



Class Evaluation System Manual

Master Copy and Guide Charts

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Table of Contents

1	BACKGROUND	1
2	SYSTEM PHILOSOPHY AND CONCEPT	2
3	APPLYING THE SYSTEM.....	3
4	CHARACTERISTICS OF WORK BY SKILL LEVEL	4
5	JOB FACTORS	6
	Training and Ability.....	7
	Experience	8
	Level of Work.....	9
	Human Relation Skills	10
	Physical Demands	11
	Working Conditions and Hazards	12
	Independence of Actions	13
	Impact of End Results	14
	Supervision Exercised.....	15

APPENDIX I EVALUATION SHEET

APPENDIX II COMPARISON CHART

Springsted provides high quality, independent financial and management advisory services to public and non-profit organizations, and works with them in the long-term process of building their communities on a fiscally sound and well-managed basis.

1. Background

Public employers recognize that employees are an organization's most valuable asset and that organizations accomplish their mission largely through the efforts of employees. Employee-related costs represent a significant investment, considering that nearly 75 percent of an organization's budget goes towards compensation and benefits. In light of this organizational investment, treating employees fairly and equitably is important to the well-being of every organization.

Classification and compensation plans provide organizations with a systematic approach for determining employee compensation. A classification plan defines the internal relationship among positions. This relationship is developed based on an evaluation of each position within an organization. For each position within an organization a job description is developed which includes the essential duties of a position or class of positions, the required education, experience, training, licensure and certification requirements and the level of knowledge, skills and abilities required to perform the essential duties of a position. Positions are then evaluated based on this information to determine the relationships of positions within an organization. A compensation plan establishes the amount that the organization is willing to pay for a position; it is developed based on market wage and benefit information, job evaluation and the organization's pay philosophy.

The Systematic Analysis and Factor Evaluation® (SAFE) System developed by Springsted Incorporated gives organizations a proven approach to establishing job points based on an assessment of how the position rates among a series of job factors. The assessment is made based on a review of information about each position. This assessment generally includes the job or class description and a Position Analysis Questionnaire completed by the employee and the employee's supervisor. Ongoing use of the SAFE system assists organizations in maintaining their classification and compensation plans by ensuring a consistent and equitable method of evaluating jobs and relating jobs to compensation.

The SAFE system generates numerical values for each position based on defined values associated with six (6) skill levels comprised of sixteen (16) work characteristics and nine (9) job factors. Evaluators are trained in how to apply SAFE skill levels and job factors to ensure objectivity in the use of the system.

2. System Philosophy and Concept

A job evaluation system is a systematic method of assessing the responsibilities and requirements of positions or classes of positions and the application of value judgments in a standardized and structured way to ensure the consistency and equity of the results. In the SAFE job evaluation system, trained evaluators make value judgments by determining the general work characteristic of a position or class of positions and then applying the work characteristic to a series of job factors to develop a numerical value for each position. The point total represents the value assigned to a position based on the requirements of the position.

3. Applying the System

The first step in applying the SAFE job evaluation system is to develop job or class descriptions for all positions within an organization. Positions may be grouped together into job classes on the basis of their similarity of essential duties, responsibilities and job requirements. For example, an organization may have several job descriptions for administrative assistants that vary in specific tasks but have a similar general definition of work. In this example, the organization has an administrative assistant job class in which specific tasks assigned to each position may vary while the general work characteristics are the same. For many organizations, a job position is the same as a job class.

The job or class descriptions developed should include a general definition of the work performed, the essential duties of a position, education, training, licenses, or certifications required of the position, the required knowledge, skills, and abilities, supervisory relationships, along with the physical requirements and working conditions of a position.

After the job or class specifications are completed, the process of job evaluation begins. Job information is evaluated to determine the degree to which each job factor is present in the position being evaluated. Evaluators must have a thorough understanding of the standard definitions associated with each SAFE job factor and receive training to establish shared judgments and uniform guidelines for interpreting the SAFE system. Training promotes the consistent application of SAFE definitions, which is essential to ensuring the system's integrity.

To begin the evaluation process the evaluator must first determine the general work characteristic of the position and then determine the skill level of that work characteristic. The position is then evaluated utilizing the nine job factors. The positions point total is then calculated and the total point value is utilized to assign the position to the appropriate salary grade in the organizations compensation plan.

When evaluating or re-evaluating a position or class of positions it is important to consider how the position relates to other positions within the organization including those that the position reports to or supervises. It is always helpful to make cross-comparisons of positions of the values assigned for each job factor. This assists the evaluator in ensuring a consistent application of the SAFE job evaluation system.

4. Characteristics of Work by Skill Level

Characteristics of work can be defined as that general character of the scope of the work performed by a position or class of positions that serves to distinguish it from other positions and serves to designate the position in an organizations classification system.

Listed and defined below are sixteen work characteristics grouped by skill level that, when used in conjunction with the nine job factors, determines the value of the position or class of positions as it relates to all other positions within the organization. As the first step of job evaluation the work characteristic and skill level for the position must be determined.

Skill Level I	Manual – work requiring the use of basic physical skills in performing uncomplicated tasks.
Skill Level II	<p>Administrative Support – work requiring the use of basic language, mathematical and social skills in the orderly reproduction, processing, recording and maintenance of informational and financial documents requiring word processing, data entry and/or typing skills.</p> <p>Human Support – work requiring the use of basic social and physical skills in aiding in the care, comfort, and well-being of human beings.</p> <p>Semiskilled – work requiring the use of specialized physical skills, tools and light equipment in performing routine to complicated tasks.</p>
Skill Level III	<p>Skilled Administrative Support – work requiring the use of highly developed language, mathematical, social and specialized skills in the orderly production, processing, recording and maintenance of informational and financial documents and requiring word-processing, data entry and spreadsheet skills.</p> <p>Skilled Human Support – work requiring the use of specialized social and physical skills in aiding in the care, comfort, and well being of human beings.</p> <p>Skilled Trades – work requiring the use of specialized physical skills and heavy and specialized equipment in performing complicated tasks.</p> <p>Technical – work requiring the use and application of basic technical procedures and techniques in performing and responding to routine tasks, situations or problems. Work may also require specialized physical skills.</p>
Skill Level IV	Administrative – work requiring the application of specialized procedural knowledge and communication skills in the planning, organizing, coordinating, supervising, managing, and or directing programs, department or division activities, procedures and practices.

Advanced Human Support – work requiring the use of highly developed and specialized social and physical skills in aiding in the care, comfort and well-being of human beings.

Protective Services – work requiring the use of basic and specialized social and physical skills and the application of specialized knowledge in the protection of life and property from criminal, negligent or natural acts in accordance with federal, state and local laws, regulations and procedures.

Skilled Technical – work requiring the use and skilled application of detailed technical procedures and techniques to recurring situations or problems. Work may also require specialized physical skills.

Skill Level V

Advanced Protective Services – work requiring the use of highly developed and specialized social and physical skills and the application of specialized knowledge in the protection of life and property from criminal, negligent or natural acts in accordance with federal, state and local laws, regulations and procedures.

Advanced Technical – work requiring the use and application of highly developed and detailed technical procedures and techniques to a variety of situations or problems. Work may also require specialized physical skills.

Professional – work in providing highly developed planning or implementation of professional activities requiring the application of advanced knowledge and communication skills, research, data analysis, client assistance and/or other activities.

Skill Level VI

Executive – work requiring the application of advanced knowledge, communication skills, personal integrity, creativity, judgment, evaluation or related input to the solution of complex problems or situations.

6. Job Factors

Listed and defined below are the nine job factors that, when used in conjunction with the skill level of the work characteristic, determine the value of the positions as it relates to all of the positions in the organization. The sum of the numerical values for each factor determines the total point value for each position.

	Factors	Point Brackets
I.	Training and Ability	10 - 160
II.	Experience	0 - 125
III.	Level of Work	10 - 140
IV.	Human Relations Skills	0 - 80
V.	Physical Demands	0 - 50
VI.	Working conditions and Hazards	0 - 70
VII.	Independence of Action	0 - 120
VIII.	Impact on End Results	0 - 140
IX.	Supervision Exercised	0 - 140

It should be noted that some factors have degrees at “0” point value, indicating that the factor may not be present at all in some positions. Other factors are presumed to be present at least to some extent, in all positions.

Training and Ability This factor evaluates the job requirements in terms of training and ability which an employee should have acquired to do the job satisfactorily, whether acquired in school or by independent study.

Point Value

- 10 **Less than High School Diploma/GED**
Can read sentences with common vocabulary; can copy information from one record to another accurately; can add, subtract, multiply and divide whole numbers. (Equivalent - less than high school graduation.)
- 20 **High School/GED**
Can read and prepare a variety of written or non-technical reports; communicates effectively with others; can make a variety of mathematical calculations, such as fractions, decimals and percentages, or can operate machines, tools or equipment requiring extended instruction and some formal on-the-job training; comprehends moderately complex technical instructions and graphic material. (Equivalent to high school/vocational school graduation.)
- 40 **Associates/Technical**
Fundamental study of a specialized field such as sociology, accounting, sub-professional engineering, recreation, business studies; or high school diploma or GED and completion of specialized training, and/or attainment of required licenses and certifications; able to research and compose related original material; able to apply basic theoretical principles in the solution of practical problems; or the knowledge and ability to operate highly specialized machinery, tools or equipment requiring extended theoretical study and training. (Equivalent to completion of technical school/junior college graduate.)
- 80 **Bachelor's**
Thorough study of a social, technical or artistic field of study (i.e., business, social work, art, engineering, nursing, social work, journalism, accounting, etc.); or Vocational/Associates Degree, and completion of specialized training, and/or attainment of required licenses and certifications; must be able to define problems, collect data, establish and interpret facts and draw valid conclusions; manipulates data with complex mathematical or other systems related to the field of work. (Equivalent - Bachelor's degree.)
- 1.5 times
Bachelor's **Master's**
Advanced study of the principles, philosophies, methods, procedures, management and administration of a complex field of study. Able to develop theories and approaches to solve highly complex or technical problems. (Equivalent - graduate degree.)
- 2.0 times
Bachelor's **PhD**
Comprehensive study of a specialized and complex field of study requiring extensive independent research and creative work; ability to write and edit complex theoretical and informational material; ability to define and resolve complex and intricate problems and to develop corresponding theory. (Equivalent - postgraduate degree.)

Experience

This factor evaluates the time usually required for a person with the requisite educational background to develop the necessary skills and abilities to do a specific job under normal supervision. Only that experience acquired through related work qualifies for consideration.

Minimal Experience

Experience sufficient to enable an employee to acquire some familiarity with the methods and procedures found in common work situations of the occupational field. Usually less than one year of related experience.

Moderate Experience

Experience sufficient to enable an employee to acquire moderate familiarity with the methods and procedures found in common work situations of the occupational field. Usually one to three years of related experience.

Considerable Experience

Experience sufficient in an occupational field to enable an employee to perform work as assigned with little direct supervision; work calls for a proficient comprehension of standard work situations. Usually three to five years of related experience.

Extensive Experience

Broad experience in both commonplace and unusual work situations and problems of the occupational field; sufficient to enable an employee to plan and administer major work programs. Usually six years or more of related experience.

Experience Level	Skill Level					
	I	II	III	IV	V	VI
None	0	0	0	0	0	0
Minimal	5	10	15	20	30	40
Moderate	10	20	30	40	50	60
Considerable	15	25	35	50	65	85
Extensive	-	35	45	65	95	125

Level of Work

This factor, when applied to the characteristic of work/skill level, determines a uniform foundation upon which the balance of the factor evaluation process builds. It also serves to refine and evaluate the position or rank of the specific position to all positions in the organization.

Basic

Typically entry level of the type of work performed requiring the incumbent to handle a restricted scope of fundamental assignments or problems.

Intermediate

Intermediate level of the type of work performed requiring the incumbent to handle a variety of assignments or problems independently.

Difficult

Advanced and often supervisor level of this type of work requiring the incumbent to handle all assignments or problems except those requiring unit or departmental policy or procedural change.

Complex

Highest level of mastery of this type of work and is an expert and often a managerial position. It requires the incumbent to handle or direct the handling of all assignments or problems including the establishment of policy and procedures, in the field of work.

Experience Level	Skill Level					
	I	II	III	IV	V	VI
Basic	10	15	20	35	45	60
Intermediate	15	20	30	45	60	80
Difficult	-	30	40	60	80	100
Complex	-	40	55	80	110	140

Human Relations Skills

This factor evaluates the responsibility for working with or through other people to achieve the desired results. The rating should be based on the extent, frequency and purpose of the contacts and the importance of the resulting actions.

Point Value

- | | |
|----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 0 | Limited
Little or no contact required except with immediate associates and direct supervisor. |
| 10 | General
Requires regular contact within the department and periodic contacts with other departments, outside agencies and the general public, supplying or seeking information on non-specialized matters. |
| 15 | Reactive
Requires regular contact within the department and periodic contacts with other departments, outside agencies and the general public, supplying or seeking information on specialized matters. |
| 30 | Proactive
Requires outside and inside contacts to carry out organization programs and to explain specialized matters or occasional contacts with officials at higher levels on matters requiring cooperation, explanation and persuasion or work requiring continuing personal contact with the public involving the enforcement of laws, ordinances, policies and procedures. |
| 50 | Influential
Requires regular contacts with persons of importance and influence involving considerable tact, discretion and persuasion in obtaining desired actions and/or the handling of difficult interpersonal relationships. |
| 80 | Managerial
Requires continuing contacts involving difficult negotiations calling for well-developed sense of timing and strategy and detailed explanation and interpretation of policies, rules and regulations and/or the handling of very difficult interpersonal relationships. |

Physical Demands This factor measures the job requirements which induce physical fatigue through exertion and strain.

Point Value

- | | |
|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 0 | Sedentary
Requires little or no physical effort or exertion. |
| 10 | Light
Requires light physical effort working almost exclusively with light weight materials (up to 25 pounds) or short periods in difficult work positions. |
| 20 | Medium
Requires moderate physical effort working regularly with light weight materials and occasionally with heavy weight materials (over 60 pounds) or occasional requirements for continuing periods in difficult work positions. |
| 40 | Heavy
Requires considerable physical effort working continuously with average and frequently with heavy weight or frequent requirements for long periods in difficult work positions. |
| 50 | Substantial
Requires heavy physical effort continually working with heavy weight materials for the entire work period. |

Working Conditions and Hazards

This factor measures the surroundings and environmental or physical conditions under which the job must be done and/or the hazards present on the job, even though all reasonable safety precautions have been taken, the frequency and duration of undesirable conditions or hazards encountered are also taken into consideration. The mental effort and/or stress of the position are included under this factor.

Point Value

- | | |
|----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 0 | <p>Excellent
Working conditions with absence of disagreeable conditions and little or no accident or health hazards (or) limited mental effort and/or stress.</p> |
| 5 | <p>Good
Working conditions, may be slightly dirty or involve occasional exposure to some disagreeable elements (dust, heat, fumes, cold, noise, vibration or wetness) and accidents are improbable other than minor injuries such as abrasions, cuts or bruises; health hazards negligible (or) some mental effort and stress involved resulting in inconvenience and frustration.</p> |
| 15 | <p>Somewhat Disagreeable
Working conditions due to exposure to one or more of the elements listed above; may be exposed to one element regularly or several elements occasionally, but usually not at the same time; work involves frequent exposure to hazards where lost-time accidents are definitely possible, such as injuries to a hand or foot, etc.; some exposure to health hazards, although probably not incapacitating (or) considerable mental effort and stress involved which could result in tension or anxiety.</p> |
| 25 | <p>Disagreeable
Working conditions where several of the above elements are occasionally present to the extent of being objectionable or regular exposure to work situations which could result in incapacitating accidents or health hazards that could result in serious injury or, on occasion, loss of life (or) serious mental stress involved which could, over a period of time, result in a temporary mental disorder, severe mental anguish, and/or physical illness.</p> |
| 45 | <p>Hazardous
Working conditions where one or more of the above elements are regularly present and objectionable, or continuing exposure to work situations which could result in incapacitating accidents or periodic exposure of work situations involving hazards that could result in total disability, critical illness or loss of life, despite the provision and/or implementation of available safety measures (or) severe mental stress involved that could result in a serious mental disorder, psychosis, mental instability and/or impair physical health.</p> |
| 70 | <p>Very Hazardous
Constant exposure to work situations involving hazards which could result in total disability, critical illness or loss of life despite the provision and/or implementation of available safety measures.</p> |

Independence of Actions

This factor evaluates the extent to which the job requires or allows the employee to work independently.

Prescribed

Work subject to direct and detailed instruction with close supervision.

Standardized

Work subject to general instructions, established routines and/or standardized practices and procedures with supervision of progress and results.

Directed

Work subject to general policy direction, practices and procedures covered by precedents and general supervisory review.

Broad

Work, by nature and scope, is subject to functional policies and goals under general managerial direction.

Strategic

Work, by reason and scope, complexity and effect on overall organizational results, is subject only to broad policy and general management guidance.

Experience Level	Skill Level					
	I	II	III	IV	V	VI
Prescribed	0	0	10	20	30	40
Standardized	5	10	20	30	40	50
Directed	15	20	30	40	60	80
Broad	-	-	40	60	80	100
Strategic	-	-	-	80	100	120

Impact of End Results

This factor evaluates the extent to which the job directly influences and affects actions impacting the end results.

Incidental

Supportive, informational, recording or other service to assist others to meaningful and correct end results. (Minor consequences)

Advisory

Work efforts and actions assisting and supporting others or individually providing data or facilitating services for use by others. (Moderate consequences)

Operational

Daily actions or services affect individual clients/citizens; activity has meaningful impact on specific cases within service area. (Moderate consequences)

Contributory

Participating with others (within and/or outside organizational unit) in program development, service delivery and supervision of subordinate staff. (Serious consequences)

Primary

Major individual impact on and accountability for end results affecting organizational unit or total organization. (Serious consequences)

Skill Level

Experience Level	I	II	III	IV	V	VI
Incidental	0	5	15	20	30	40
Advisory	0	15	20	30	40	50
Operational	5	20	30	40	60	80
Contributory	-	-	40	60	80	100
Primary	-	-	-	80	120	140

Supervision Exercised This factor evaluates the employee's responsibility for exercising supervision over other employees. The determination of the point rating for supervisory responsibility is based on the organizational level, the size and the work characteristics of the group over which the supervision is exercised, and the level of supervisory responsibility of the position.

Number of Staff	Point Value
0	0
1-5	5
6-10	15
11 - 19	30
20 - 49	40
50 - 99	50
100 - 199	60
200 - or more	70

Occasional or Limited Supervision

Above value x 0.5

Continuous and/or Full Supervision

Above value

Division Head or Assistant Department Head

Above value x 1.5

Department Head

Above value x 2.0

Supervision of Volunteers

Utilize occasional or limited supervision value multiplied by percentage of time involved in supervision of volunteers.

APPENDIX I

Evaluation Sheet

Position or Class Title: _____

Skill Level: _____

Factor	Value
I. Training and Ability	
II. Experience	
III. Level of Work	
IV. Human Relations Skills	
V. Physical Demands	
VI. Working Conditions and Hazards	
VII. Independence of Action	
VIII. Impact on End Results	
IX. Supervision Exercised	
Point Total	

APPENDIX II

Comparison Chart

