

A Method of Evaluating Clerical Jobs and Employees¹

Designed to Serve as a Basis for More Scientific Control of Office Problems and More Intelligent Placement of Office Workers

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THE NUMBER of clerical workers in the industries of this country has increased seven-teen fold in the last fifty years, while the population has little more than doubled.² With this tremendous increase have come economic wastes and human injustices that are at last calling the attention of major executives to office problems. The principles of scientific management that were first applied in the plant only are now being utilized in office management as well.

A method of analyzing, rating and classifying clerical jobs and employees that has been found to be effective and easy to carry out is briefly described here and the forms used for securing and utilizing the necessary information are reproduced.

The form represented in Figure 1 is used to secure the necessary information for analyzing jobs. This can be submitted directly to the clerks for filling out and later checked by the job analyst with the department head or chief clerk to be sure that replies are complete and authentic. Care should be taken that a job is not over or under estimated.

The form shown in Figure 2 has been used to prepare the analysis from which the job rating and classification are determined. Variations in the form may of course be advisable to fit special cases. It provides for entering the job title; the department and section in which the job is done; the person to whom the employee reports—of value in determining the relative importance of the job; the points of contact, and the actual duties of the job. Transitive verbs should be used in enumerating the duties of the job in order to insure a description of the action performed. The form also provides for listing the minimum qualifications that a person must have in order to be placed on the job at all. These should be drawn up by the job

analyst from the rest of the material on the form, but no attempt should be made to establish standard requirements for the job at this time. This is done more accurately from the job ratings than from the information so far available.

After the analyses are completed the form illustrated by Figure 3 is used for rating each job and setting up standard requirements for it. Certain factors enter into every job, such as skill, intelligence, etc., and certain elements enter into each one of these factors, such as, manual, numerical and verbal skill. By using standard definitions of these factors and elements, together with the job analysis sheets, it is possible to check on this form the relative importance of each factor and each element in any job. Care should be taken to set up standard requirements without any consideration of the person or persons already performing the work. The rating of persons comes after the jobs have been rated, classified and bases of pay established.

After the job ratings have been completed by the job analyst they should be submitted to the department head for his comments. The ratings and comments of the department head should then be brought before a committee of executives thoroughly familiar with the office operations. This committee should finally determine the "standard" requirements for each job.

These then serve as a basis for placing each job in one of four classes.

Class I includes minor executive jobs, specialist jobs, jobs requiring technical knowledge, initiative, trade knowledge, imagination—all jobs that have a high market value.

Class II includes semiroutine jobs requiring some initiative, special training, experience over a long period, or a high degree of skill. These are jobs of a more or less confidential nature that are not easily filled from the rank and file of applicants or members of the organization.

¹Developed by the author from methods used at the Dennison Manufacturing Company, Framingham, Mass.

²Lefingwell, W. H., "The Present State of the Art of Office Management," *Bulletin of the Taylor Society*, Vol. X, No. 2, April, 1925.

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171

December 2nd, 1926.

Title: Section Chief.

Department: Credit and Adjustment

Section: Credit and Collection.

Reports to: Department Head.

Points of Contact:

Employees of the Section.
Department Heads, Section Chiefs and employees of other departments.
Office Manager, Merchandise Committee Chairman and General Sales Managers occasionally.
Customers and District Managers through correspondence and occasionally through personal contact.

Description of Duties:

Supervise work and personnel of the Section, instruct new clerks in their duties.
Give advice as to the work and explain and interpret company policies to the clerks.
Dictate letters in connection with the collection of all accounts where the situation is too difficult for the correspondents and in connection with granting credit to large accounts of a questionable nature.
Approve all "Service Letters" explanations originating in the Section before they are submitted to the Office Manager.
Review letters of the newer correspondents to make sure that they are correct and in accord with Company policies.
Develop improved methods of procedure, performance or control for the Section.
Pass upon very questionable accounts where credit is desired.

Minimum Entrance Requirements:

Sex - Male
Age - 24 years
Education - College or equivalent; preferably some business education and instruction in business writing.
Experience - A year with the Company and preferably more.
Training - In Office Procedure, supervision of personnel, business writing, employment, sales and credit and collection policies of the Company.
Miscellaneous - ability to observe and enforce company rules and regulations. Application, reliability and company interest to a marked degree.

Figure 2

Class III includes strictly routine jobs requiring but limited education and a short training to produce proficient work. These are jobs easily filled from the ranks or from the ordinary run of applicants.

Class IV includes measured production jobs, or those to which differential piece or hourly rates of payment may be applied successfully.

The rating of jobs and employees is done by giving a point value to various degrees of each factor and element in the job. The rating sheet provides for a possible score of seventy-six points. To place each job in its proper class this total number of points is divided into three parts. Jobs rating from one to twenty-four points are placed in Class III; those rating from twenty-five to thirty-nine points are placed in Class II; and those rating over forty points are placed in Class I. Since Class IV jobs all involve ability to use a special type of apparatus and are capable of objective measurement, they are considered as exceptions. The ratings of these jobs can be used, together with time study, to set differential piece or hourly rates of payment for the various jobs.

Clerical Employees:

The following questionnaire is given you in order to record certain concrete facts about your job, which it is hoped can be made useful in handling some of the problems which concern us daily.

The results toward which this questionnaire may be expected to contribute are as follows:

1. The establishment of promotional lines.
2. The equitable adjustment of pay commensurate with the job and ability of the worker.
3. The determination of the necessity for training, and the kind of training most needed.
4. The facilitation of interviews in hiring.
5. The definition of limits of work and duties by means of a standard record, so that the new worker may know exactly the conditions under which he is hired and under which the work is performed.

This questionnaire is purposely a short one. It leaves much for you to tell about your job. You may be inclined to feel that some of the minor details of your job do not count. They will count in a large majority of cases, so be sure to include all of them.

The questionnaire should be read very carefully before answering. Considerable thought should be given your answers before writing them. Time should be taken to write the answers concisely and correctly.

After you have completed your answers, pass the questionnaire to your Section Chief. You have until December 15 to complete your answers.

Be sure to pass it in on time.

Office Manager.

JOB ANALYSIS QUESTIONNAIRE

Section _____ Job _____

Your Full Name _____ Sex _____

Education _____

(State highest grade reached and any special courses taken)

That special training in this company have you had _____

How long have you been employed on this job? _____

What other jobs have you had with this or any other company? _____

From what person or Section do you receive your work? _____

To what person or Section do you send it? _____

Does your work bring you into contact with persons outside your Section? _____

If you supervise the work of others, state how many and what their positions are? _____

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Describe here those duties which you perform regularly, but at stated periods only, as for instance, each week, each month, etc.

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Describe here the duties (within the limit of your own job) which you are called upon to perform from time to time, but which are strictly special and irregular.

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Figure 1