

Broadband Classification Manual

Procedures and Standards

STATE OF MONTANA

Department of Administration

State Human Resources Division

January 14, 2015

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The Broadband Classification System

I. Preface

The Department of Administration (department) is responsible for developing a statewide classification and pay system that complies with 2-18-201 through 209, MCA.

- 2-18-201, MCA says, "The department shall implement and maintain a broadband classification plan for all state positions in state service except those exempt in 2-18-103 and 2-18-104."
- 2-18-202, MCA goes on to say, "(1) **Identification of occupations** - In providing for the broadband classification plan, the department shall group all positions in state service into defined occupations based on similarity of work performed, responsibilities assumed, difficulty of work, required knowledge, and required skills."

For systems with market-based components, such as broadband, classification considers those elements that have the largest impact on availability and cost of competent employees. By evaluating occupational requirements and the complexity level of decisions required to perform the work, we find the most predictive indicators of worker availability in the labor force.

Classification in the Broadband system is a human resources process for establishing a hierarchy of work. In the broadband system, occupation and level of work are measured by comparing the work to defined standards, called benchmarks. This comparative method is called the benchmark factoring methodology (BFM). BFM focuses on characteristics of the work, not the person doing the job. This means the job is classified based on the minimum requirements of the job as of the first day of work, and not the qualifications of an experienced or highly skilled individual who may currently perform the work.

This method also ensures positions are classified according to 2-18-208, MCA, which requires the department work toward the goal of establishing a standard of equal pay for comparable worth. The statute says, "This standard for the classification plan shall be reached by (1) eliminating, in the classification of positions, the use of judgments and factors that contain inherent biases based on sex", and (2) comparing, in the classification of positions, the factors for determining job worth across occupational groups whenever those groups are dominated by males or females.

II. The Benchmark Factoring Method and Classification Procedures

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The Benchmark Factoring Method

The Benchmark Factoring Method (BFM) is a classification process that compares work to "benchmark" standards. The State Human Resources division in the Department of Administration(State HR) is responsible for all standards. The standards, as defined by the broadband classification policy, are:

- factor-level definitions, found later in this manual,
- published benchmark job descriptions, found on the MINE site,
- occupation descriptions, found in O*Net and Montana Specific descriptors

All eligible positions are classified by classifiers, who must be certified by State HR. A certified classifier evaluates the work of a position to determine the following two components of a classification:

- one of nine factor levels, based on evaluation of the complexity of decisions made in the job, and
- an occupation, based on the knowledge, skills, and abilities required for the essential functions of the work



To classify a job, a certified classifier needs the following:

- ◆ **Job Code List** – usually contained in the market rates spreadsheet, this list provides available job codes for broadband classification.
- ◆ **Broadband Methods and Procedures Manual** - This manual sets the classification procedures and provides the factor level standards for the BFM.
- ◆ **Occupational Standards** – The state has modeled its occupational classification methodology on the Standard Occupational Classification (SOC) system from the Bureau of Labor Statistics, Department of Labor and Industry. Most occupational standards are found in the O*Net database.

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- ◆ **Benchmark Job Descriptions** – Descriptions of state government work that illustrate the accurate application of factor level language. To establish this standard, various agencies submit job descriptions, as well as additional information, and then work with State HR to classify the benchmark positions. All classifiers shall agree on a benchmark before it becomes a standard. The benchmark provides duties assigned to a representative position at a set point in time, and then describes how the factor level language applies to that particular type of work.

Application Principles

The BFM evaluates the work performed in any given position without considering the characteristics of the employee in the position or the classification of other non-benchmark jobs. Classifiers evaluate the complexity of the work by applying factor level definitions and the benchmarks.

Before beginning the evaluation process, classifiers must identify the predominant work assigned to the position by applying the following four principles of the **Predominant Duty Rule**.

- ◆ The classifier shall identify the work performed 50 percent of the time or more. Some jobs do not have a single duty that takes up 50 percent or more of the total work time. In those cases the classifier shall identify the most difficult duties and group them into a body of work that would be performed at least 50 percent of the time.

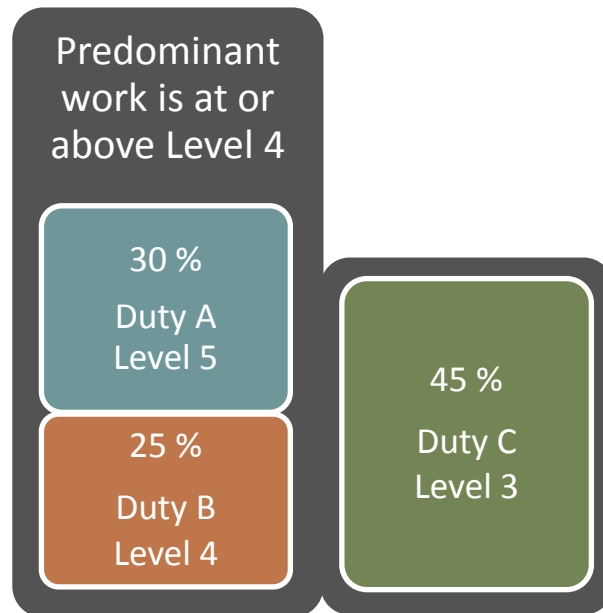
Mixed positions perform unrelated duties from two or more different **occupations**. If the unrelated duties differ significantly in factor levels, the resulting class allocation, based on the predominant duties, might not appropriately recognize the varying levels of work. If this situation occurs, agencies may consider splitting the position to create separate part-time positions so that each occupation can be classified independently.

- ◆ The predominant duties must be **fully equivalent** to the overall intent of the factor-level description to receive the rating. To assess the proper level, the classifier shall start at Level 1 and progress to the first level that most fully describes the total predominant work.
- ◆ Sometimes the parts of two factor levels describe predominant work; or, different parts of the predominant work meet the full intent of different levels. In these cases, the classifier shall apply the first level that accurately describes the predominant work. This means that the classifier shall select the lowest level that describes at least part of the predominant work, regardless of the percentage of the predominant work. For example:

Duty A	level 5	30%
Duty B	level 4	25%
Duty C	level 3	45%

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Level 4 is appropriate because 55 percent of the work is at or above level 4 (level 5, 30 percent plus level 4, 25 percent). This is also called "the lowest level of the most complex work".



- ◆ Comparison to a benchmark job description is essential. In the case of occupations that lack published benchmark descriptions, the classifier may use benchmarks from a related occupation, or benchmarks that demonstrate similar duties or level of work. If the related occupation or benchmark does not have an important characteristic of the job being classified, the classifier may use any benchmark that illustrates that part of the job. Classifiers may also compare to multiple benchmarks in different occupations to fully describe the application of a given factor level to various types of work. Lack of benchmarks for an occupation does not eliminate this step in the procedure, as the intent of the factor level language is illustrated by the benchmarks.

Application of the standards requires more than just matching specific words and phrases to the job description. It requires consideration of the **full intent** of each factor level and selection of the level that best reflects the nature of the work. The intent of factor level language is the controlling element in factor level selection and this intent is demonstrated in the benchmark job descriptions. Mandatory comparison to a benchmark job description then verifies factor level choice.

Examples of how to perform benchmark comparisons may include the following:

- There are no program specialist benchmark job descriptions. A classifier may assign a position to this occupation, but then must compare the duties to other benchmark occupations, such as the Administrative Specialist description, to describe why the work is a similar factor level.
- A new non-benchmark civil engineering job has different predominant duties than an existing civil engineering benchmark job description. To justify the proper factor level of complexity for the new civil engineer job, a classifier may need to use both an environmental science specialist benchmark

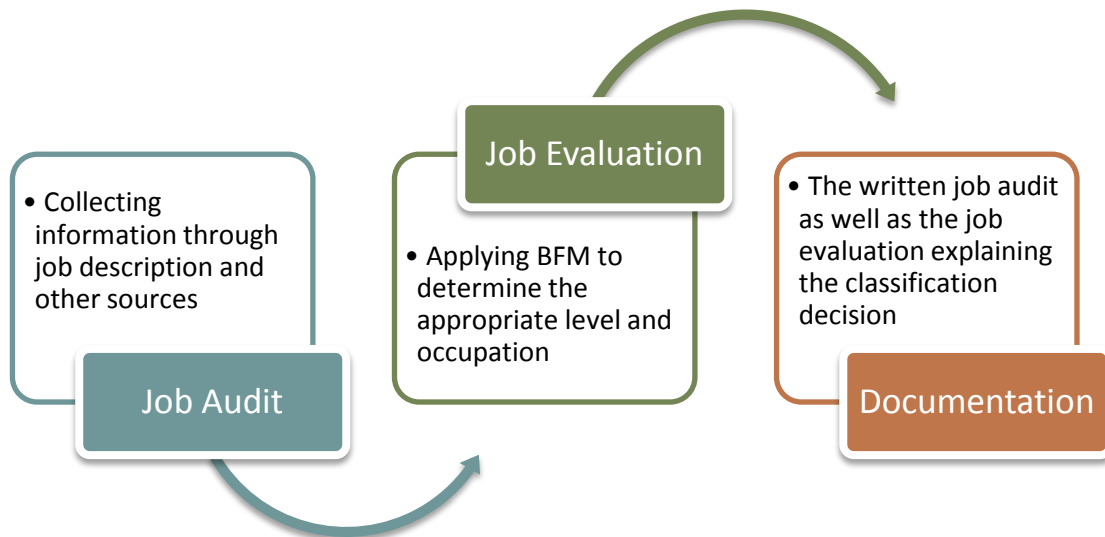
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and the civil engineer benchmark, to fully demonstrate how all aspects of the new job's predominant duties are similar in complexity to the standards.

State government jobs are so diverse that neither the factor level descriptions nor the benchmark job descriptions will capture all the possible variations. Therefore, classifiers shall exercise their professional judgment when applying BFM to positions. Benchmark job descriptions are not used to justify a position's occupation.

Application Procedures

This type of work must be performed by a certified classifier, as found on page seven. Before classifying a job, a classifier shall review the job description to ensure it has been updated by management, and shall gather an organizational chart. If, during the classification process, a classifier discovers a job description is inaccurate, the classifier may continue the job audit, but may not move to the next step of the classification procedure until an updated job description is completed. State HR additionally recommends gathering



information about the classification request through an agency classification request (ACR) form.

Application of BFM, like any classification process, requires analysis. During the classification process, job analysis involves three basic steps: job audit, job evaluation, and documentation. **Job audit** means collecting information about the position through the job description and other sources, such as work examples, or conversations with the supervisor and incumbent. **Job evaluation** means applying BFM to determine the appropriate level and occupation for a job. **Documentation** is the written job audit, as well as the job evaluation explaining the classification decision. BFM procedures follow:

- **Job Audit** – Before evaluating a job, classifiers shall first gather information about the work of the position, while considering the minimum requirements of the job as of the first day of work. A job audit is essential to ensure the accurate classification of the job. A classifier shall not assume they know how a job is performed, or how decisions are made on the job. The only way to ensure the

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job description accurately reflects the work, or to discover the mental processes behind the decisions made on the job, is to ask. **Most classification errors occur when a classifier does not conduct a job audit.**

Classifiers auditing jobs use the appropriate combination of methods for gathering information according to the type of work performed in the job. For example, a classifier may perform a desk audit for some types of manual work or repetitive work, but this method may not be appropriate for other types of work, such as when gathering information about hazardous duties, or when auditing jobs that require creative outputs. Some methods used for gathering information in a job audit may include the following:

- Questionnaire or written job audit questions,
- work samples,
- procedure manuals used to direct the employee,
- desk audits (direct observation of the work of a person currently in the job),
- requirements set by statute, grant, contracts, or other legal regulation
- information about work performed by similarly situated individuals,
- time studies or daily logs,
- follow-up questions (if needed)

As managers are responsible for assigning the work to their employees, classifiers shall verify the information gathered from the job audit with the manager of the position, to confirm work expectations. When the manager's expectation for the job differs from the employee's understanding of the job duties, information from the manager takes precedence when determining complexity level.

- **Job Evaluation** – Certified classifiers use their professional knowledge of the BFM to classify a position. Certified classifiers shall consider all relevant information gathered during the job audit; as well as updated job descriptions and organizational charts, when classifying a position.

When evaluating a job, the classifier shall only consider work currently and regularly performed by the employee. Certified classifiers shall not consider possible future work, temporary duties, work that was performed in the past and is no longer being performed, other duties as assigned, or work performed "as needed", when evaluating and classifying a job. These types of duties may be considered for pay purposes, but are not classifiable.

- **Documentation** – Certified classifiers shall capture their job audit information and the job evaluation's justification through proper documentation. This documentation may be used to explain the rationale behind the classifier's decision. Documentation is essential during a classification appeal. Documentation will also be used during the classification system audit process. Documentation may be reviewed periodically for accuracy, and updated as needed.

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Classifiers may conduct a full job evaluation and classification only when a job has significantly changed, and the changes may affect the complexity level for the predominant duty. As minor tasks and procedures are not included in a job description, these types of changes do not result in a change to a job's classification.

Process changes, minor task changes, format changes, and changes that do not affect the complexity level of a job may be addressed through a **job review**, and may be documented as a memo or letter to the position's file, indicating that the change was reviewed and noted.

Non-benchmark positions must not be used to justify a job's factor level classification. All factor level classifications must be supported by comparison to the published benchmark descriptions, and determined by the factor level standards found in this manual.

Certified Classifiers in the Broadband System

All broadband positions covered by 2-18-201, MCA, shall be classified by certified classifiers. The list of approved, certified classifiers is maintained by State HR.

Certified classifier status is set by the Broadband Classification Policy. This policy states, "The department provides training for the methods used to classify positions. Individuals who meet all training requirements may achieve classifier status." Requirements for certified classifier status follow:

- Classifier candidates take two classes
- Classifier candidates must complete exercises under the mentorship of a designated, certified classifier, appointed or approved by State HR. Classifier candidates may substitute real classifications for some of the exercises during this step of the process.
- Classifier candidates must classify additional real jobs, completed during the six months to one year timeframe from the date the candidate enters the training program. All real classifications completed by a classifier candidate shall be reviewed and approved by their mentor, or by State HR. The approved classifications shall then be submitted to State HR. State HR may require the classifier candidate edit the job evaluation.
- Classifier candidates complete a final exam, demonstrating their knowledge of broadband classification methodology. This final exam is administered by State HR.

Classifier candidates may extend their training time period by up to six months, to a maximum of 18 months, by requesting an extension from State HR. If the classifier candidate does not complete all requirements within 18 months from their starting date, the classifier candidate will be required to take the Classification Basics class again, may be required to take the final exam again, and/or may additionally be required to complete more real classifications.

To maintain classifier status, the Broadband Classification Policy requires classifiers participate in the following:

- review new standards issued by the department;

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- participate in training updates; and
- remain in compliance with methods and procedures set by the department.

State HR may remove an individual from the list of certified classifiers at any time.

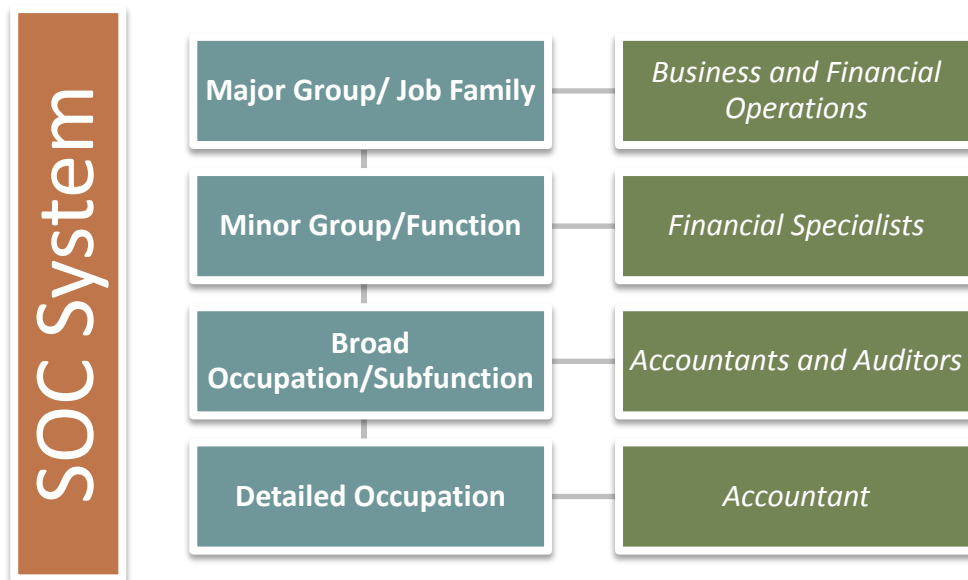
III. Occupational Classification and Job Code Development

Introduction

Job classification requires certified classifiers assign the work of a position to an occupation, as well as a band level. For example, civil engineer specialist describes a specific occupation, civil engineering. There are three levels (bands) of civil engineer specialist within this occupation.

Just as comparison to factor level language and benchmarks determines the level of work, comparison to occupational descriptions taken or adapted from the Occupational Information Network (O*NET) database determines the occupational title.

Standard Occupational Classification (SOC) and the O*Net database sort jobs into occupational families, based on an occupation's related types of knowledge, skills, and abilities. Each occupation contains a summary description and representative tasks. Occupational descriptions do not identify single positions except in very few cases. This section describes the method for determining the occupational title for a position and for requesting new job codes or titles from State HR.



Occupational Classification

Occupational classification means placing individual jobs into occupational categories based on similarities in their general characteristics. Like factor level evaluation, this process focuses on characteristics of the work, and does not consider the characteristics of the person in the job. When classifying a job into an occupation, we have aligned our broadband occupations to SOC system,

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developed by the U.S. Department of Labor. Examples of reasons to align our occupations to the federal database include:

- Measurement and comparison of occupations for workforce analysis;
- Internal and external comparisons needed for compensation decisions;
- Occupational descriptions to be used in career guidance, training, and succession planning;
- Reporting and analyzing data for EEO and other labor law requirements;
- Matching jobs and workers by job service;
- Improving recruitment and selection efforts;
- Building a common occupational language between information systems such as the American Community Survey of the U.S. Census Bureau, and other salary survey providers.

To select an appropriate occupational class, the essential functions must be compared to the O*Net occupational standards. A position cannot be allocated to an occupation that does not describe the essential functions. As occupational descriptions are very broad summaries, these descriptions rarely match the work of an individual position exactly. A 70-80% match to an occupational standard is considered a good match. However, regardless of the percentage match of each task or duty, classifiers shall choose the closest possible match from the list of available occupations, regardless of whether or not the job's tasks exactly match the standard. See the Choice of Occupation section for help in choosing an occupation.

What are SOC and O*Net?

The SOC is a national job classification system developed by the federal government that lists occupations in which work is performed for pay or profit, and excludes occupations that are unique to volunteers. In the SOC, occupations are classified on the basis of work performed, with consideration given to specific legal requirements, skills, education, training, or credentials. The SOC classifies jobs at four levels: major group (called a job family), minor group, broad occupation, and detailed occupation.

Occupations are clustered into one of 23 job families. An example is "business and financial operations." Job families may then be divided into minor groups, called job functions. An example is "financial specialists." Each of these job families in SOC is divided further into broad occupational groups. An example is "accountants and auditors." SOC further divides the broad occupational groups into detailed occupations, such as "accountants." SOC provides a summary description and representative tasks for each occupation. We use these descriptions, plus the more detailed information from O*Net and Occupational Outlook Handbook, to determine the most appropriate occupation for a given position.

O*Net is a comprehensive database of worker attributes and job characteristics developed by the federal government and designed to be both an occupational classification system and a comprehensive database of job descriptors and occupational characteristics such as required knowledge or skills organized by SOC occupational groups and families. The Occupational Outlook Handbook provides additional information such as education, licenses or certifications, work environment, and occupational outlooks for career planning.

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Occupational Employment Statistics (OES)

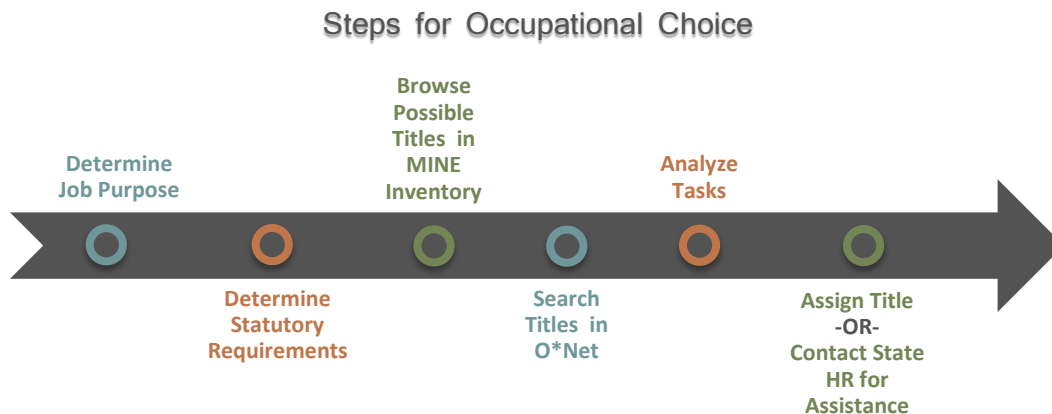
The U. S. Department of Labor’s Occupational Employment Statistics (OES) program produces employment and wage statistics for over 700 occupations, organized according to SOC occupational categories. Statistics from the OES include nationwide employment and pay data for occupations by state, metropolitan area, and industry. Pay information from the OES is a major component of the market analyses produced by State HR for state jobs in the Broadband Pay Plan. Montana state government also reports its employment data to the OES.

Montana Specific Descriptions

Some occupations are fairly obvious. They require specialized training and licensing, or are widely recognized. Other occupations, especially those specific to government, are less obvious. The information included in O*Net such as task lists, knowledge, skills and abilities, or work activities can assist in making distinctions between occupations. However, in some cases, no adequate description exists in O*Net. In those cases, State HR has developed "Montana Specific" descriptions in the same format as O*Net, which are available through MINE. These Montana Specific descriptions are considered standards, just as the descriptions in O*Net are standards.

Choice of Occupation

Use the following steps to identify an occupation for job classification.



- **Purpose of the Job** - Identify a job's occupation by examining the purpose of the job from the job description. The purpose of the job often contains clues that will help identify the right occupational title. Some choices will be obvious. For example, a purpose statement for a budget analyst may be described as "The purpose of the job is to analyze and project budget estimates for completeness and accuracy, in conformance with procedures and regulations". In this case, budget analyst may be the appropriate job title.
- **Statutory Requirements** - If you are unable to identify the job title from the purpose of the job, review the education, experience, knowledge, skills and abilities required to perform the job's essential functions. Some jobs have statutory requirements. Classifiers shall not use an

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occupational title for a job that has statutory requirements, unless the minimum qualifications of the job meet those statutory requirements.

Jobs with statutory requirements include the following examples: doctors, dentists, lawyers, paralegals, therapists, counselors, psychologists, social workers, engineers, appraisers, surveyors, veterinarians, nutritionists, nurses, plumbers, architects, and electricians. This list is not all-inclusive, and may be subject to legislative changes, so refer to Montana statutes and administrative rules when choosing occupations that have statutory requirements.

- **Browsing Titles from the MINE** - If the job has only general education or experience requirements, you may browse likely titles under their general occupational families available from the [MINE site](#), and are found by clicking on the current Market Analysis hyperlinks. You can find further information about a title by reviewing either the O*Net standard or the Montana Specific description associated with the job code title.
 - The most current occupational standard for most broadband jobs may be found in their O*Net description. These titles are available online at <http://online.onetcenter.org/find/>. Click the link or type the occupational title in the O*Net search box to review information about the occupation.
 - If the job code from the market analysis page is linked to an "all other" category, the title may have a Montana Specific description. These Montana Specific descriptions are not available from O*Net; they are only available on the [MINE](#). Montana Specific descriptions are standards, and are therefore considered in the same way as the occupational standards listed in O*Net.
- **Searching Titles from O*Net** - If a classifier cannot identify a possible job title by browsing the list of titles in the market analysis, the classifier may enter the working title or key words into the search box on the [O*Net page](#) to identify a possible job title. This will generate a list of potential occupational matches. See the image below for an example of O*Net search results.

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The screenshot shows the O*NET OnLine website interface. At the top, there is a search bar with the text "Occupation Quick" and a magnifying glass icon. Below the search bar, there are navigation links: "Help", "Find Occupations", "Advanced Search", "Crosswalks", and "Share". A yellow box highlights the search term "Quick Search for: continuity planning". Below this, a section titled "Occupations matching 'continuity planning'" provides instructions on how search results are ranked and how to use the relevance score. A table lists the results with columns for "Relevance Score", "Code", and "Occupation".

Relevance Score	Code	Occupation
100	13-1199.04	Business Continuity Planners ★ Bright Outlook
32	15-1121.00	Computer Systems Analysts ★
30	27-3041.00	Editors
29	43-9022.00	Word Processors and Typists
29	29-1065.00	Pediatricians, General
28	27-3043.05	Poets, Lyricists and Creative Writers
28	27-2099.00	Entertainers and Performers, Sports and Related Workers, All Other
28	27-3099.00	Media and Communication Workers, All Other

The relevance score in the first column will rank the most likely matches in descending order. When you click on an occupational title, each description includes a list of alternative titles. Your working title may be available in this list.

- Be aware that some Montana Specific descriptions will not be included in the list of potential matches.
- The search criteria does not return titles that match the “All Other” group in SOC or O*Net.
- Not all job titles in O*Net are available for broadband job codes.
- **Contacting State HR** - If there is no acceptable match in either O*Net/SOC, or in the Montana Specific descriptions, you may contact the State HR to discuss requesting a new job code or occupation, or to receive help identifying a job title.
- **Task Analysis** - Review the information in either the O*Net database or the Montana Specific description. This information is the occupational standard. Information in the standard includes a summary description, representative tasks, job zones, and other information you can use to match the job. If the job being classified matches the standard by at least 70%, it is considered a good match.
 - If the job does not match an occupational standard by at least 70%, the classifier shall perform a task analysis to determine the closest occupational match. This means comparing each of the job's duties to the tasks from each of the occupational standards to determine the closest match. The classifier may need to analyze multiple occupations before arriving at the closest match.

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- Apprentices and trainees are classified with the occupations for which they are being trained, while helpers and aides are classified in either a separate occupational title, or at a separate level.
- **Highest Skill Level** - When workers may be classified in more than one occupation, they are classified in the occupation that requires the highest level of skill. The skill level may be found by reviewing the O*Net job zone.
- **Agency Discretion** - If there is no measurable difference in skill requirements, the worker is included in the occupation in which he or she spends the most time or in the occupational area most likely to be recruited to fill the job, at the agency's discretion. The agency shall be consistent when applying this discretion, and shall document the method used by the agency.



Supervisory and Managerial Occupations

Supervisors and managers in the broadband system may be classified¹ in the same occupation and band level as the people they supervise. However, to qualify for a supervisory or managerial classification title and job code, supervisors or managers must supervise people, **and** they must perform either supervision or management duties at least 50% of the time. The following sections describe differences between executive, managerial and supervisory work.

Executive: As the top-level positions in the organization, these occupations include operations manager and financial manager from O*Net group 11. Examples include top-level division administrators and

¹ Note – Supervision for the purpose of administering pay is somewhat different from occupational classification for supervision.

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deputy directors. Private sector alternative titles for these occupations include chief executive officer (CEO), chief information officer (CIO) or chief financial officer (CFO). To qualify as a manager in group 11, the manager must manage people, and perform high-level management functions for at least 80% of their job. Typically, state government agencies do not assign positions lower than bureau chief to occupational categories in this group. Refer to the managerial decision tree (page 15) when classifying managers into group 11.

These positions are responsible for accomplishing the agency's mission. They are concerned with organizational performance and the “big picture”. Responsibilities may include establishing operating goals, directing the overall work of the organization toward these goals, and monitoring results to plan the nature, content and extent of operations, organizational structure, and budgets. Classifiers may refer to the managerial decision tree to help them decide if a job belongs in an executive manager occupation.

Managers (and Working Managers): These positions are responsible for a function, program or sub-program of the organization, are concerned with overall program performance, and for accomplishing long-term objectives. Responsibilities include planning, selecting, and devising methods or procedures to achieve the assigned goals. They supervise overall staff activities by monitoring output (both quantity and quality) to determine if changes in processes or priorities are needed and are responsible for operation, prioritizing and setting deadlines, and manipulating organizational structure to achieve organizational goals. Such positions often report to a higher-level executive manager and set performance standards, but do not necessarily monitor day-to-day performance of subordinates.

Managers must be allocated to the managerial class that is closest to the occupation of their highest level subordinates. Managers who perform high level management and manage people at least 80% of the time may be classified in group 11. Working managers who perform management between 50%-80% of the time may be classified in the appropriate supervisory/managerial occupation in the appropriate job family **other than** group 11. Examples include the following

- The chief of a human resources bureau who performs high-level management at least 80% of the time may be assigned to the human resources manager occupation in group 11.
- The chief of a diverse group of professionals, or a group of mixed technical and professional employees, that supervises or manages human resource specialists at least 50% of the time, may be classified as a business operations supervisor/manager in group 13, or as a human resource specialist.
- The chief of a smaller human resource unit, who supervises a few employees less than 50% of the time, and/or performs professional human resources duties as their predominant duty, may be classified as a human resource specialist in group 13.

Refer to the managerial decision tree on page 15 for more help.

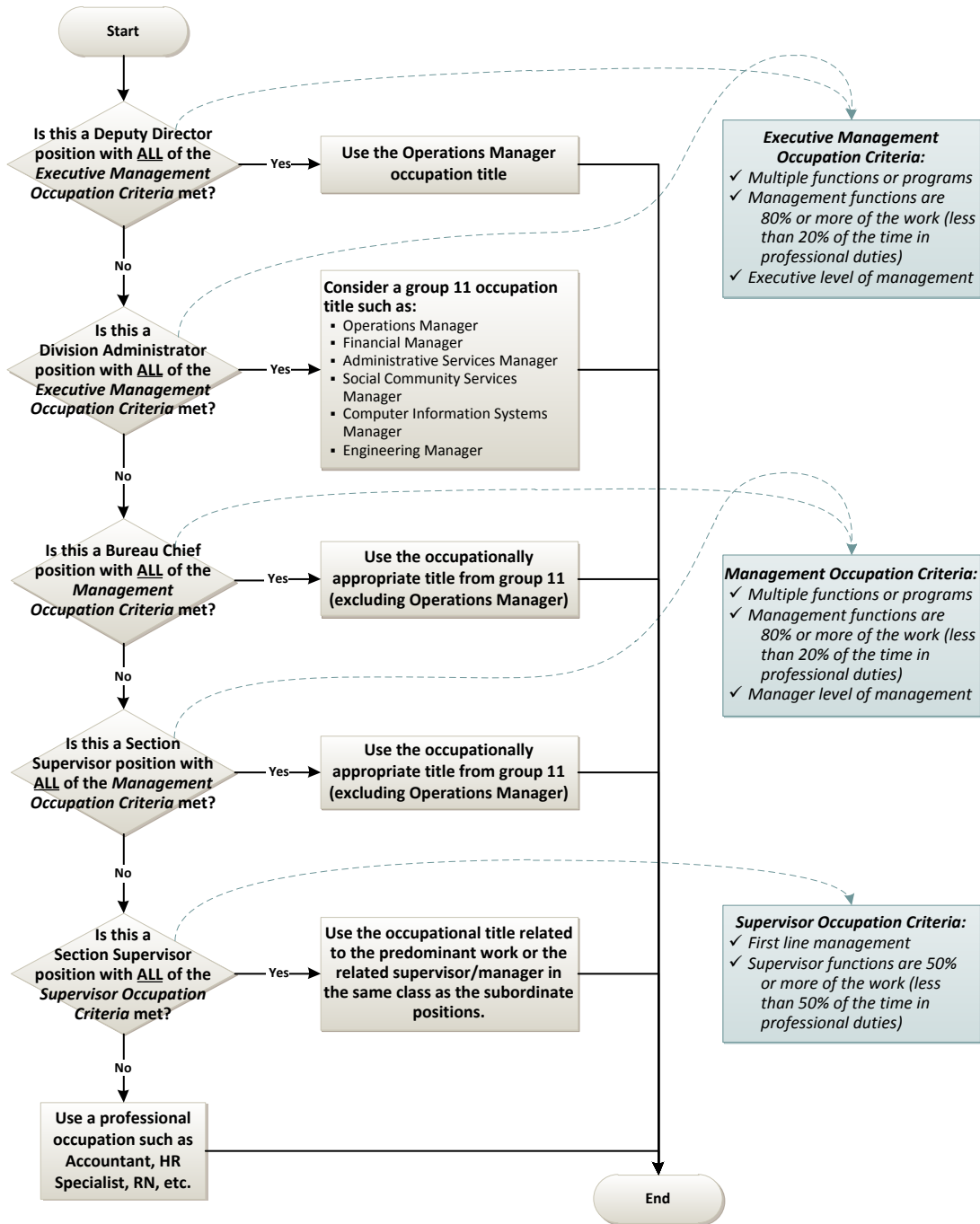
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Supervisors: These positions are predominantly responsible for the day-to-day performance of subordinates, and for accomplishing specific goals. They ensure employees adhere to standards set by higher-level managers, and may discipline employees, or work with managers to discipline employees. Such positions are typically concerned with assigning work, implementing and explaining methods, training employees, and short-term objectives.

For purposes of classification, a supervisor is defined as, "an individual having the authority on a regular, recurring basis while acting in the interest of the employer to hire, transfer, suspend, lay off, recall, promote, discharge, assign, reward, or discipline other employees or to effectively recommend the above actions if, in connection with the foregoing, the exercise of the authority is not of a merely routine or clerical nature but requires the use of independent judgment." 39-31-103 (11)(a), MCA
Section supervisors, first-line supervisors, or the chiefs of smaller, single function bureaus will meet these requirements. Supervisors who supervise employees at least 50% of the time may be classified in the appropriate supervisor/manager occupational title. The supervisor decision tree may help a classifier determine whether or not a job must be classified in a supervisor title.

Lead Workers: Positions that are lead workers must not be placed in a supervisory class. Lead workers perform the same or comparable work as the employees they lead. In addition, they review the work of their subordinates, and report on the performance of employees as part of the formal performance appraisal process. They may also assign work tasks, establish work pace, demonstrate proper work methods, resolve problems, and report to higher level supervisors. They generally recommend process and procedural changes, or provide modifications to the workplace or workflow, to improve efficiency or effectiveness.

SUPERVISORY AND MANAGERIAL OCCUPATION DECISION TREE



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Requests for New Job Codes or Occupations

State HR creates, maintains, and modifies the available job codes and job code titles for broadband. Agencies may request new job titles by submitting a formal request to State HR, along with their business need. State HR shall consider the agency request, and may develop new job codes considering the following.

- Requests for new job codes must include a suggestion for an occupational title and SOC group, and the reasons for the new occupation or job code level. In addition, the agency shall provide information regarding the minimum knowledge, skills and abilities needed to perform the essential functions for the occupation. Whenever possible, positions must be assigned to existing occupations and levels.
- State HR shall review the agency's evaluation of the position to determine the best occupational match and appropriate level of work. If the review indicates a new class is needed, a new job code and occupational title may be developed using the following guidelines.

Guidelines for Occupational Development

All agencies may provide input and comments for any proposed occupational description. State HR may develop classes for SOC and O*Net occupations considering the following:

- Whenever the occupation already exists as a permanent category in O*Net, State HR may create the occupation. The agency shall consult with State HR to ensure an occupation exists as a permanent category, as this list changes frequently.
- Categories that are being researched in O*Net (described as, "This title represents an occupation for which data collection is currently underway", or numbered as "XX-XX99 with an extension) may be considered on a case-by-case basis

Each proposed request that does not have an existing SOC or O*Net permanent category must have the following

- salary survey information exists and is available from the salary survey sources used by State HR,
- the proposed title must have at least five employees,
- State HR must have a need to track the occupation separately from existing titles. For example, licensing, certification, or other governmental requirements may make a new Montana Specific description necessary

State HR may deny a request to create a job code or occupational title. Some reasons State HR shall not establish new job codes, levels, or occupational titles include:

- The work is substantially the same as an existing Montana job code with an already existing O*Net description. For example, State HR shall not create an exercise training officer, as this working title identifies specific positions within the training and development specialist occupation.
- Market analysis information is not available from sources used by State HR.

Broadband Classification System

- The requested title and description span separate major SOC occupational categories.
- The position is not a classified position in broadband.
- There are fewer than five positions proposed for a band level or Montana specific title.
- The work does not occur for the occupation at the requested band level. For example, Attorney work, as described by the occupational standard, does not occur at band five, so State HR shall not create a band five job code for a lawyer.

Occupation Titles

Titles for most jobs are similar to those found in SOC or O*Net. Occupation titles may be adapted from these to more closely conform to state titling conventions, or agency needs.

The following titling conventions may apply to occupation titles in the state's job code list. Working titles may differ and are not found in the job code list.

- ◆ The titles used for positions at classification factor level 1 or 2 may include the designation, "clerk" or "aide". Positions at this level do not require specialized training beyond on-the-job experience or training to perform the predominant duties. "Clerk" typically refers to support work related to a professional occupation (ex. accounting clerk) while "aide" refers to more technical occupations.
- ◆ The titles used for positions at classification factor level 3 or 4 may include the designation, "assistant" or "technician." Positions at this level frequently require specialized technical level training, or more extensive on-the-job training. "Assistant" refers to occupations related to administrative work, while "technician" refers to either a technical level of work in a professional occupation (ex. accounting technician) or a technical occupation (ex. computer technician).
- ◆ The titles used for positions at classification factor level 5 and above may include the designation, "specialist" or "technologist." Positions at this level usually require advanced technological training (technologist) or professional training (specialist). State HR will consider other professional titles, such as analyst or consultant for positions at this level and above based on the work performed and common usage, such as budget analyst. The title "officer" will only be applied to occupations that are typically organized on a quasi-military structure and/or traditionally referred to as "officer", regardless of factor level (such as highway patrol officer)
- ◆ State HR may use other classified titles for highly specialized work or work that has a widely accepted occupation title in the private sector (for example, network administrator) when these titles are similar to O*Net or SOC titles. Agencies may use working titles to distinguish positions within the agency for recruitment, performance, or other business needs.
- ◆ SOC groups supervisors of professional occupations with the occupations they supervise because they often need the same type of training, education, and experience as the workers they supervise. State HR may develop specific supervisor classes tied to professional occupations as requested based on the occupational development criteria described above. Allocation to any Montana

Broadband Classification System

Specific supervisor/manager class requires supervision or management as the predominant work (must manage people, and must supervise or manage at least 50% of the time). Titles in group 11 must manage people and perform high-level management, at least 80% of the time.

Job Code Numbering Conventions

The numbering system derives from the Standard Occupational Classification system (SOC), from the Bureau of Labor Statistics (BLS). The SOC classifies jobs at four levels:

- ◆ Major group (Job Family)
- ◆ Minor group (Job Function)
- ◆ Broad occupation (Job Sub-function)
- ◆ Detailed occupation (SOC Code, found in O*Net) (see page 7)

All occupations belong to one of 23 major groups. In the state's numbering system, the first three digits usually equal the first three SOC digits, whenever possible. The final number usually equals the factor level. State HR creates and maintains job codes that correspond to the SOC system. State HR may correct and revise titles and numbering at any time. State HR shall notify agencies affected by title or numbering revisions. Classifiers may not conduct new job evaluations based on a corrected title or numbering.

Working Titles:

Working or functional titles describe the purpose or function of a job more completely than the occupation title based on SOC and O*Net. For example, all accountants are grouped together. An agency may differentiate between the overall responsibilities of accountants by using working titles such as grant accountant or tax accountant.

The working title may be used when placing a vacancy announcement, on business cards, etc. Agencies shall consider their business needs when assigning working titles.

IV. State Human Resources Division Responsibilities

State HR develops and maintains the broadband classification system for all state employees in the executive branch as required by 2-18-201 through 209, MCA, with some exceptions (2-18-103 through 107, MCA). State HR has responsibility for the integrity and oversight of the classification methodology. The following are some of State HR's responsibilities for the classification plan:

- State HR is responsible for the broadband classification policy. The broadband classification policy is found in the Montana Operations Manual (MOM).
- State HR develops, maintains, and modifies benchmarks and criteria used for allocating positions. Included are adjustments to:
 - the factor level descriptions,
 - occupations,
 - benchmark descriptions
- State HR investigates and responds to employees' classification appeals at step 2, as required by 24.26.508, ARM.
- State HR provides classification training, certification, and mentoring to agency staff.
- State HR maintains the list of eligible certified classifiers, as described in the broadband classification policy.
- State HR provides interpretations of classification issues and provides advisory opinions.
- State HR may classify positions, or approve classification actions by consultants, for small agencies without delegated classifiers.
- State HR classifies or approves classifications for all human resource positions, and for managers of human resource positions
- State HR may perform other classification reviews and evaluations, either independently or upon agency request, and as staff time and work load permit.

Monitoring Delegated Classification Authority

2-18-102 (2), MCA allows State HR to delegate authority granted to it under parts 1 and 2 to agencies that effectively demonstrate the ability to carry out the provisions of parts 1 and 2, provided those agencies comply with the policies, procedures, timetables and standards established by State HR. As further established by the Broadband Classification Policy and agency delegation agreements, State HR monitors classifications within agencies by periodically reviewing delegated agencies' classification actions.

State HR may correct a position's classification upon request by agencies, or upon State HR's review. State HR may correct a position's classification when it identifies:

- incomplete or erroneous information about essential job duties; or
- inconsistent application of the classification procedures or standards within an agency.

Broadband Classification System

If State HR identifies a pattern of improper classifications or application of the classification procedures, State HR may rescind a classifier's certification to classify jobs for the state. State HR may also revoke or suspend an agency's delegated authority for classification if there is a pattern of improper application of classification principles or failure to meet the terms of the delegation agreement.

V. Agency Responsibilities

As described by statute, policies, delegation agreements, agency human resources and agency managers may have certain responsibilities for their classified employees. Some of the general responsibilities for human resources and managers within agencies, which are related to classification, include the following.

- Agency managers are responsible for assigning the work and determining essential functions performed by each subordinate employee.
- Agency managers and agency human resources staff write current and accurate job descriptions, reflecting minimum job expectations, as required by the broadband classification policy.
- Job descriptions are public information, and must be promptly provided to employees or the public, upon request.
- Agencies have the opportunity to review draft broadband classification standards. Agencies may provide input or comments on draft standards, and may assist State HR regarding the accuracy and adequacy of new or modified standards.
- Agencies shall inform employees about any classification actions that may affect them.
- Agencies without a delegation agreement shall provide new job descriptions and other appropriate documentation either to a consultant, or to State HR, when the duties and responsibilities of a position substantially change.
- For agencies without delegation agreements, job evaluations that are classified by a consultant must be reviewed and approved by State HR. Consultants shall be certified by State HR in the state's classification methodology.
- Agencies with more than 100 employees shall seek delegation authority, or seek the assistance of a contractor or consultant for classification services. Consultants providing classification services shall use State HR's current classification methodology.

In addition to the general responsibilities required by agency human resources and agency managers, State HR may delegate the authority to classify positions to agencies. A formal delegation agreement outlines the responsibilities of the agency regarding classification. This delegation agreement may be revised at any time. Agencies that wish to maintain delegation authority shall sign the new agreement, or arrange to contract their classifications with a consultant. Some of the authority and responsibilities belonging to agencies may include the following:

- The agency shall provide a list of the agency's classification actions upon request. This list may be used during State HR's agency classification audit.
- Job evaluations are public information. Agencies with delegation agreements shall provide job evaluations, including supporting documentation such as job audit notes, upon request.
- Agencies shall provide background and responses, including memos or supporting documentation, for classification system audits or reviews.

Broadband Classification System

- Agencies with delegated classification authority shall correct inaccurate classifications at the direction of State HR, as required by the classification policy and the delegation agreement.

Classification Appeals

- Employees have the right to appeal their classification, as provided by 2-18-203 (2), MCA.
- Managers do not have the right to appeal their employees' classification.
- Agencies shall handle classification appeals at step one, as provided for in 24.26.508, ARM. Agencies with delegated authority shall provide a formal response for classification appeals at step one. Agencies without delegation authority may contract their classification appeal at step one to a certified classifier in another agency, or to a certified consultant.
- Agencies shall provide information to employees about their rights and responsibilities regarding the classification system, classification procedures, and the classification appeals process upon request.
- Employees covered by a collective bargaining agreement may have the right to union representation during a classification appeal.

VI. Factor Level Standards, Tips, Examples, and Application

Introduction

Classification measures the difficulty of the mental processes necessary to perform the predominant work, and the knowledge and skills needed to perform the essential functions, at a **minimally** acceptable level at the **beginning** of employment.

The answers to the following questions may help determine the proper classification factor level:

- What choices or decisions are required to perform the assigned work?
- What factors or information must be considered in making these choices and decisions?
- What is the nature and relationship of the factors or information? Are they complete and directly applicable, or do they involve unusual circumstances and incomplete or conflicting data?
- How are procedures or processes carried out?
- What is the typical level of education and experience required to perform the work?

The originality and resourcefulness required to solve problems, as well as the difficulty of the problems solved, have a direct effect on the level of knowledge and skills needed to perform the work. Classification considers the knowledge or skills necessary to perform the predominant duties (50% or more of the work) assigned to the position at a **minimally** acceptable or entry level. In other words, it identifies the lowest level of competence needed to accomplish the work. It does not include experience, education, or training developed on the job after hire, or the level of competence that might be expected of an experienced or top performing employee.

The number of duties or amount of work at a given level of difficulty does not increase the complexity level assigned to a job. Knowledge or skills that may be needed to perform non-predominant work at a higher level than the predominant work may be considered when setting proficiency levels, or when setting pay within a pay range. However, this does not increase the overall classification factor level. Examples include the following:

- Organizational changes may result in more duties at the same level of difficulty. This would not affect the allocation of the position to a given factor level, but management may choose to recognize the change through pay.
- An employee may be asked to complete a greater number of permit applications. The agency may award a lump sum payment, called results-based pay, for accomplishing the higher workload, if allowed in their pay plan rules or collective bargaining agreement.
- An agency may use a pay approach such as a temporary pay increase to recognize a temporary change in duties. This temporary pay increase must be removed once the employee no longer performs the temporary duties.
- An employee may take on a task requiring a higher skill level during a portion of the predominant duty. The higher skill level may result in higher pay, but not a higher band level.

Classification Factor Levels

Classification factor levels are established in a logical hierarchy from the least complex to the most complex. The first level consists of simple clear-cut procedures with few steps and limited choices based on easily recognized facts or objects. The highest level involves developing or applying complex systems; resolving critical problems that may require synthesis of conflicting concepts or viewpoints to reconcile opposites into a unified whole; and statewide choices that are frequently ambiguous, yet critical, based on accurate interpretation of vague concepts or legislative intent. Certified classifiers must start at level one, then work their way up, when evaluating the work.

Each factor level discussion includes:

- A statement of the mental operations involved in applying procedures, techniques, or theories when performing the predominant work. This includes a description of the typical work elements and examples of tasks at that level of competency.
- Tips to consider when applying the factor level discussion.
- Typical work examples demonstrating the application of the intent of the factor level language.
- A description of the knowledge or skills needed for minimally acceptable performance of all duties and the education or training and experience **typically**² needed to perform them.

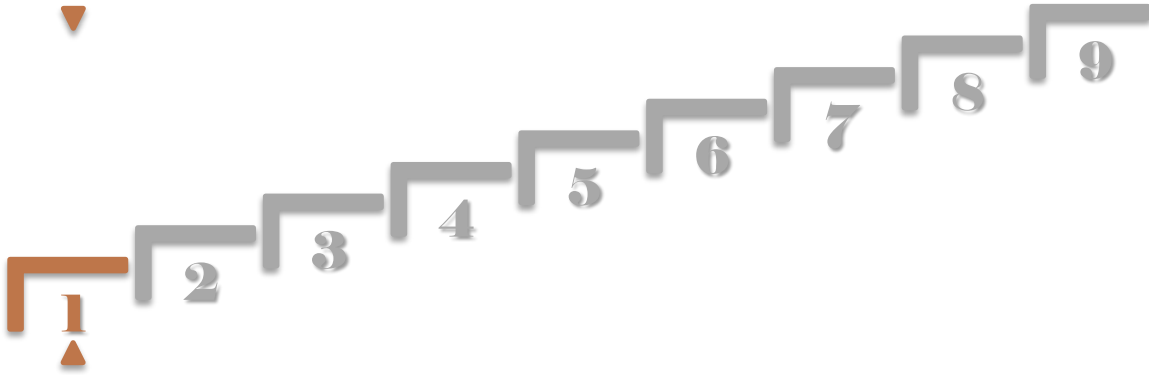
Case law and federal guidelines make it clear that the application of minimum qualifications is a “test” in the same sense as an aptitude or performance test. Creating knowledge or skill requirements that cannot be demonstrated to be job-related may cause an adverse impact on women and minorities, and has been found to constitute discriminatory practices by the Equal Employment Opportunity Commission and the courts. Accurate classification requires careful matching of the qualities or difficulty of the work with the knowledge and skills that are required for the essential functions.

Using the Classification Factor Level Definitions

Trained classifiers assign a factor level by evaluating and comparing the predominant work to the factor level descriptions. Some of the factor levels in this manual contain both the non-supervisory and the supervisory or managerial factor level descriptions.

For factor levels six through nine, the supervisory or managerial factor level descriptions must only be applied when the position performs supervision or management (manages people and performs managerial responsibilities) predominantly (at least 50% of the time). If the position does not supervise and/or manage at least 50% of the time, that portion of the description does not apply. Supervisory duties that are non-predominant may be treated as a separate compensation issue.

² *Note: Education and experience statements **must not** replace the analysis and evaluation of complexity of the job duties. Classification can only be justified by comparison to standards.



Level One Standard

Work involves limited steps in which choices are apparent with proceeding steps depending on previous steps. Procedures are clear-cut and work elements are easily recognized objects that are commonly distinguished from other features. Data (or objects) are transferred from one format (or location) to another without making changes or corrections. Work requires basic literacy and the ability to operate simple tools and equipment.

Tips, Hints, and Pointers:

Think, "lettuce on the bun", and yes or no answers.

Work Examples:

Examples may include placing mail documents into the right mailbox by reading the name on the document, filing and copying documents, starting washing machines, or assembling food trays.

Applied Factor Level Language:

Office Clerk

Work consists of compiling, filing and mailing procedures that involve no more than a few steps. Each step, such as copying a document, compiling into a bin by addressee and mailing out in one weekly mailing, is dependent on the previous step. Such tasks are clear-cut and directly related. Typical work elements involve documents that have easily recognizable features such as attached written instructions, names, or alphabetical or chronological characteristics. Such work involves operating a copying machine by executing a few steps.

Laundry Worker

Work consists of simple, clear-cut procedures in the collection, laundering and distribution of bedding, towels and other linens. Work involves no more than a few steps where each preceding step is dependent on the previous step. The machinery, such as washing machines and folder/mangle, used requires only a few simple steps to operate and others perform any necessary adjustments or maintenance to the machinery.

Food Service Worker

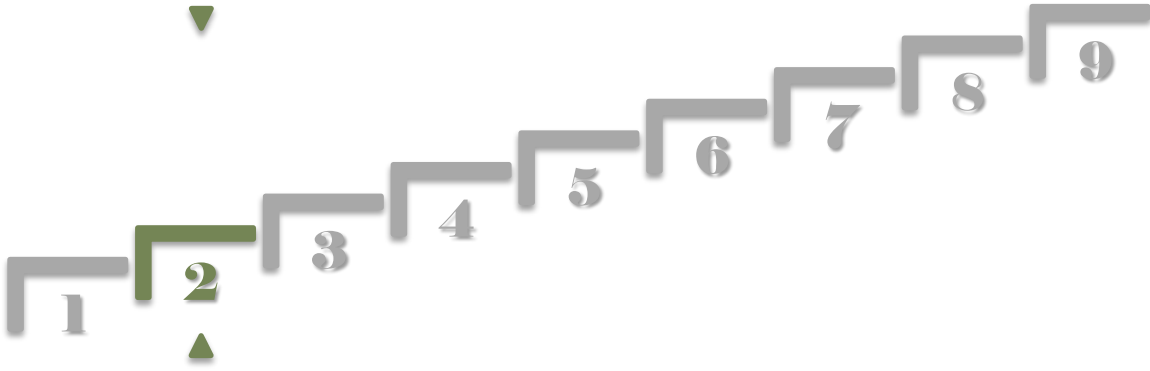
Work consists of a number of easily learned tasks in the setting up of food for consumption, cleaning and sanitizing food service equipment and food service areas. Well-established work methods and guidelines that leave little discretion determine the course of action. Few variations exist within assignments. Tasks

are frequently repeated. The work involves the use of a dishwasher that is operated by executing a few steps.

Typical Education and Experience:

**This statement supplements the description of the work and must not be used to justify factor level allocation.*

The knowledge and skills needed are typically reached through completion of education or experience beyond grade school, up to a high school degree or equivalent training and experience. Any further training is typically acquired on the job.



Level Two Standard

Work involves the semi-skilled to skilled application of a combination of procedures, methods and techniques to routine, recurring assignments. Procedures are frequently repeated and involve related or sequential steps; the order of processes or operations may vary to efficiently accomplish the work. Data or work elements are compared, corrected or brought into compliance with established standards or criteria. Typical work elements are categorically related but may have different requirements or include a combination of processes to complete a task. Work requires sufficient knowledge of work processes to identify factual differences between a number of recognizable situations to properly choose and sequence activities or processes.

Tips, Hints, and Pointers:

Think, "Do you want fries with that?" This includes making limited choices from a menu or from a list of choices.

Work Examples:

Examples may include opening an envelope and reading the contents to determine a mail recipient, receptionist work in answering and directing calls, finding or assigning tax numbers, correcting unemployment insurance forms, cooking predetermined food items, or processing a renewed license.

Applied Factor Level Language:

Office Clerk

The work involves the skilled application of closely related methods to routine, recurring assignments. Tasks related to the finding or assigning of tax account numbers involve several steps that may vary to efficiently sequence tasks. For example, searches may be made to locate the tax account number for a payment, and it may turn out that the business does not have an established account. This would then require entering the business on the system and assigning an account number. Such work, as well as batching, logging and processing forms, involves actions that require discerning differences of a factual nature between a few recognizable situations. Examples include separating forms based upon the type and completeness of the form, and adding up totals from one set of forms and comparing to totals on another form.

Employment Services Assistant

Work consists of semi-skilled application of a number of related methods and techniques in data entry, unemployment insurance claims-taking, public contacts and interviewing. Assigned work includes comparing details on unemployment insurance forms and registration forms with standards, noting deviations from the standard and making minor corrections to bring forms into compliance.

Cook

Well-established procedures and sequential steps govern the kind and amount of product to be made. Procedures are frequently repeated and assignments are generally recurring. Duties include multi-step procedural assignments involving the determination of appropriate procedures and processes. For example, this position would follow a standard recipe to make a cake and would make appropriate procedural decisions based upon flavor or type of cake required as well as ingredients available.

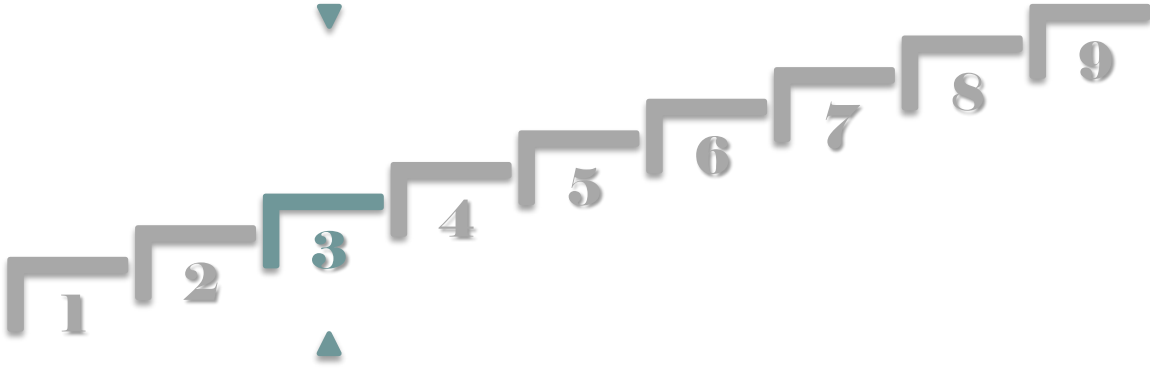
Licensing, Certification & Permitting Clerk

The licensing and renewal processes involve discerning whether certain materials are included with the application, such as an exam and passing score, documentation of inspection, documentation of good physical health or correct fee. This involves discerning differences of a factual nature between a few recognizable situations. Tasks in the process may be problematic because of the sequencing and may vary depending upon information submitted. For example, while some applications received may include all the information necessary for licensing, others may not. If the proper information is not included, the proper procedure may require referral to an inspector or back to the applicant for resolution/correction depending on what is missing.

Typical Education and Experience:

**This statement supplements the description of the work and must not be used to justify factor level allocation.*

The required knowledge and skills are typically acquired through completion of a high school degree, or 1-2 years related experience, and/or training, or the equivalent.



Level Three Standard

Work involves systematic, detailed, skilled application of related methods and techniques, and examination of multiple procedural or technical variables. Typical work requires the selection of appropriate courses of action based upon identification and examination of data. Decisions are based on a combination of variables that are readily observable in nature, and modification of the structure of work elements, the content of the data, or basic work formats. Work requires the knowledge of appropriate standardized procedures, or sources of information, and the ability to determine courses of action based upon standardized rules and regulations, or the skill to operate tools and equipment that require some training or the completion of on-the-job training programs.

Tips, Hints, and Pointers:

Think, "Have it your way". This may include rearranging a structure or making something new from what someone already has available, based on standards, rules, or procedures.

Work Examples:

Typical examples may include responding to a customer service complaint, creating new forms or letter templates, processing accounting claims, determining benefits eligibility, or repair and maintenance work.

Applied Factor Level Language:

Clerk Supervisor

Assigned work is illustrated by examining the observable and functional characteristics of various driver privilege documents, new or amended driver control actions and processing errors; and determining a course of action based upon a combination of variables. This is the selection of appropriate courses of action based upon identification and examination of the data.

Accounting Technician

The position reviews and examines vendor and SABHRS data to process claims and respond to claims inquiries. The tasks related to the processing of claims are procedural and the practices and techniques are all well established. The position is required to determine the adequacy of the information and its conformity to programmatic procedures and policies. Skilled application of related methods and techniques and examination of multiple procedural variables is characteristic.

Licensing, Certification, and Permitting Technician

Assigned work consists of the application of systematic and detailed procedures such as verifying training, out-of-state status and qualified sponsors, and administering examinations. The assignments are categorically related certification or re-certification but have features such that different processes are applied. The incumbent must decide a course of action depending on a combination of variables in the certification process. This is the selection of appropriate courses of action based upon identification and examination of this data. This work is not highly detailed, diverse nor does it involve unrelated methods and techniques.

Eligibility Assistant

The work consists primarily of systematic and detailed procedures. The knowledge of a body of standardized rules and regulations and basic office procedures. Requires a general knowledge of interviewing techniques to gather information through initial client contact. This is the selection of appropriate courses of action based upon identification and examination of this data. The ability to select the appropriate procedures and sources of client information is necessary to proceed with benefits determination. Decisions are based on a combination of variables that are readily observable.

Duplicating Press Operator

Assignments are somewhat varied, involving the skilled application of several related methods and techniques. Requires the ability to carry out complex printing procedures, selecting proper procedures and methods to complete the process. Decisions require modification of the structure of work elements, the content of the data, or basic work formats.

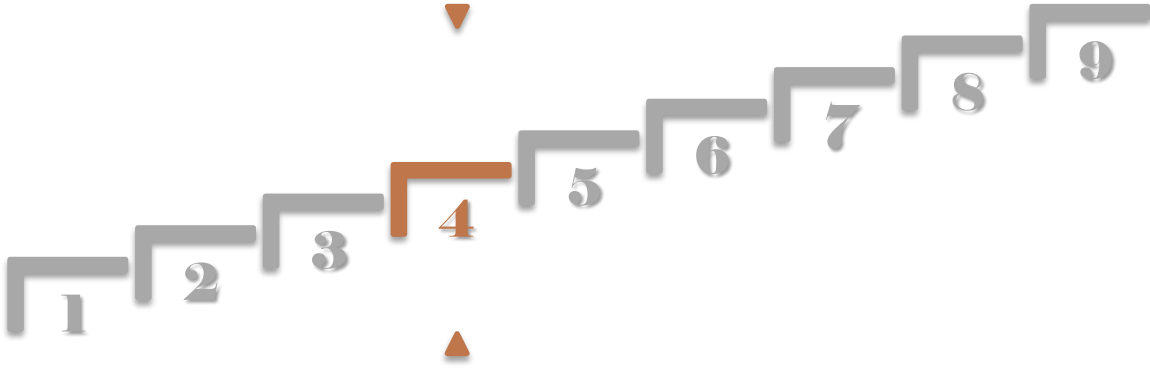
Maintenance Worker

This position performs a wide variety of related manual and semi-skilled work, repairing and maintaining buildings, grounds and related facilities. The assigned work requires the ability to choose the correct procedures from a variety of systematic and manual and semi-skilled maintenance methods and techniques to accomplish tasks.

Typical Education and Experience:

**This statement supplements the description of the work and must not be used to justify factor level allocation.*

The required knowledge and skills are typically acquired through completion of high school, or 2-4 years job-related experience and/or training.



Level Four Standard

Work involves seeking out and gathering data that is not readily available, summarizing and drawing conclusions from data, and/or fabricating and composing work elements into new arrangements. Procedures include: interpretation of data, information and guidelines; coordinating pre-determined, sequential activities to complete projects in a project-driven work environment; and evaluation of related procedures and circumstances. Work requires knowledge of an occupationally specialized vocation, in which procedures may be modified to fit conditions.

Tips, Hints, and Pointers:

Think, "Find out how to do it". This includes researching and interpreting something from an unrelated source to provide an answer, complete a project or solve a problem."

Work Examples:

Typical examples may include lower-level computer help desk work, interpreting and indexing legal opinion document requests, inspecting and testing aggregate samples during highway construction, carpentry, and supervising correctional officers.

Applied Factor Level Language:

Accounting Technician

Work involves the interpretation to the applicability and intent of contract language. Prior to interpretation of data, this position may need to gather data that is not readily available through the location and extrapolation of the data from the contract then summarizing and drawing conclusions from this information. Assignments are varied and reflect a range of accounting activity. Methods are unrelated because of the diverse financial functions.

Information Systems Operator

Work involves gathering data from users that may not be readily available when interpreting the nature of the connection to the state system. This position involves a variety of assignments that require the interpretation of data and drawing conclusions as to the appropriate corrective action to be taken.

Electronic Equipment Technician

Work requires searching, interpreting, and summarizing information needed to troubleshoot hardware problems. Work elements involve gathering data that requires interpretation of a combination of variables and resolution of problems.

Licensing, Certification and Permitting Specialist

Work involves the skilled application of detailed methods and techniques. This position is responsible for various detailed licensing/certification/permitting processes, which involve a variety of subsidiary processes as well as for less routine, recurring work such as monitoring licensees by facilitating a detailed complaint process. This position provides input into the rules, regulations and legislation governing the licensing, certification and permitting program processes by searching for and/or gathering data that isn't readily available and requires interpretation. This input involves fabricating or composing new or significantly modified guidelines.

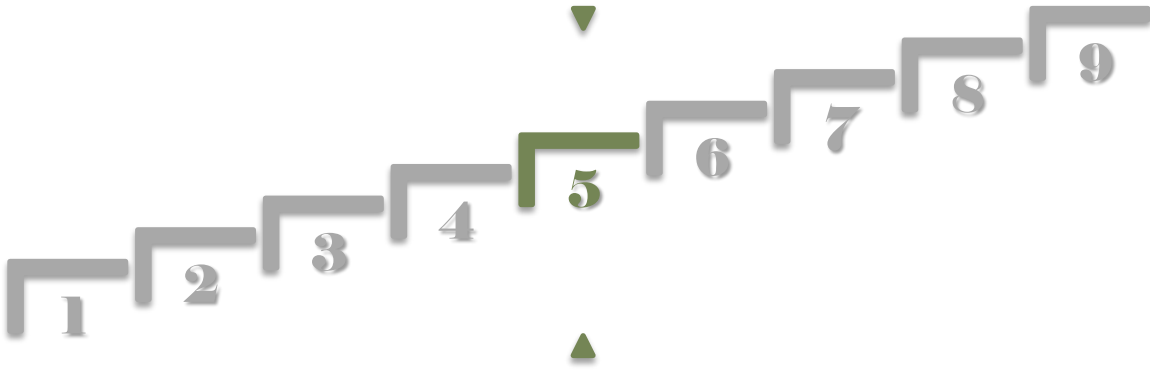
Maintenance Worker

Work involves less routine, unrelated assignments such as constructing cabinets, repairing boilers, rewiring electrical circuits, or replacing plumbing parts. Work requires fabricating or composing new or significantly modified objects such as carpentry, electrical, and plumbing duties. Work also consists of skilled application of a number of unrelated methods and techniques to a variety of maintenance assignments. This position performs skilled work and supervises the repairing of heating and plumbing systems and duties in electrical, carpentry, welding, masonry and plumbing work of a maintenance nature.

Typical Education and Experience:

**This statement supplements the description of the work and must not be used to justify factor level allocation.*

The required knowledge and skills are typically acquired through the completion of high school followed by 4 or more years of job-related experience **or** completion of a work related vocational program or post-secondary curriculum and 2 or more years of job-related experience.



Level Five Standard

Work involves the application of professional principles and practices to perform standard, recurring professional assignments. Procedures require analysis of interrelationships of multiple variables and their applicability to practical problem solving. Data may be conflicting or scarce, and work assignments require extraction of data from a wide variety of sources, and determination of its applicability, suitability and quality. Work requires professional knowledge of the rules, procedures, methods or operations related to an occupation or a professional field and the ability to apply these to a practical level of problem solving.

Tips, Hints, and Pointers:

Think, "Bring something up to a standard", or "apply a professional concept". This is the first of the professional levels.

Work Examples:

Typical work examples include patrolling highways to identify violations by drivers; ensuring individuals or businesses comply with established regulations; examining buildings to ensure they are up to code; coordinating and inspecting contractor work on complex highway construction projects.

Applied Factor Level Language:

Administrative Specialist

Work involves using intellectual analysis and evaluation and the application of professional principles and practices to the standard activities of grant administration and writing. Work elements involve procedures that include extracting and considering data regarding reclamation activities and refining procedures based on changing standards from the Office of Surface Mining. The position interprets data to determine the best methods and procedures to expedite obtaining grant monies and selecting contractors to accomplish project activities. Assignments are routine in that basic methods and procedures for the grant and project process are in place. Work elements such as tracking complex grant procedures and assuring staff and contractor compliance with regulations require extended experience with agency procedures and requirements.

Registered Nurse

The work consists of intellectual analysis and evaluation in the application of principles and practices of nursing to professional assignments. Assigned work involves extracting information from the patient; examining details of the patient's medical history and present illness, considering the applicability of

information including the symptoms associated with a variety of illnesses and resolving medical problems. This work requires solving practical problems by determining how the concepts of nursing and the instructions found in standing orders apply to each patient.

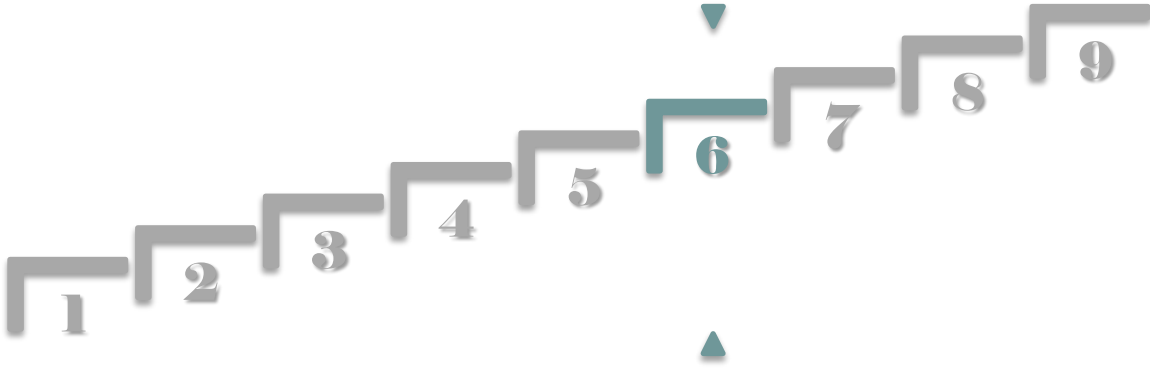
Engineering Project Technician

The work consists of advanced technical assignments involving the application of design plans and specifications and highway construction procedures to projects to resolve practical reconstruction or construction problems. Typical work elements involve a full range of work from coordinating and estimating a wide range of project data to resolving contractor conflicts by interpreting and correlating data from designs and determining how highway construction standards apply or how specifications must be applied based on site circumstances. Projects assigned typically include intricate urban projects, projects with difficult or unusual terrain details, or projects that have unusual or advanced technological processes.

Typical Education and Experience:

**This statement supplements the description of the work and must not be used to justify factor level allocation.*

The required knowledge and skills are typically acquired through the completion of a Bachelor degree and 0-2 years of experience.



Level Six Standard

Work involves the application of the principles and practices of a professional field to diverse assignments in which conflict situations, ambiguous concepts or divergent views are typical. Work requires developing policies, new methods or techniques to resolve sensitive problems through individualized solutions to recurring problems or situations, based on data that is complicated and intricate. Plans or designs must be oriented to complex or uncommon sites, circumstances or natural resource features. Plans and approaches are based upon extensive information, or numerous variables and include determining the relative importance, and value of the data or variables. Modification and testing applications of known and accepted processes to new applications involves diverse parameters and work includes testing for soundness of approach. Work requires demonstrated skill and professional knowledge of a breadth of issues associated with an occupation applicable to complex and/or diverse assignments.

Managerial Level Six:

Job entails management of professional or mixed technical and professional work units; practical management issues and applications; limited range of management activities including revision and adaptation of methods and procedures & interpretation of complex practices, principles or regulations.

Tips, Hints, and Pointers:

Think, "The result or solution is unique". When there are many variables, the solution or result may change depending on the circumstances.

Work Examples:

Typical work examples include investigating a crime or potential crime; programming a new application; engineering a highway project; assessing the medical condition of a patient to make a recommendation to a physician; designing and managing a wildlife population and habitat program.

Applied Factor Level Language:

Compliance Specialist

Resolving complaints from insurance consumers requires considerable research and interpretation of actions of insurance agents, agencies, or companies. Complaints may be based on highly complicated underwriting issues, conflicting information, and misunderstandings, or in extreme cases, criminal intent. Work elements include determining chain of events, agent representations and intent, which is frequently unclear or ambiguous.

Programmer Analyst

Work consists of intellectual analysis and evaluation in applying the principles and practices of system design and computer programming to difficult, diverse assignments. Work requires assessment and development of applications systems. It involves determining the nature of relationships among diverse programming variables, requirements, and systems capabilities in the development of programming solutions.

Engineering Project Manager

Work involves advanced technical and project management work in administering, planning, and coordinating multi-faceted and diverse construction contracts. Projects include numerous contractors and sub-contractors. Duties require interpretation and adaptation of design plans, resolution of designs to complex on-site project characteristics, and frequent conflict resolution with public and private entities. Analysis is required to make exceptions to guidelines and standards and adapt engineering design plans and specifications. Decisions are frequent and highly technical in nature.

Registered Nurse

The work consists of intellectual analysis and evaluation in the application of principles and practices of nursing to diverse professional assignments. Patient data is complicated and involved, and may be ambiguous, requiring interpretation or assessment of divergent views. Assigned work involves resolving difficult and sensitive medical and psychiatric problems through the interpretation or development of policies, techniques and methods. Developing nursing diagnoses and treatment recommendations includes determining the relative importance of diverse variables to develop solutions and treatment plans for each patient. Although work assignments are generally recurring in that the assessment, diagnosis and the development and implementation of treatment plans are always evident, the approach taken to resolve patient problems is individual to each case.

Managerial Work Example:

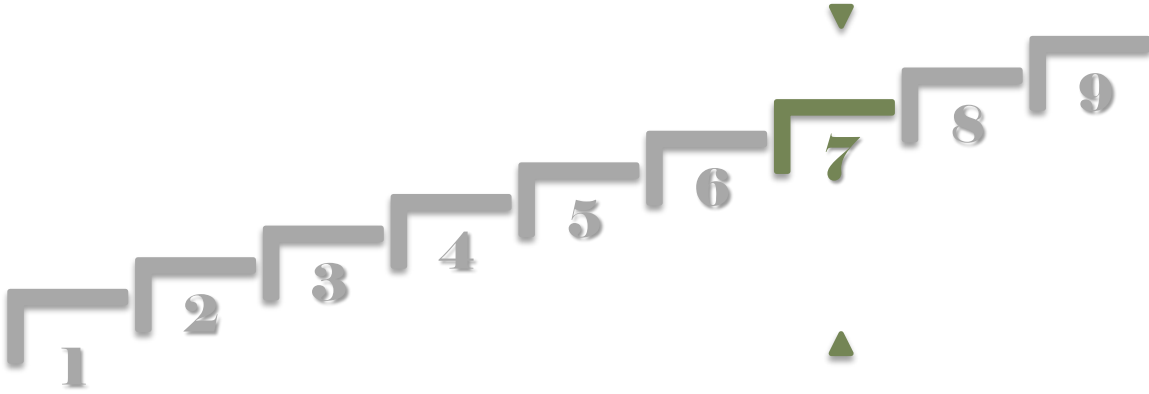
Water Resources Regional Manager

Responsible for overall operation of multi-programmatic functions in regional field office. In assigned region, coordinates program activities with other federal and state agencies, other organizations, and public. Works with Bureau Chiefs, who represent various programs, to establish program goals, objectives, and work plans. Frequently, must assess conflicting situations among parties and resolve problems that involve interpretation of policy, precedent, and legal statutes. Develops and proposes policy and procedure to meet regional needs. Frequently, work involves unique and non-recurring elements.

Typical Education and Experience:

**This statement supplements the description of the work and must not be used to justify factor level allocation.*

The required knowledge and skills are typically acquired through the completion of a Bachelor degree and 2-5 years related experience, or Master degree and 0-3 years of experience, or a Juris Doctorate degree and 0-2 years of experience.



Level Seven Standard

Work is conceptual/ theoretical in nature, and covers a range of topics, in which data are typically subject to interpretation, are extensive and diverse, and in which relationships are ambiguous and undeveloped. Work is characterized by significant depth of analysis. The work involves the testing and application of theory to develop solutions to intricate and unique problems, or the creation of new design concepts and criteria for applications having minimal or limited precedents or guidelines. Coordinating segmented efforts to achieve cohesive approaches is characteristic of the work. Assignments are diverse and non-recurring and may involve testing the soundness of concepts or standards themselves or developing standards and parameters that determine policy or new approaches in a professional field. Typical tasks may include designing tests, studies, or data-gathering systems that lead to the development of standards or new approaches in a professional field, devising and evaluating concepts for approaches to new applications, devices, or broad policies, or developing models, prototypes, and systems that fill in gaps in current knowledge. Work requires professional knowledge, skill and ability sufficient to independently extend existing and accepted practices, rules, laws and policies.

Managerial Complexity:

Management of highly specialized or diverse professional work units; advanced management issues and applications; broad range of management activities including frequent organizational and operational changes, significant policy decisions & pivotal interpretations of conflicting federal, state and other regulations.

Tips, Hints, and Pointers:

Think, "To go where no one has gone before." "Testing, testing, testing"...

Work Examples:

Typical work examples include an attorney presenting a case before a judge, diagnosing and treating psychological disorders, and performing a forensic toxicology analysis in a human death.

Applied Factor Level Language:

Information Systems Support Specialist

Develops statewide direction for software acquisition using knowledge of theories, principles, and practices of computer science; data management products; network capabilities; and computer operating systems,

equipment, and software for both microcomputers and mainframe computers. The work requires substantial depth of analysis in the development of statewide software directions, training programs, and applications programs. Assigned work is developmental and involves evaluating new products, determining the importance of diverse software elements and the technical and budgetary consequences of implementation of new products on state agencies. Requires knowledge of concepts, theories, and developmental aspects of computer science, operating systems, equipment configurations and interrelationships, and software applications for both microcomputer and mainframe computer systems and the ability to independently apply the knowledge to develop new practices and procedures and to meet state agency demands.

Forensic Toxicologist

Determines the nature and extent of chemical involvement in a human death. The work involves substantial depth of analysis to determine cause in an unexplained death. Data analyzed cover a broad range of chemical, toxicological, pharmacological and biological concerns. Information includes facts such as apparent circumstances of death and details and evidence in the investigation that are unclear or are developing. This position performs chemical trace analysis that is unusually subject to interpretation due to the potency and toxicity of many drugs at extremely low levels, extensive pharmacological data due to rapid developments in new drugs and the infinite variety of available drugs. Work assignments involve determining the relative importance and value of diverse elements, characteristics of interrelationships and consequences of alternatives. For example, it is important to consider how the body fluids and tissues behave before and after death and where in the body certain toxins usually accumulate, how they are metabolized, and how they affect the body before a sample can be drawn for analysis. Gaps in information related to drawing appropriate samples are filled by the other facts of the investigation as well as chemical analysis. The breadth of unknowns, interplay between variables and potential for combinations is extensive. The work requires knowledge of a wide variety of applications in the toxicology specialty of forensic science, and the ability to independently apply this knowledge for the purpose of resolving cases of human death which may be precedent setting in nature and set the standard for other Forensic Toxicologists.

Managerial Work Examples:

Engineering Manager

The position is responsible for the administration, supervision, direction, and coordination of the materials used in pre-construction, construction, maintenance, and bridge work. The work includes budgeting, planning, organizing and directing the activities of a major engineering function utilizing knowledge of the theories, principles and techniques of civil engineering and materials engineering and a knowledge of administrative and personnel management. Work consists of managerial planning, coordinating, and implementing a diversified bureau of the highway engineering program composed of a range of technical and professional engineering functions. The work includes responsibility for the accuracy and quality of materials used in highway construction, the fabrication and testing of bridge materials, the investigation of geological abnormalities, and the quality and extent of related research projects. The work involves the resolution of materials problems which may require substantial technological analysis and re-search development. The incumbent develops materials policies and guidelines on materials related issues.

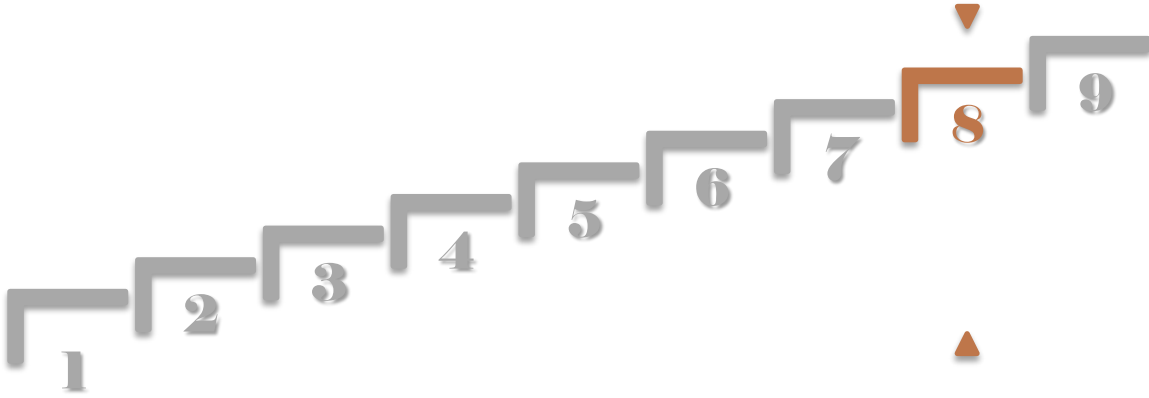
Resource Program Manager

Directs departmental programs within an assigned geographical region, including forest programs and subprograms, land use programs, and agricultural programs. Requires knowledge of multiple areas of resource management, budgeting and fiscal systems, personnel and organizational management, and a variety of state and federal laws and departmental rules and policies related to land management. The work consists of intellectual analysis and evaluation, applying the principles and practices of resource management using different and unrelated approaches and methods applied to a broad range of management assignments. The work includes devising new approaches and policies based upon diverse elements, their relative value and importance, and the consequences of alternatives. Managerial issues include coordinating the efforts of subordinate staff, cooperating counties, private individuals and industry, and other state and federal agencies to develop and achieve cohesive approaches to difficult and unique land management problems.

Typical Education and Experience:

**This statement supplements the description of the work and must not be used to justify factor level allocation.*

The required knowledge is typically acquired through completion of a Bachelor degree and 5 – 8 years of experience, or Master degree and 3-6 years of experience, or Juris Doctor Degree and 2-5 years of experience or Ph.D. and 0-3 years of experience.



Level Eight Standard

Work involves the development and application of systems or technologies, in which issues, facts and concepts cover an extensive range of economic, political and legal issues. Processes relate to major areas of uncertainty in approach, methodology, technological development or unknown/conflicting phenomena or requirements. Public awareness and interest are high, and related laws, rules and regulations are undergoing frequent change. Assignments involve synthesis of a broad range of topics. Data and issues may involve the interrelationships between conflicting federal and state concerns, or technological problems involving extensive data, intricate calculations and conflicting requirements. Work requires in-depth professional knowledge and the ability to integrate data from diverse and unrelated sources, which may be in opposition, to direct or implement organizational plans and major policy decisions, and to develop and implement innovative and comprehensive solutions to problems.

Managerial Complexity:

Work in the management of diverse organizational structures that provide complex and critical services; in-depth management issues and applications including top-level public policy decisions based upon competing and conflicting issues and concerns and public mandates affected by state and federal economic, legislative and legal constraints. Management includes determining organizational goals, staff resource needs, and integrating various program activities into the mission of the larger organizational unit, analyzing resources, organizational structure, legislation, legislative intent and other variables to develop policies, objectives and implementation strategies.

Tips, Hints, and Pointers:

Think, "Top-level management for lots of people", or "controversial, far-reaching work affecting large numbers of Montana citizens".

Work Examples:

Typical work examples include attorneys managing the agency's response to a class action lawsuit; the lead attorney managing a team in a death penalty case; an epidemiologist studying HIV/AIDS and managing the related health program; or the top-level administration of a large division in a larger agency.

Applied Factor Level Language:

There are no benchmark examples of non-managerial work at this level.

Managerial Work Examples:

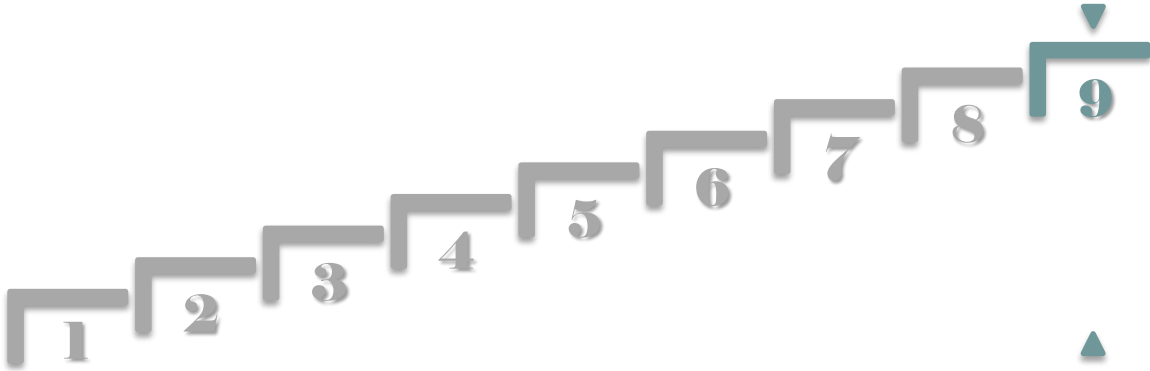
Career Executive Assignment

The work consists of administering diverse professional and paraprofessional work units providing services statewide using knowledge of federal and state program policies, mandates, directives, and intents, various related federal programs, departmental objectives and goals, government organization and central administrative processes. The services provided are not highly scientific (involving technical scientific theory and synthesis applied to a highly specialized field). Policy decisions involve competing State, federal, public, and internal mandates and constraints that are subject to frequent change, and affect diverse and critical services. This position uses extensive statistics to make and defend assumptions and conclusions regarding program effectiveness, problems and direction. Frequent interpretation of federal or state legislative intent and mandate is required to resolve conflicting or potentially conflicting directives. Services must be integrated with separate local and regional services in widely dispersed areas of the state, each with unique requirements and potential conflicts. The work requires knowledge of the concepts and theories applicable to the administration of a professional field to determine the most efficient and effective delivery of services, given economic, social, legislative, and legal constraints.

Typical Education and Experience:

**This statement supplements the description of the work and must not be used to justify factor level allocation.*

The required knowledge is typically acquired through the completion of a Bachelor degree and 8 or more years' experience, Master degree and 6 or more years' experience, Juris Doctor and 5 or more years' experience, or Ph.D. and 3 or more years of experience.



Level Nine Standard

Work is characterized by: development, implementation and/or application of convoluted management systems and technologies; breadth and intensity of effort involving several phases pursued concurrently or sequentially; isolating and defining unknown conditions; resolving critical problems, or developing new theories. Issues considered involve the need to reconcile conflicting laws, rules, legislative intent and/or viewpoints. The work involves in-depth, far-reaching inquiry and analysis of issues requiring the blending of disparate parts and elements into a whole. Processes require integrating analyses of data to discover facts and/or develop knowledge, concepts, or interpretations, and blending together the agency mission, relevant laws and administrative rules, new and developing legislation, rapidly changing technological, social, or other relevant issues into programs and actions to serve the affected public. Work requires knowledge of a professional occupation applied to in-depth and comprehensive inquiry and synthesis, to create innovative or novel solutions, and characterized by the breadth and intensity of effort required to isolate and define unknown conditions. This could include knowledge of government and administrative systems and practices, sufficient experience and skill to respond effectively to a highly sensitive public and associated political and agency relations, and the ability to assess hypothetical situations and impacts and consolidate a unified strategy in response to numerous critical issues and concerns.

Managerial Complexity:

Management characterized by innovative/novel applications of management theory; administers and directs essential public services and assumes role of chief state expert; develops overall agency missions and major policy aspects of related divisions and programs according to legislative intent or in the interest of the state. Serves as highest level technical contact for legislative committees through effective recommendations on intent and parameters associated with major state policies and laws.

Tips, Hints, and Pointers:

Think, "It doesn't happen often, so contact State HR for help".

Work Examples:

Few work examples exist in state government, except deputy directors of larger agencies where the deputy does not share her authority with other administrators, and the other division administrators report to her; or medical professionals such as doctors, dentists, and psychiatrists.

Applied Factor Level Language:

There are no benchmark examples of non-managerial work at this level.

Managerial Work Examples:

There are no benchmark examples of managerial work at this level.

Typical Education and Experience:

**This statement supplements the description of the work and must not be used to justify factor level allocation.*

The required knowledge is typically acquired through advanced educational qualifications and 8 or more years of experience.

Definitions

Benchmark Job Description - A job description with a set band level, agreed upon by all classifiers, which has been established as a standard. It identifies the essential functions of the representative job, as it existed at a set point in time. It serves as a baseline to which other positions can be compared, and cannot be challenged in a classification appeal.

Benchmark Factoring Methodology (BFM) - a classification process that compares work to "benchmark" standards.

Classification - A human resources process for establishing a hierarchy of work

Documentation - The written job audit and the job evaluation explaining the classification decision

Duty - A summary statement describing an action of a job, usually requiring related knowledge, skills and abilities, which contribute to the completion of a specific objective.

Essential Functions – Essential functions are the basic job duties that an employee must perform, with or without reasonable accommodation.

Factor Level Definition – These definitions are to be used by trained classifiers when determining a job's complexity. These descriptions are standards that describe of the complexity of the mental processes used in making decisions during the course of a job's duties.

Job Analysis – This method is used during classification as a process of examining the nature of, or of determining the essential features of, a job's duties and related minimum requirements, as necessary for the successful performance of the job.

Job audit – The method used to examine the nature of a job, essential functions, job duties, and minimum requirements. In classification, this involves three basic steps: job audit, job evaluation, and documentation.

Job evaluation – Trained classifiers apply the BFM to determine the appropriate level and occupation for a job.

Job review – Assessment of a job, to determine if there is a need for classification or reclassification

Knowledge - Familiarity with the facts, truths, and principles of particular subjects or fields.

Manager – These positions are responsible for a function, program or sub-program of the organization, are concerned with overall program performance, and for accomplishing long-term objectives. Such positions often report to a higher-level executive manager and set performance standards, but do not necessarily monitor day-to-day performance of subordinates.

Mixed Position – The work performed in a job is from two or more different occupations.

Objective - A description of work in terms of the results expected or output. An organizational objective, for example, describes one major and important result expected from the efforts of the organization.

Occupation - A grouping of jobs based on similarity of work without regard to level of work.

Occupational classification – Placing an individual job into an occupational category based on similarities of the job's general characteristics.

O*Net – An online database of job titles and information, published by the federal government. The occupational descriptions and information in O*Net have been set as standards, used by trained classifiers, when classifying the broadband's job occupations.

Job Family (Major group) – Occupations grouped together that have similar knowledge, skills, and abilities. Example: LPNs, Professional Nurses, Psychiatric Nurses, and Nursing Services Managers are part of the same job family.

Reclassification – A change in a job's occupation or band level, based on significant changes to the predominant work or essential functions of the job.

Supervisor - An individual having the authority on a regular, recurring basis while acting in the interest of the employer to hire, transfer, suspend, lay off, recall, promote, discharge, assign, reward, or discipline other employees or to effectively recommend the above actions if, in connection with the foregoing, the exercise of the authority is not of a merely routine or clerical nature but requires the use of independent judgment.

Standard Occupational Classification (SOC) – The Standard Occupational Classification (SOC) is a system used by Federal statistical agencies to classify workers into occupational categories for the purpose of collecting, calculating, or disseminating data.

Task A single element of assigned work, any number of which may be summarized into a duty.