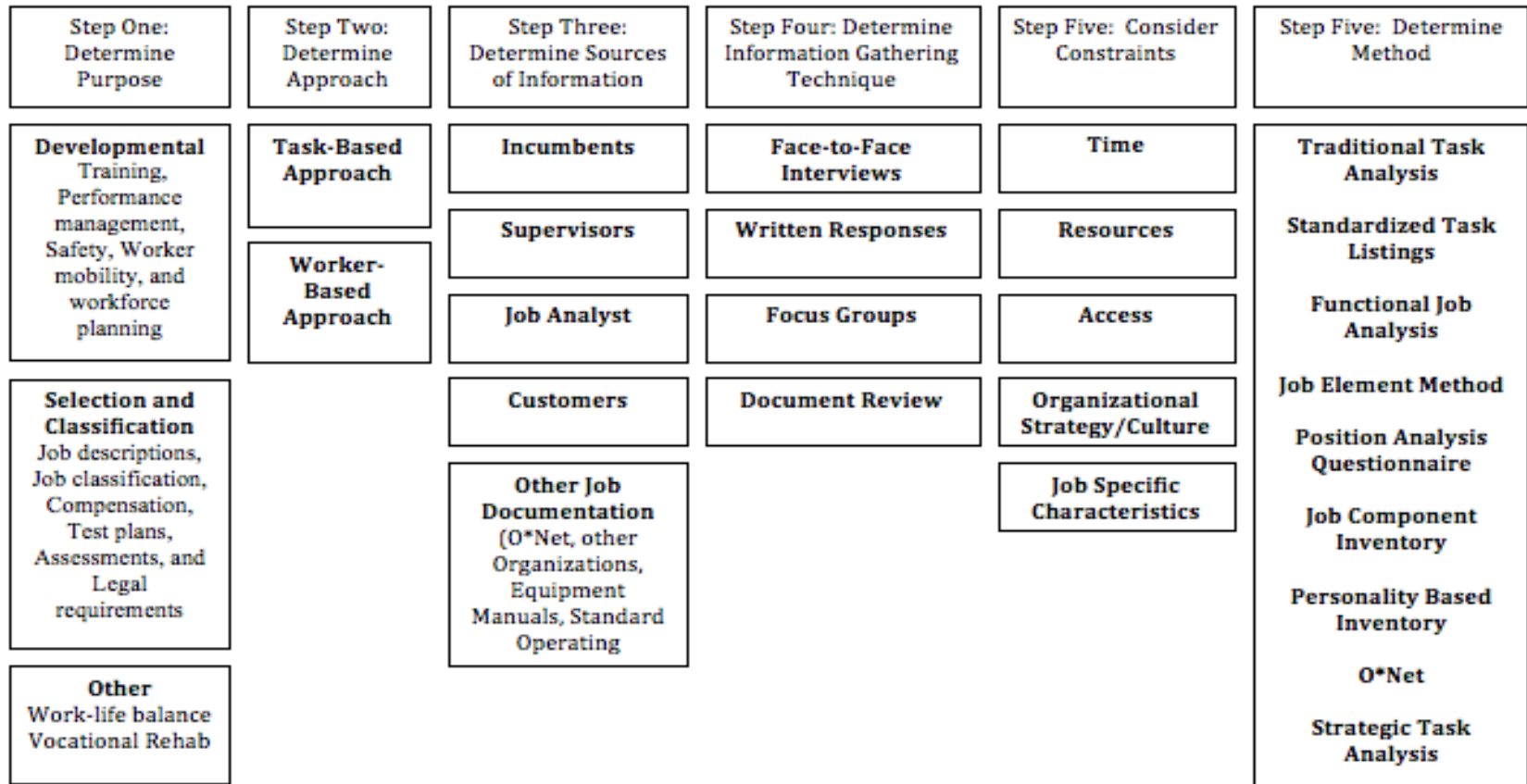
Before

- Historical context
- Intended use
- Decision making
- Timeline for implementation



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Purpose

- Developmental
 - Training
 - Performance Management
 - Workforce Planning
- Selection and Classification
 - Job Descriptions
 - Compensation
 - Testing
 - Legal Requirements

(Sackett, 1991)



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Tasks

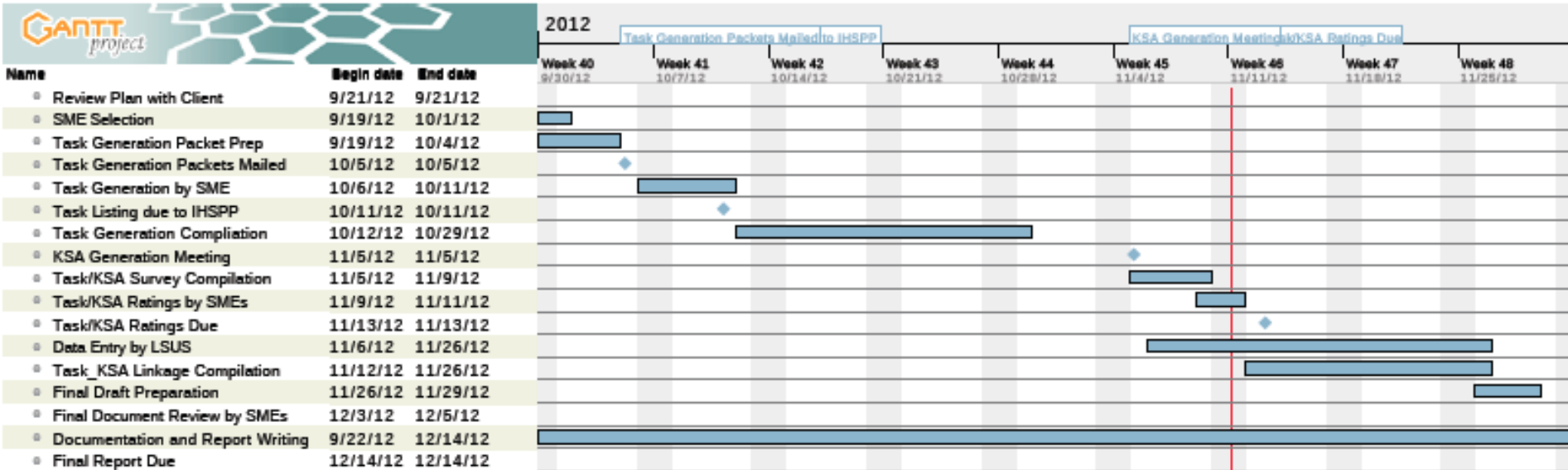
Name	Begin date	End date
Review Plan with Client	9/21/12	9/20/12
SME Selection	9/19/12	10/1/12
Task Generation Packet Prep	9/19/12	10/4/12
Task Generation Packets Mailed	10/5/12	10/4/12
Task Generation by SME	10/6/12	10/11/12
Task Listing due to IHSP	10/11/12	10/10/12
Task Generation Compilation	10/12/12	10/29/12
KSA Generation Meeting	11/5/12	11/4/12
Task/KSA Survey Compilation	11/5/12	11/9/12
Task/KSA Ratings by SMEs	11/9/12	11/11/12
Task/KSA Ratings Due	11/13/12	11/12/12
Data Entry by LSUS	11/6/12	11/26/12
Task_KSA Linkage Compilation	11/12/12	11/26/12
Final Draft Preparation	11/26/12	11/29/12
Final Document Review by SMEs	12/3/12	12/5/12
Documentation and Report Writing	9/22/12	12/14/12
Final Report Due	12/14/12	12/13/12



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Gantt Chart





During

- Demographics of SMEs (self-report and HR)
- Notes
- Attendance sheets
- Completion rates, times, input from JAQ
- Roadblocks, disagreements
- Data decision rules
- Team-member Narratives



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Sample Demographic Form

Name: _____

Title: _____ Data# _____

Department _____

Age: _____ Sex: M F Race: _____

Date of Hire: _____

Date of last promotion: _____

Highest level of education earned (Circle one):

High School or GED Some College Associate's Degree

Bachelor's Degree Graduate Degree

Please briefly describe your responsibilities, including any specializations:



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The completion of this document is strictly limited to you as an authorized subject matter expert and you agree that while completing the enclosed forms, you will use your best judgment, be truthful, and accurately represent your position. These documents and any files transmitted with it are confidential and intended solely for the use of the individual or entity to which they are addressed. If you have received this document in error, please notify _____ at _____. If you are not the named addressee, you should not disseminate, distribute, or copy these documents.



SME Information (from HR)

- Years of service
- Prior experience
- Training experience
- Performance review data
- Commendations or disciplinary actions
- Others?



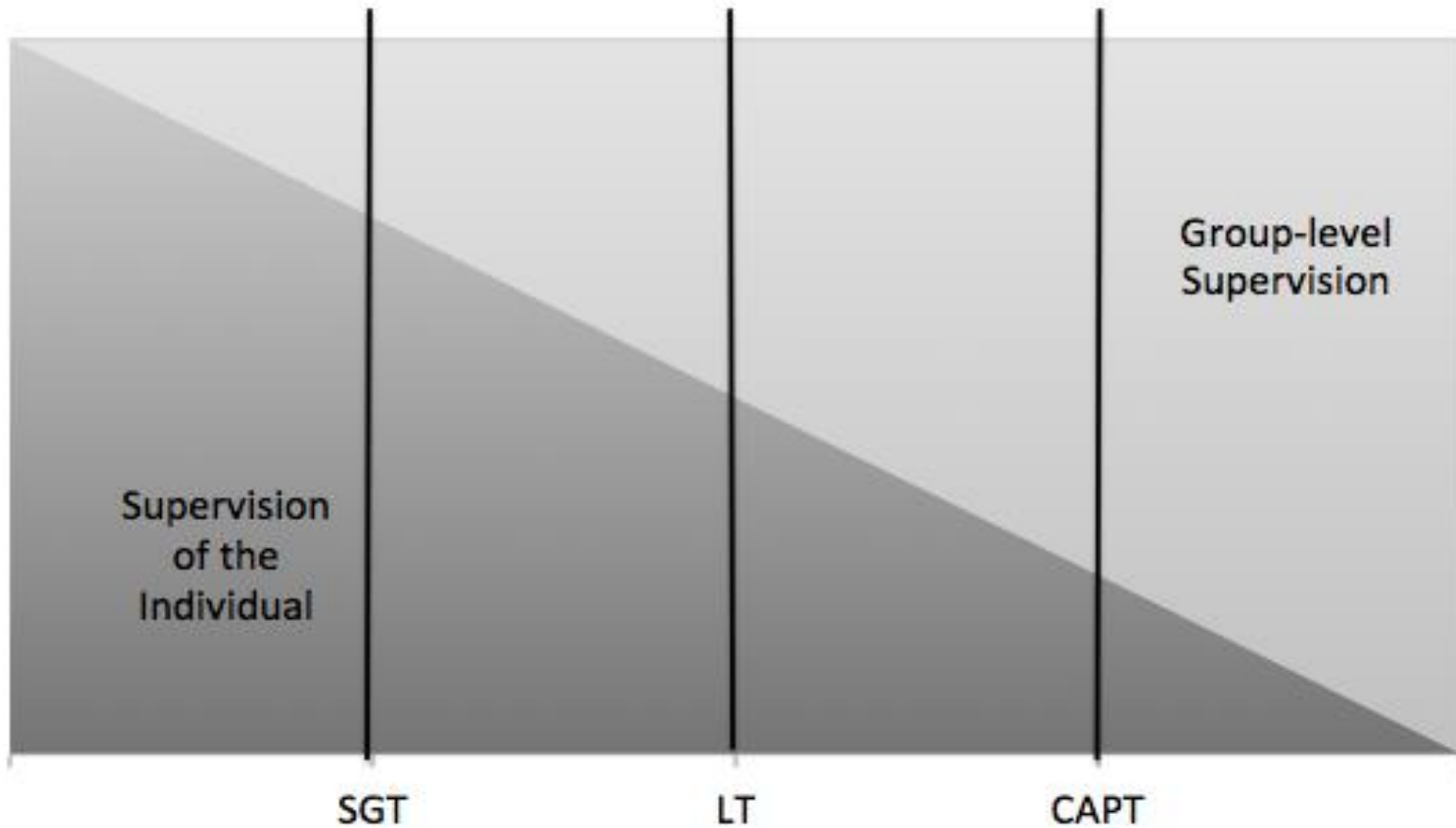
After

- Organizational charts
- Graphics to illustrate themes in job analysis
- Demographics of SMEs, participation rates
- All generated information, including those eliminated
- Final document (i.e. job description)
- Statistical results from the analysis
- Post-hoc review (what worked/what didn't)



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Retention Guidelines

- Organizational guidelines
- Rule of thumb: during use of the instrument + statute of limitations for claims
- Example:
- State of Ohio: Retain 7 years after position filled or decision not be filled is made.



Template for final document

- Historical context
- Outline of procedures taken
- Any anomalies/changes to plan
- Demographics of SMEs
- Attendance records, minutes of meetings
- Explanatory graphics
- All information generated, ratings
- Final documents
- Statistical analyses



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Questions or Comments?