

Developing Occupational Questionnaires Workshops

Participant Handouts

Handout #1: Sample Minimum Qualifications & Specialized Experience Questions

Minimum Qualifications Defined

Minimum qualifications are education, experience, or other requirements (e.g., licensure) that an applicant must possess in order to be selected for a particular position or occupation. In the Federal government, minimum qualifications are defined in terms of qualification standards set forth by the U.S. Office of Personnel Management (OPM). *Qualification standards* are intended to identify applicants who are likely to be able to perform successfully on the job, and to screen out those who are unlikely to do so. They are not designed to rank applicants or identify the best qualified applicants for positions.

The primary reference for identification of specific minimum qualifications is OPM's [Operating Manual for Qualification Standards for General Schedule \(GS\) Positions](#) (also referred to in this document as the qualification standards) [Link to www.opm.gov/qualifications]. Positions in the Federal Wage System (FWS) are covered by the [Job Qualification System for Trades and Labor Occupations](#) [Link to www.opm.gov/qualifications/x-118c].

In an automated staffing system, multiple-choice questions are often used to determine whether applicants possess the minimum qualifications for a given position. Applicants who do not possess the experience or education required will not receive further consideration. For this reason, it is critical that the minimum qualification requirements be written clearly and accurately. When the requirements are written clearly and accurately, they describe what is necessary to perform the duties of the position so applicants can assess their own knowledge and experience, and determine whether they meet those requirements. Ultimately, applicants may self-select out of the process if they deem themselves not qualified.

Describing Specialized Experience:

Many positions above the entry level require one full year of full-time specialized experience through which applicants demonstrate that they possess the competencies or knowledge, skills, and abilities (KSAs) to successfully perform the duties of a position. Because announcements posted on USAJOBS® or agency recruitment websites are viewed by many applicants who are unfamiliar with Federal personnel practices, it is important to articulate experience requirements clearly and with minimal use of agency or occupation-specific jargon. For example, it is neither defensible nor helpful to the applicant to indicate merely that “specialized experience is that which is directly related to the position to be filled.”

When announcing at multiple grade levels, it is important to describe the differing experience requirements for each individual grade level. You must clearly articulate the differences in level and complexity in order to make meaningful distinctions between the requirements for the different grade levels advertised. In addition to the position description, you will want to refer to the [Position Classification Standards](#) [Link to www.opm.gov/fedclass/index.asp] for individual series and grade level descriptions.

Describe any additional qualification requirements that the applicant needs to meet for the occupation (e.g. educational curriculum, licensure). Consult the relevant Qualification Standards section or Individual Occupational Requirements (IOR)

(<http://www.opm.gov/qualifications/SEC-III/A/num-NDX.asp>) as needed.

For example, specialized experience for Civilian Payroll Technician GS-544-8 positions could be defined as “One year of experience equivalent to the GS-7 level demonstrating a substantive knowledge of automated payroll practices and principles by performing such duties as: providing guidance pertaining to civilian pay, leave, and benefits; troubleshooting payroll problems; and/or analyzing and correcting civilian pay and leave issues.”

Describing a Combination of Experience and Education

Most qualification standards allow for the combination of an applicant’s education and experience to meet total qualification requirements. In an automated staffing system, it is important to inform applicants of this means of qualification and to collect information from them to determine whether they meet occupational requirements. In the vacancy announcement, describe the relevant method to qualify based on a combination of education and experience.

In a multiple-choice environment, it is critical that you give every applicant, regardless of his/her respective background, the full range of options to locate his or her qualifying education or experience (or both) on the assessment questionnaire. All qualifying experience and/or education, or combinations thereof, must be clearly articulated. In addition, you must give the applicant the option to indicate that he/she does not meet any of the requirements as presented.

Again, given the outcomes associated with applicants’ responses to the minimum qualifications questions in an automated staffing system, the descriptions and response options must be clear and complete. Only with clear and complete descriptions and response options can automation be used to accurately determine whether applicants possess the necessary background to meet minimum qualification requirements. Sample minimum qualifications questions appropriate for use in an automated staffing system are shown below.

Below are examples of how specialized experience can be measured in an automated staffing system using a Yes / No rating format and a Multiple-Choice rating format. These samples incorporate recommended practices discussed above, including:

- Use of clear, unambiguous language that any applicant can understand
- Response options for both qualified and unqualified applicants
- Descriptions of experience requirements at each grade level identified, such that distinctions between grade levels are clear
- Descriptions of education requirements, including references as appropriate

Sample 1. Yes / No Rating Format

Position of Human Resources Specialist, GS-0201-11/12

For the GS-11: Do you have at least one year of specialized experience that is equivalent in difficulty and complexity to work performed at the GS-9 grade level in the Federal service? Your experience must include demonstrated performance (detailed in your resume) in one or more areas described in the major duties in this announcement. This experience could have been obtained in the private or public sector and included the following tasks and/or responsibilities:

- * Performing work related to one or more areas of Human Resource Management covered in the major duties in the vacancy announcement, and applying the regulations, principles, practices and procedures related to the specific program area
- * Assisting senior human resource specialists/professionals with projects in human resources areas such as job analysis, employee selection, position management, training, and compensation
- * Assisting with projects in organizational development, organizational effectiveness, performance management, and related areas

OR

Do you have 3 full years of progressively higher level graduate education in a related field (e.g. human resource management, industrial / organizational psychology)?

OR

Do you possess a Ph.D. or equivalent doctoral degree related to the duties of this position?

- A. Yes
- B. No

2. For the GS-12: Do you have at least one year of specialized experience gained in the private or public sector (equivalent to the GS-11 grade level in the Federal service)? Examples of specialized experience are as follows:

- * Independently providing services and applying the regulations, principles, practices and procedures related to one or more areas of Human Resource Management covered in the major duties in the vacancy announcement
- * Providing technical guidance in human resources areas such as job analysis, employee selection, position management, training, and compensation

* Advising managers on issues in organizational development, organizational effectiveness, performance management, and related areas.

Your experience must include demonstrated performance (detailed in your resume) in one or more areas described in the major duties in this announcement.

Education alone is not qualifying for the GS-12 level; you must meet the experience requirement indicated above.

- A. Yes
- B. No

Alternatively, you may embed all possible options within multiple-choice questions as shown in Sample 2 below. If you use this option, ensure that you have covered all possibilities with your response options.

Sample 2. Multiple-Choice Rating Format

Position of Contract Specialist, GS-1102-9/11

1. From the descriptions below, select the ONE response that best describes how you meet the basic requirement for Contract Specialist.

A. I have completed a full 4-year course of study leading to a bachelor's degree from an accredited college or university.

B. I have at least 24 semester hours in any combination of the following fields: accounting, business, finance, law, contracts, purchasing, economics, industrial management, marketing, quantitative methods, or organization and management.

C. I do not have education as described above.

2. From the descriptions below, select the ONE response that best describes the level of education or experience you possess that demonstrates your ability to perform the work of a Contract Specialist. If your highest level of education or experience is not described below, choose the letter that describes experience or education that you do have.

A. I have at least one year of specialized experience equivalent to a GS-7 (advanced trainee) grade level in the Federal service assisting with or performing the following types of tasks: procuring products and services; administering terms and conditions of contracts; negotiating and awarding contracts and contract modifications; performing price/cost analysis; monitoring contractor's performance; performing work associated with termination of contracts.

B. I have successfully completed two full academic years of graduate-level education or a masters or equivalent degree at an accredited college or university in a field directly related to contracting or to one of the following related disciplines: accounting, business, finance, law, contracts, purchasing, economics, industrial management, marketing, quantitative methods, or organization and management.

C. I possess a combination of specialized experience and graduate-level education as described in options A and B above, such that my percentage of the required education plus my percentage of the required experience equal 100 percent. (Note: only education in excess of the first year is creditable toward meeting the experience requirement when combining experience and education.) To calculate, first determine your total number of graduate hours that exceed 18 semester hours, then divide the total number of your excess graduate semester hours by 18. Next, divide your total number of months of qualifying experience by 12. Now add your percentages of education and experience. The two percentages must total at least 100% for you to qualify under the combination of graduation education and experience.

D. I have at least one year of specialized experience equivalent to a GS-9 grade level in the Federal service procuring a wide variety products and services; administering terms and conditions of contracts; negotiating and awarding contracts and contract modifications using sealed bidding; performing price/cost analysis; monitoring contractor's performance; performing work associated with termination of contracts.

E. I have successfully completed three full academic years of graduate-level education or a Ph.D. or equivalent doctoral degree at an accredited college or university in a field directly related to contracting or to one of the following related disciplines: accounting, business, finance, law, contracts, purchasing, economics, industrial management, marketing, quantitative methods, or organization and management.

F. I possess a combination of specialized experience as described in option D and more than two years of graduate education as described in option E above, such that my percentage of the education required for the GS-11 plus my percentage of the required experience equal 100 percent. (Note: only education in excess of the first 36 semester hours is creditable toward meeting the experience requirement when combining experience and education.) To calculate, first determine your total number of graduate hours that exceed 36 semester hours, then divide the total number of your excess graduate semester hours by 18. Next, divide your total number of months of qualifying experience by 12. Now add your percentages of education and experience. The two percentages must total at least 100% for you to qualify under the combination of graduation education and experience.

G. I do not have the education and/or experience as described above.

Example: Sample Selective Factor Question

An example of a selective factor might be, “Ability to speak Spanish fluently.” This selective factor would be appropriate for screening out applicants for a position such as Contact Representative whose customers are predominantly Spanish-speaking and seeking social security advice. A sample question for assessing this selective factor in an automated staffing system is shown below:

Can you speak the Spanish language fluently?

A. Yes

B. No

Example: Sample Condition of Employment Question

Instructions: Please answer ‘Yes’ or ‘No’ to the following eligibility questions. If you respond ‘No’ to any of these eligibility questions, you will be found ineligible for the position.

A comprehensive background investigation is required in order to obtain a top secret clearance for this position. Are you willing to undergo a comprehensive background investigation which includes, but is not limited to, contact with all references, employers, co-workers, personal associates and a review of your driving record, credit history, criminal history, and military service?

A. Yes, I am willing to undergo a comprehensive background investigation.

B. No, I am not willing to undergo a comprehensive background investigation.

Handout #2: Item-Writing Fact Sheet

Introduction

This fact sheet provides general information on how to develop, or write, task- and competency-based items (that is, questions for applicant response) for the purpose of screening applicants. An overview of how to write items, avoid pitfalls, and selecting (or creating) ranking scales will be covered.

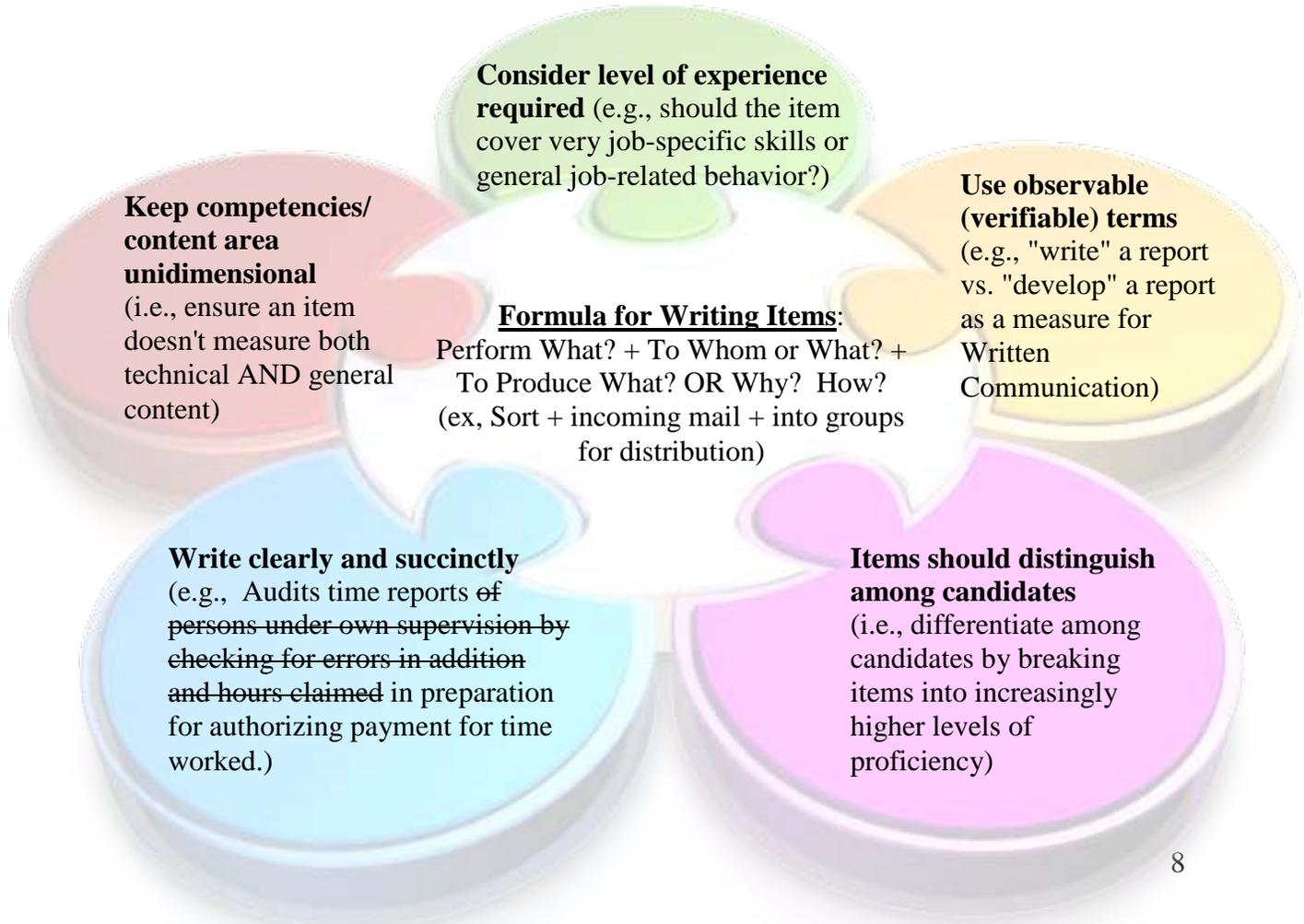
To begin, you will need to identify the content areas (e.g., competencies, KSAs) you plan to measure. Sources of contents areas (or competencies and tasks) include, but are not limited to, job analyses, position descriptions, qualification standards, performance standards, and MOSAIC competencies.

For optimum items, the content areas you identify will need to be both observable and verifiable. In other words, the selected content areas will need to include tasks and activities that can be both seen and measured. Items created from such content areas are referred to as 'behaviorally-based.'

There is no exact number for how many items should be written for each content area; however, the general rule of thumb is to have between 5 or 10 quality items for each content area.

Writing a Behaviorally-Based Item

Writing a good-quality item includes all of the following:



Item-Writing Pitfalls

Some common pitfalls (and how to avoid them) that can occur when writing items include:

Pitfall	Fix
Unnecessary Words	Strip task to the bare elements; make it as concise and clear as possible
Double-barreled Item (includes multiple tasks or components)	Remove extra actions or break the item into two (or more) separate items
Overly Specific Items	Replace specific wording (e.g., Use Excel to add, subtract, and divide subordinates' timecards to calculate time and leave) with more general actions (e.g., Use spreadsheets to track pay and leave)
Vague or Ambiguous Terminology	Replace subjective adjectives and adverbs (e.g., excellent, adequate, best, all, timely, accurately) with more descriptive terms (e.g., verify, provide, create)
Abbreviations	Avoid using abbreviations; spell out the term (or terminology) at all possible times to ensure all applicants understand the item

Rating Scales

There are various types of rating scales, with some common formats listed below:

- **Yes-No** – Applicants select 'A' for Yes and 'B' for No
- **Multiple choice** – Applicants select one answer from the options provided
- **Select all that apply** – Applicants select as many answers as it applies to them (or their experience)

You can also choose whether to use a generic or customized rating scale. The pros and cons of each type are illustrated in the table below:

PROS

CONS

	Generic: Quick to create or use, but may not work as well	Customized: More effort and time to create, but more likely to work
PROS	<ul style="list-style-type: none"> • Relatively inexpensive to develop • Can be easier to develop (i.e., will take less time to develop a questionnaire) • Significant measurement expertise is not required • Can be used for various questionnaires (not tied to a specific occupation) 	<ul style="list-style-type: none"> • Subject Matter Expert (SME)¹ involvement generally leads to greater validity • May provide greater differentiation among candidates • Can be specifically tailored to a particular occupation or grade level
CONS	<ul style="list-style-type: none"> • Little to no SME involvement • May not provide as much differentiation among candidates 	<ul style="list-style-type: none"> • More challenging and time-consuming to develop • Require a greater level of measurement expertise • Require significantly more SME involvement • Cannot be used for other (specific) occupations

¹ An SME is a person with expert knowledge about what it takes to do a particular job. Many people can serve as SMEs (e.g., first-level supervisors, high-performing incumbents in the same or similar position) as long as they have current and thorough knowledge of the job's requirements.

Handout #3: Converting a Crediting Plan to an Assessment Questionnaire Fact Sheet

If you have a current crediting plan, supported by a previous job analysis, you can convert the crediting plan into an assessment questionnaire. This fact sheet will cover how to do that, along with briefly covering a two-tiered review process.

Converting the Content of a Crediting Plan to an Assessment Questionnaire

Step 1. Review the Crediting Plan	Step 2. Identify Important Job Tasks	Step 3. Group Similar Job Tasks	Step 4. Identify/ Develop Items
<ul style="list-style-type: none"> <input type="checkbox"/> Read and make a list of all the content areas (KSAs or competencies) for the target position. <input type="checkbox"/> Note the appropriate grade levels. 	<ul style="list-style-type: none"> <input type="checkbox"/> Make a list of the important job tasks, behaviors, activities, etc. described for each of the KSAs. <input type="checkbox"/> Underline the important 'key words' that distinguish one task, behavior, etc., from another. 	<ul style="list-style-type: none"> <input type="checkbox"/> Group relevant tasks, behaviors, etc., under each content area you have identified. <input type="checkbox"/> Evaluate remaining job tasks, behaviors, etc., to determine if additional content areas should be included. 	<ul style="list-style-type: none"> <input type="checkbox"/> Select suitable assessment questions for each content area. <input type="checkbox"/> Ensure there is a broad enough set of questions to cover the overall position for each relevant grade.

Review Process

A two-tiered review is recommended as good practice. A two-tiered review includes an internal review (e.g., peers, hiring manager, or other Subject Matter Experts (SME²)) and an external review (e.g., appropriate SMEs and customers).

Internal Review

The resulting questionnaire is reviewed to ensure the:

- qualifications are being properly assessed;
- competencies and tasks are job-relevant;
- items and ratings scales are appropriately developed; and
- questionnaire is user-friendly and contains no grammatical errors or omissions.

² An SME is a person with expert knowledge about what it takes to do a particular job. Many people can serve as SMEs (e.g., first-level supervisors, high-performing incumbents in the same or similar position) as long as they have current and thorough knowledge of the job's requirements.

External Review

The goal of an external review is to have the SMEs:

- ✔ verify that the content areas being assessed are critical, needed at entry, and have distinguishing value;
- ✔ review the items for accuracy, clarity, importance, editing, rewording, additions, and deletions; and
- ✔ verify that the items are likely to meaningfully distinguish among applicants.

Handout #4: Sample Occupational Questionnaire Rating Scales

Most automated staffing systems support a variety of rating scale formats. Commonly utilized formats include 'yes-no' and 'multiple-choice' item formats. However, some systems also can accommodate 'forced-choice' (ranking) and 'select-all-that-apply' formats. In some cases, generic rating scales are used. In other cases, customized rating scales are developed for each item. Each of these rating scale types is discussed in more detail below.

Generic Rating Scales

Sample items 1 through 3 below use generic rating scales; they are generic because the same scale can be used across items regardless of the content area being assessed or the position being filled. Using generic rating scales has a number of advantages. First, they are relatively inexpensive and efficient to use. Items can be developed more easily following the steps provided in this fact sheet since the item developer needs to focus only on writing the item itself. Second, significant measurement expertise is generally not required to develop new items. Finally, assessment questionnaires can be developed relatively quickly even when items or templates do not already exist.

1. Sample Item Using a Generic, Yes-No Rating Scale

Instructions: Please answer each question 'A' for YES or 'B' for NO.

Have you successfully done work that involved reviewing various contract proposals or contract bids to determine which one to select?

- A. Yes
- B. No

2. Sample Item Using a Generic, Multiple-Choice Rating Scale

(For the content area: Technical Writing)

Instructions: Select the statement that best describes your training and experience in writing technical policies and standard operating procedures governing the management of data network systems.

- A. I have not had education, training, or experience in performing this task.
- B. I have had education or training on this task but have not yet performed it on the job.
- C. I have performed this task on the job. My work on this task was monitored by a supervisor or senior employee to ensure compliance with proper procedures.
- D. I have performed this task as a regular part of a job. I have performed it independently and normally without review by a supervisor or senior employee.
- E. I have supervised performance of this task or I am normally the person who is consulted by other workers to assist them in doing this task because of my expertise.

3. Sample Item Using a Generic, Multiple-Choice Rating Scale

(For the knowledge area: Federal procurement and contract policies and procedures.)

Instructions: Using the scale below, select the ONE response that most accurately describes your current level of knowledge of U.S. Government procurement and contract policies and procedures (e.g., Federal contract terms, specifications, proposal evaluation, competitive bidding process, acquisition regulations).

- A. I have no knowledge of this area.
- B. I have the knowledge to understand general issues and/or contribute opinions during a casual conversation concerning topics in this area.
- C. I have the knowledge to teach at the high school level or train novices about issues in this area.
- D. I have the knowledge to teach at the college undergraduate level or to train entry-level professionals about issues in this area.
- E. I have the knowledge to teach at the graduate level or to train professionals in this area.
- F. I have the knowledge to write a textbook for graduate or undergraduate study in this area or to develop industry-wide guidance or policy in this area.

Customized Rating Scales

Customized scales, as shown in sample items 4, 5, and 6 below, include rating scales specific to each occupation, grade level, and/or item. SME involvement in development of the scales generally leads to greater validity and may promote upper management level buy-in. Because customized scales provide more specific information against which applicants evaluate themselves, some item developers believe their use can result in greater differentiation among applicants. Research is needed to better evaluate the merits of various item and rating scale formats in particular situations.

4. Sample Item Using a Customized, Select-All-That-Apply Rating Scale

Instructions: Select the items that describe experience you have in communicating with others in writing. (Click on all that apply based on your training and experience.)

- Prepare an email or memo detailing upcoming events for dissemination to a group.
- Proofread or edit the writing of others for content, punctuation, spelling, and grammar.
- Summarize articles or reports on a subject for team or supervisor review and use.
- Write or edit a manuscript for publication.
- Write a brief summary of a meeting or outcome for a team or manager.

5. Sample Behaviorally-Based Item Using a Customized, Multiple-Choice Rating Scale

(For the content area: Oral Communication)

Instructions: Indicate the extent to which you have communicated orally with various levels of employees to obtain and provide information.

- A. I have had no experience in performing this task.
- B. I have communicated orally with others to obtain or verify information or to provide routine information.
- C. I have communicated orally with supervisors, managers, or office personnel to notify them of decisions, problems, or further actions needed, or to explain the organization's programs or services.
- D. I have given short oral presentations at departmental/organizational briefings and meetings to convey information on program activities or to describe the impact of new organizational policies on operational responsibilities.
- E. I have led briefings or taught courses on highly technical or complex material to audiences such as high-level managers, attorneys, or executives.

6. Sample Task Frequency-Based Item Using a Customized, Multiple-Choice Rating Scale

(For the content area: Software Development)

Instructions: Indicate the frequency with which you have tested new or modified computer applications, or off-the-shelf software products or software already in use in other locations over the last year.

- A. One or more times a day
- B. One to four times a week
- C. One to three times a month
- D. One to eleven times a year
- E. I have not engaged in this activity over the past year