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Guide to Writing Work Descriptions for the Executive Group

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Introduction

The purpose of this guide is to provide a framework for writing *concise* work descriptions for Executive (EX) Group positions for the determination of the classification level. This guide focuses on developing a work description that incorporates the three factors used to measure the work under the EX Group Classification Plan:

- ▶ Know-how: The practical, technical and specialized managerial and human relations knowledge and skill required;
- ▶ Problem solving: The independence and complexity of the thinking required to solve problems; and
- ▶ Accountability: The degree to which the job is answerable for actions and the level of influence on the results of actions.

Work descriptions completed using this guide will enable the supervisor and incumbent to identify training needs, performance objectives and staffing requirements. The guide is particularly useful not only when creating a new position, but also when updating a work description resulting from an important program change or a reorganization.

The guide follows an eight-step process to gather the relevant information and complete the various parts of the work description. A sample work description has been used to illustrate what information is required in each step. In addition, helpful appendices are attached to this guide that offer an information checklist and potential pitfalls to avoid.

Writing the Work Description

Step 1: Gathering the Relevant Information

An executive work description consists of seven parts:

1. Position identification;
2. General accountability;
3. Organizational structure;
4. Nature and scope;
5. Dimensions;
6. Specific accountabilities; and
7. Signature block.

The first step in writing the work description is gathering the information that will be used to complete the various parts of the EX work description. Several sources may be used to gather the information: meetings with the incumbent and/or supervisor, departmental planning and reporting instruments, the organization's work plans, and supervisor and colleague work descriptions, etc. The following list indicates the main areas of information required:

- ▶ The major responsibilities of the position, including program or legislative responsibilities;
- ▶ The authority or assistance involved in carrying out those responsibilities;
- ▶ The peer, superior and subordinate relationships of the position;
- ▶ Where the position fits in the organizational unit;
- ▶ The major challenges of the position;
- ▶ The dimensions of the position (in dollar terms); and
- ▶ Any unique circumstances that may affect the position.

Note: Appendix A offers a structured methodology for gathering this information.

Step 2: Identifying the Position

The second step consists of filling in the identifying ("tombstone") information:

- ▶ Position title: Official title of the position;
- ▶ Position level: Approved or proposed classification level;
- ▶ Department/agency: Department/agency name;
- ▶ Branch/sector: Organizational unit name;
- ▶ Effective date: The day, month and year the duties came into effect;
- ▶ Position number: The official number (usually assigned by Human Resources); and
- ▶ Location: The geographical location name or code.

Step 3: Summarizing the General Accountability Statement

This step consists of summarizing in one or two sentences the overall responsibility of the position. The statement should express the primary purpose and essential accountability of the position in clear and very concise terms. The statement should clearly distinguish the job from others, in particular, those of the supervisor, subordinates and colleagues.

Example of a general accountability statement

Director General, Human Resources
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Accountable for providing corporate leadership in formulating and integrating human resources (HR) management policy and planning frameworks and processes into departmental management practices to support the Department's strategic and operational goals, and directing the provision of HR management services across the Department.

Step 4: Building the Organizational Structure

The fourth step aims to illustrate how the position fits within the organizational structure. It should also show how subordinate staff is organized and their general accountability. First, it should list all of the executive positions reporting to the supervisor; then it should list the positions reporting to the subject position, including their titles, number of staff and a general accountability statement.

Example illustrating how the position fits in the organizational structure

The **Director General, Human Resources** is one of nine senior executive positions at the first managerial level reporting to the Deputy Minister. The others are Assistant Deputy Minister, Operations; Assistant Deputy Minister, Policy and Program Development; Assistant Deputy Minister, Strategic Directions and Communications; Assistant Deputy Minister, Centralized Service Delivery and Corporate Services; Assistant Deputy Attorney-General; Ombudsman; Executive Director, Global Case Management System Business; and Director, Client Service Project.

Reporting to the **Director General, Human Resources** are four positions as follows:

Director, Learning and Development (staff of 31) is responsible for developing and directing the implementation of the Department's learning framework, which promotes the continuous development and expansion of individual competencies and the creation of a supportive learning environment, and addresses clear and ongoing linkages with the Department's business planning process; developing change management strategies that support the implementation of renewal projects, policies, programs and operations; directing the evaluation of the effectiveness of training and development interventions; and managing developmental programs.

Director, Strategic Resourcing (staff of 38) is responsible for developing departmental HR management policies and service delivery frameworks in all HR disciplines; guiding the implementation of headquarters and regional HR operations officers and staff; providing operational services for non-delegated and Executive Group classification and staffing; managing the planning and development of HR information systems; introducing new technologies to the sector; advising managers and HR officers at all levels; and representing the Department to central agencies and other government departments.

Director, Client Services (staff of 37) is responsible for developing and implementing operational systems and procedures to provide HR services to managers and staff at headquarters, including the International Branch and its overseas operations in all HR areas; and coordinating various promotional events.

Director, Workforce Effectiveness (staff of 20) is responsible for planning, developing, administering and monitoring corporate policies, processes and procedures for the Department in all HR disciplines; providing specialized professional services and advice to corporate and regional management on grievances, collective bargaining, designations, exclusions and union-management relations; and coordinating investigations of malfeasance in Canada and abroad with the RCMP and Foreign Affairs and International Trade Canada.

Step 5: Developing the Nature and Scope

This step consists of providing a clear and *concise* overview of the nature and scope of the major responsibilities of the position. The sequence of information below may be a helpful guide for organizing the information.

1. Where the position fits in the flow of work: Provide a *brief* description of the departmental/agency mandate and of any unique economic, constitutional, environmental or technological aspects of the position.
2. What the position does: Describe the main functions performed by the position as distinguished from those performed through subordinates or together with others.
3. Obstacles to be overcome: Specify the greatest technical and managerial challenges of the position, and then outline the nature and variety of the most typical problems. Provide examples as appropriate.
4. The nature and source of controls on the position: Indicate the types of problems that must be referred to a superior for resolution or approval. Also, specify what authority the position has for acting under the relevant legislation, as well as the authority the position has for selecting/assigning personnel, purchasing supplies and services, etc.
5. Contacts inside and outside the department/agency: Outline the most significant internal and external contacts of the position (including the frequency and purpose of these contacts). Include information about the types of problems on which the position must consult with others and the committees in which the position participates.
6. Other information: For staff positions (i.e., non-operational), it is important to make clear the following:
 - Where the work comes from (assigned by the superior, routine work flow, referral from other departments or self-initiated);
 - What actions are taken by the position (the practical, technical or specialized depth of knowledge required, and the types of problems dealt with); and
 - What the end results are (decisions, recommendations, reports, etc.).

Since this is the narrative portion of the job description, the length will vary. Even with tight, concise writing, it may be up to two pages. Use simple language and the *active* voice to make the description as clear as possible, as in the following example.

Example of the nature and scope of the position

Director General, Human Resources

The Department is a highly decentralized organization located in five domestic regional offices, a network of service centres across Canada and a large number of points of service abroad. Headquarters provides centralized program direction and coordination, including the management of centralized processing centres located outside the National Capital Region.

The Director General, Human Resources (DGHR) is responsible for developing and championing strategic and governance frameworks, as well as defining short- and long-term approaches to the implementation of policies, systems and operational processes supporting the HR management requirements of departmental management, which involve two distinct populations: rotational foreign service officers and domestic non-rotational staff. Owing to its complex domestic and international mandate, the Department must strategically plan and implement distinct systems of personnel management that meet the requirements of rotational staff involved in service delivery abroad, non-rotational staff working under terms and conditions identical to the rest of the public service located in all parts of the country, and locally engaged staff working to deliver programs in missions worldwide. This workforce composition poses multiple and unique challenges that require a high level of leadership and influence from the DGHR in addressing cultural, geographical and renewal issues. The DGHR develops collaborative relationships with Foreign Affairs and International Trade Canada in selecting and assigning rotational and locally engaged staff.

A major challenge for the DGHR is to develop and implement an integrated HR strategy, as well as an HR governance structure for the Department. Leading the implementation of the strategic plan requires the incumbent to obtain approval from all departmental levels and geographic regions to accept and integrate clear accountability and leadership for effective HR management. Based on clear requirements for establishing an HR renewal process that addresses distinct and pressing needs for targeted recruitment, professional development, greater delegation to management and more professional HR practitioners, the incumbent makes recommendations to the Deputy Minister on the departmental HR agenda in order to ensure that corporate HR objectives are met. The incumbent provides critical leadership and change agent roles in supporting HR program and operational policies through the departmental strategic directions.

Another challenge for the DGHR is to provide sustained leadership to the Department's Human Resources Renewal Agenda. In articulating and advancing the Department's renewal strategy, the incumbent is called upon to build strong linkages between leadership, learning, networking and communications and to incorporate government-wide initiatives to modernize HR management. The incumbent leads the development and implementation of strategic goals that increase opportunities for sharing best practices; continues to use information and technology to improve services to clients; introduces or enhances partnerships with other government organizations; develops new management tools; and addresses workplace concerns expressed by employees.

The DGHR leads the development of a recruitment, promotion and retention framework that guides the implementation of headquarters and regional approaches to meeting the Department's top priority to renew its workforce and its commitment to developing a highly skilled, flexible workforce that can support the Department's evolving role and responsibilities. The incumbent provides a corporate focal point for the development of common resourcing tools, such as competency-based selection profiles for key operational and policy positions, enhancement of the departmental succession planning process and strengthening the departmental HR planning process through stronger linkages to the departmental strategic analysis and planning mechanisms.

The DGHR provides professional and managerial leadership for the development and implementation of a Department-wide learning framework that addresses three broad areas: common objectives or competencies on which to base departmental training programs; clearly defined roles and responsibilities for managers and employees at headquarters and regions; and clear and ongoing linkages with the business planning process to ensure that learning plans reflect evolving departmental priorities. The incumbent must ensure that learning opportunities not only address the operational training required for employees to do their current jobs efficiently and effectively, but also foster the acquisition of generic skills that prepare employees for future challenges within the Department and permit them to compete in the open marketplace.

The DGHR provides recommendations and advice to the Deputy Minister and the Executive Committee on HR matters; analyses and selects alternatives from innovative solutions and approved precedents in order to resolve major situations; reviews and monitors the overall impact of HR policies and programs to determine their success in recruiting, developing and retaining qualified staff for departmental programs; initiates special studies to determine the impact of proposed central agency and union initiatives; modernizes the HR management information systems; establishes standards of service; and ensures that service quality is maintained. The incumbent sits on and leads the Department's Executive Committee in the organizational diagnosis of needs in terms of HR competencies and relationships that will support the attainment of strategic and program objectives.

The DGHR represents the Department's interests in key corporate decision-making bodies on issues of HR renewal and training, as well as the design of government-wide HR programs. The incumbent also establishes working relationships with central agencies and peers in the HR community to secure essential authorities for the Department within the broader HR renewal agenda.

Step 6: Targeting the Dimensions of the Position

This step consists of identifying the budget figures and FTE numbers on which the decisions and recommendations of the position have direct (primary), shared, contributory or indirect impact.

They should include, for example:

- ▶ The number of employees supervised (both directly and/or functionally);
- ▶ The annual payroll of those supervised;
- ▶ The annual operating expenses of the unit;
- ▶ The cost of materials purchased or used (annually);
- ▶ Various assets controlled or affected; and
- ▶ Any other significant dollar or other values that are measurable on an annual basis.

Example identifying financial and human resources dimensions	FTEs	Operating Budget
Director General, Human Resources		
Sector:	128	\$1.96 million
Department:	4,442	\$34.7 million

Step 7: Listing the Specific Accountabilities

This step consists of listing the major responsibilities of the position, including the expected results. Contrary to the general accountability section, this section describes the principle accountabilities to be accomplished by the position.

- ▶ The specific accountability statements are not activities and duties but rather a series of broad statements on *what the position is expected to accomplish*.
- ▶ They should prioritize and always be listed *in the order of their importance* so as to provide a relative degree of emphasis for each.
- ▶ They should also start with an action verb, state an end result and define the ways in which the end result is to be achieved or the means to be used.
- ▶ Four to seven statements are usually sufficient.

Note: It is important that references to each specific accountability statement are reflected in the section on the position's nature and scope.

Examples of the specific accountabilities of the position

Director General, Human Resources

1. Directs the Department's HR function, leading the delivery of HR services domestically and abroad; ensuring that the Department has the maximum delegated authorities and accountability agreements providing for the effective management of all HR disciplines, policies and programs; and ensuring the development and implementation of effective quality control, functional review and monitoring activities in order to meet statutory, regulatory and central agency requirements.
2. Leads the Executive Committee through organization assessments to determine the HR implications of departmental strategic, policy and program objectives and to determine how HR strategies, programs and processes can best support the achievement of the Department's mandate.
3. Provides leadership in the Department's HR renewal strategy with particular emphasis on achieving management accountability, strengthened organizational capability and an enabling culture.
4. Leads the development of a departmental learning culture and a learning framework based on the continuous expansion and development of individual and group competencies.
5. Represents the Department's interests and priorities in the development of public service-wide policies and initiatives, and negotiates for the resolution of problems and major concerns with central agencies, other departments and bargaining agents.
6. Provides strategic advice to the Minister, the Deputy Minister and the Executive Committee members on all matters related to HR management for meeting departmental objectives, and develops short- and long-term HR strategies and plans.

Step 8: Signing Off on the Work Description

The last step is to include a signature block and date for the immediate supervisor of the position to approve the contents of the work description and for the incumbent to confirm reading the work description and that he or she has had the opportunity to comment on it.

Example of a signature block for signing off the work description

Employee's Statement / Déclaration de l'employé	
I have been given the opportunity to read and comment on the content of this work description. / J'ai eu l'occasion de lire et commenter le contenu de cette description de travail.	
Name of employee / Nom de l'employé	
_____	_____
Signature	Date
Supervisor's Statement / Déclaration du surveillant	
This work description accurately describes the work assigned to this position. / Cette description de travail décrit adéquatement le travail assigné à ce poste.	
Name of supervisor / Nom du surveillant	
_____	_____
Signature	Date

Appendix A: Information-Gathering Checklist

Major Responsibilities

1. What is the overall purpose of the position?
2. What are the major responsibilities the position is intended to fulfill?
3. Which are the most time-consuming?

Program or Legislative Responsibilities

1. What is the position's role in administering the legislation or program?
2. What is the position's role in formulating or recommending policy?

Authority and Assistance

1. What assistance is available from other groups in the department or agency?
2. What are the most important decisions made by the position?
3. What questions are referred to the supervisory manager before taking action?
4. What are the most important recommendations made to the supervisory manager?
5. What other responsibilities does the position have that may not usually be associated with such a position?

Relations With Others

1. To which position does the subject position report?
2. Are there other positions to which this position is functionally responsible?
3. Are there other positions to which this position provides functional direction?
4. What aspects of the environment surrounding the position make it more difficult to accomplish its objectives?
5. What subordinates report to the position?
6. What are their primary responsibilities? (Be brief.)
7. What contacts does this position have in other departments or agencies?
8. What are the reasons for these contacts?
9. Which other positions report to the immediate supervisory manager?

Hardest Part of the Job

1. What are the major issues?
2. What is the greatest challenge?
3. What are the most complex problems?
4. Which aspects of the position require assistance from others?
5. Who provides this assistance?

Statistics on Job Dimensions

1. What are the approximate numerical values of the items that help explain the overall size of the position?
2. Which of these are the direct responsibility of the position?
3. Which of these is/are the position partially or jointly involved in? Identify the other positions involved.

Additional Information

1. What other information would be helpful in giving a complete picture of the position?

Appendix B: Pitfalls

Another check is to look for the most common job description errors as listed in the following.

General Pitfalls

1. The description is too long, with too many details, many of which are irrelevant.
2. The description is too short and superficial and, as a result, fails to capture the elements of the job.
3. There is an incorrect emphasis on minor aspects of the job. For example, the position is primarily financial, but human resource responsibilities have been placed first.
4. There are incomplete or missing facts such as information on the number of subordinates, branches, offices, locations, programs, services or equipment that is omitted.

General Accountability

1. A summary of duties is presented rather than a statement of the primary purpose of the position.
2. There is a lengthy, detailed list of activities consisting of 5 to 10 lines. The statement should not exceed 3 lines.

Organizational Structure

1. Organizational relationships (upwards or downwards) are confusing or incomplete. Sometimes they contradict the organizational chart or do not differentiate between line and functional relationships.
2. Significant lateral organizational relationships are left out.

Nature and Scope

1. There is an inadequate description of the nature and complexity of the service or function.
2. No examples are used to add meaning or, if they are given, they are poor.
3. Personal judgments or conclusions are presented.
4. Information normally found in Statement of Merit Criteria should not be included in the work description.
5. There are too many vague generalities rather than precise, clear and concise statements.
6. The description of freedom to act and procedural controls are written for subordinate positions. These belong in the work descriptions for those positions.
7. Committee memberships are included with no description of the role of the committee or of the reason the incumbent should serve on it.

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8. No recognition is given to the role the position plays in the overall administrative and managerial processes. (It is not necessary to quote at length all the standard practices involved. A sentence or two will provide what is needed.).
 9. No mention is made of the greatest challenge(s) or major problem(s) faced by the position.
 10. No mention is made of where the incumbent can obtain assistance in solving problems, either inside or outside the organization.
 11. The description of the organizational unit is too long and repetitive and does not provide useful information. Information about the organization that is relevant only for the ADM position is repeated in the subordinate work descriptions.

Dimensions

1. There is an effort to be too precise. In most cases, approximate figures or data are enough.
2. Too many dimensions are given. Three or four are usually enough.
3. The dimensions are not related to the actual accountabilities or the nature and scope of the position as it has been described.

Specific Accountabilities

1. Activities or duties are listed rather than *major end results*.
2. The relationship between the end result and how it is achieved is tenuously described.
3. One specific accountability statement covers several end results to the extent that it encompasses most of what is expected of the position.
4. The end result or the means are worded too generally to be meaningful.