

# **JOB DESCRIPTION TOOLKIT**

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## OVERVIEW OF THE TOOLKIT

The job description toolkit consists of two parts:

1. A workbook follows which describes how to research and write a job description and includes tools to use.
2. A job bank which provides examples of job descriptions from various museums in Canada.

The toolkit was developed in response to requests from museums for information on the mechanics of developing job descriptions as well as examples of actual job descriptions used by museums.

### **The Workbook**

The workbook provides:

- information on what is required in job descriptions, and
- leads you through the research and writing of job descriptions by asking a series of questions to help you focus and refine the information required for a job description.

It is suggested that you do a quick review of the workbook before you start your research so you can get an overview of what is included and the type of information you may need to seek out.

The workbook also includes this symbol  → which points you to where you need to answer questions. When you have completed, you can place a ✓ in the box.

### **The Job Bank**

Through The Learning Coalition, museums in four provinces (Nova Scotia, Ontario, Saskatchewan and Alberta) have provided examples of job descriptions currently in use. The purpose is to provide you with suggestions on the types of information to include in specific positions as well as formats for job descriptions.

The job descriptions are grouped as follows:

- Operations (management, communications, finances, and support positions)
- Collections Management
- Conservation
- Curatorial
- Education
- Exhibits

## WHY HAVE JOB DESCRIPTIONS?

Job descriptions are the **starting point** in any museum for defining what work is needed and how work will be done. A well researched and written job description fills multiple purposes including:

***Selection*** Job descriptions are used when developing interview questions and selection criteria to determine if the applicant has the qualifications required for the position.

***Total Compensation*** How the job is defined and described will determine the relative value of the job compared to other jobs in the museum. The job description will be the primary document used to determine compensation for the position.

***Performance Appraisals*** The job description is the detailed and objective document that allows both the supervisor and the staff person to have a **shared** understanding of the job. The job description should provide the information necessary to establish concrete performance standards for any performance review.

In the unfortunate situation that you must terminate an employee because of poor performance, the job description will be a key document for establishing the scope and expectations for the job.

***Career Planning*** Job descriptions provide a complete picture of all jobs in the museum, the relationships between jobs, and the skills/knowledge required. Individual staff and their supervisors can then identify and plan future career opportunities.

***Training*** By describing the qualifications and the performance standards required, job descriptions also are a tool to identify the type of training required to achieve the performance required.

The job description is primarily a **communication tool** – it states what the job is and how it should be done. Job descriptions need to:

- ❖ be written clearly,
- ❖ focussed on the core tasks to be done, and
- ❖ reviewed regularly to remain current and relevant.

## GETTING STARTED

There are two steps in preparing and writing a job description:

1. Researching the job and
2. Writing the job description.

### *Researching the Job*

Researching the job seeks to answer the following four questions

<p><b>1. WHY the employee does the job?</b></p> <ul style="list-style-type: none"><li>• The benefits received from the programs and services delivered by the employee to target audiences.</li><li>• How the position supports the museum's direction?</li></ul>	<p><b>2. WHAT will the employee do?</b></p> <ul style="list-style-type: none"><li>• The specific tasks and duties of the position.</li><li>• What will be the results from the tasks and duties?</li></ul>
<p><b>3. HOW will the employee do the job?</b></p> <ul style="list-style-type: none"><li>• The tools, techniques and methods to accomplish the work.</li></ul>	<p><b>4. WHAT are the required qualifications to do the job?</b></p> <ul style="list-style-type: none"><li>• The skills, knowledge, abilities and physical demands of the job.</li></ul>

A common misunderstanding is that the person filling the position will ultimately define the work of that position and how it will be done, particularly if the position is a senior position being filled by a professional. Consequently the museum, through its managers/supervisors, do not have to spend much time in detailing what the position will do, but rather just provide a general description. This approach might work, but it gives a lot of responsibility to a new staff person.

More importantly however, the museum cannot be assured that the work of the position will align with the needs of the museum. Over time, any individual will put their own 'stamp' on his/her work in the position, but it should always be within the framework of the work needed by the museum. Without such controls there is the potential that your museum may have placed itself in a compromising position – the individual employee may be doing a **good** job, but doing the **wrong** job.

If there are problems with the individual hired and the job description is unclear or vague on the position duties, responsibilities and expectations,

it may be hard for your museum to justify disciplinary action and/or dismissal.

As well, if the individual hired has some clear skill/ knowledge deficiencies, which were not identified during the interview process because the job description was vague, it is the museum's responsibility to address the deficiencies.

Once you enter into an employment contract with an individual, unless the individual has deliberately misrepresented him/herself, your museum is responsible for ensuring that the individual has every reasonable opportunity for success in the position.

As a rule, if you, as the supervisor or manager, cannot clearly articulate what the job is and the expectation of performance for the position – it is unrealistic to expect the staff person in the position to do so.

Researching the job involves conducting an analysis of what the position involves so that decisions can be made on what are the core elements to include and to develop a clear and concise focus. This will guide the employee in performing the job as well as the supervisor in evaluating how the employee is performing.

Getting information on a position can come from various sources including:

- Your own experience with the museum and its current job,
- Other staff who have done the job previously or work in close contact with the job,
- If this is an existing position which is either being revised or re-staffed, involve staff who have done the work
- Review job descriptions from other museums (accessed through the Job Description Bank).

Once you have completed your research, use *Summary Template for Position* (on page 25) to compile and summarize your research findings in one place.

Complete the following steps to compile the research for your job description.

## 1. WHY the Employee Does the Job?

(Box 1 on Summary Template for Position on page 25)

When answering this question, look at the position from the following perspectives:



### 1. The Museum as an Organization:

- In the next 2 to 5 years, what does the museum plan to do?
- How does the work of this position contribute to those plans/directions?



### 2. The job:

- How does the job 'fit' with other jobs in the museum? For example if your museum does not have a Researcher position, this function may need to be included in curatorial and/or collections management job descriptions
- What is the future of the job – is it expected to change over the next couple of years? If so, how will that affect the person hired into the position?
- Are there limitations to the job's future – such as funding, a collective agreement?



### 3. Who benefits from the work of the position?

- **Who** does this position have to relate to – such as museum visitors, volunteers, other staff, members of the community, other organizations, Board members, funding agencies, etc.?
- In what **ways** does the position relate to others – such as giving/receiving information, submitting reports/research, presentations, etc? Include both internal and external contacts that the position needs to have contact.
- **How often** and **how important** are these relationships to the work of the position and to the museum. Describe the consequences if the relationships are not maintained.

## 2. WHAT will the Employee Do?

(Box 2 on Summary Template for Position on page 25)

At this point in developing a job description, it is better to *over-describe* the job. From this, the core tasks and responsibilities can then be selected. The list of core tasks and duties will contribute to how the performance expectations will be identified as well as the qualifications required to do the work.



1. Identify all of the duties and tasks of the position:
  - Think in terms of “What does a year in the life of this job look like?” The following questions should help you answer that question.
  - Remember to review your answers to **WHY the Employee Does the Job?**
- i. What tasks are routine (usually performed everyday)?
- ii. What tasks/duties need to be done occasionally or seasonally, such as monthly or every couple of months (for example, writing report summaries for board meetings)?

iii. What tasks/duties need to be done annually?

iv. Identify the level of authority and/or responsibility required to perform the duties and tasks – for example will the position *initiate and develop* new programs and services or will the position *implement* existing programs and services?

v. How much of the work is done independently – how much as part of a team? Be specific, while teamwork is generally considered an essential qualification of any employee, the amount of teamwork required for each position will vary.

vi. What types of decisions can be made by the position – such as spending authorization, programming directions, hiring of other staff, etc.? For example, making decisions about allocating budget or staff resources is a task/duty that should be included in the analysis.

### ***Identify Core Duties and Responsibilities***

At this point, the research conducted will provide far more information than can be included in a job description that will be clear and concise. Identify those duties, responsibilities, and relationships that are essential for the position.

While the following suggestions for defining core duties and responsibilities may seem obvious, they are useful when finalizing core duties and responsibilities:

- The position exists to perform the duties/tasks (e.g. if your museum hires someone to lead group tours then this duty is essential since this is the reason the position exists),
- There are a limited number of other staff available to perform the duty (e.g. it may be an core function for an administrative assistant to answer the telephone if there is only one other staff person in a busy office),
- The duty/responsibility is highly specialized (e.g. a new conservation lab may require someone who will perform not only conservation tasks, such as treatments, but also to manage the conservation lab; or a critical exhibit development may need additional research positions specific to the content of the exhibit).
- Remember to consider if this is a full-time or part-time position and consider what can be accomplished within the work time available.

While each job will be different, it is likely that between 6 to 10 primary duties/responsibilities will be identified as essential to the work of the position. These will form the foundation for the job description.



What are the core duties and tasks for the position (it is not necessary at this point to list in priority)?

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

### ***Identify Performance Expectations***

As the core work of the position is defined (the tasks and duties of the position), begin to identify the performance expectations for the work. Expectations could be defined by:

- time (e.g. publishing a bi-monthly newsletter),
- relationships (e.g. developing and maintaining an advisory committee),
- products (e.g. producing an exhibition catalogue),
- services (e.g. providing event information to the media),
- revenue (e.g. generating a specific amount through admissions, sales, fundraising, donations, grants, etc.),

If you fail to define performance expectations, it will be difficult, if not impossible, to assess the employee's performance.



Some questions that you might ask:

1. What would the product or service that the position provides look like? *(for example an annual speakers series for youth to encourage their participation in wildlife preservation)*



2. How would the target audience ***benefit*** from receiving the product or service? *(for example, by participating in the teacher in-service program, Grade Four teachers will use new resources in their classrooms.)*



3. What would a high standard of performance look like compared to a poor or adequate expectation of performance?

**For example – Collections Manager**

<b>Task/Responsibility</b>	<b>Expectation A</b>	<b>Expectation B</b>
Maintains the museum's collection.	Manages the storage of museum's collection.	Planning for storage facilities so that the museum's collection is housed in conditions that ensure access to the collection and its long-term preservation.

Both expectations are fine, however Expectation B is a stronger measure of performance because it both identifies **what** the manager should **do** (planning storage facilities for the museum's collection) and identifies the **result** (long-term preservation and access).

The size of the museum and its available resources (both funds and staff/volunteers) should not affect performance expectations. Performance expectations will be accomplished within the context of the museum's resources and should always be the highest attainable relative to your museum's resources.

The key elements in writing a performance expectation are:

1. What will the position do **and**
2. What will be the result of doing the work of the position (benefit to a target audience, museum, clients, volunteers, community, etc.)?



For each **core** task/duty identified on page 11, **write at least** one performance expectation. If possible combine the core task/duty with the performance expectation in one statement.

Core Tasks/Duties (from page 11)	Performance Expectation
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

***Other Tasks and Duties and Performance Expectations***

Remember also to identify tasks/duties, along with performance expectations, required for the position which may be more generic, but still essential, such as:

- Communication (oral, writing and reading)
- Math skills
- Teamwork
- Planning/organizing
- Problem solving

These tasks/duties and performance expectations will vary for each position. For example, tasks and expectations for planning/organizing will be higher for a manager's position than for a support staff position. Similarly tasks/expectations for math skills will be higher for a position responsible for museum admissions than for a tour guide.

→ What are other tasks/duties and performance expectations for this positions that have not been identified previously?

	<b>Tasks/Duties</b>	<b>Performance Expectations</b>
1		
2		
3		
4		
5		

### 3. HOW will the Employee do the Job?

(Box 3 on Summary Template for Position on page 25)

This is the part of a job description that often gets overlooked. HOW a job will be done can be of critical importance to how an individual employee perceives his/her work in the museum. Most often the questions pertain to using specific tools/equipment, but may also include specific approaches or methods – such as a specific approach your museum uses to develop exhibits or deliver education programs.



1. What are the specific tools and equipment that the employee must use to accomplish the work of the position?

- Remember to include any software that the position is required to use and indicate the level of proficiency (for example, do they need to be an expert in database applications because they will develop them or do they just need to know how to get into the database to book a meeting space?)



2. Are there any methods or approaches specific to your museum's operation that the position must follow?

- Such as using traditional care approaches for First Nations and Metis collections, or using specific interpretative approaches in developing public programs.



3. Are there specific working conditions that the position is subject to?

- Is it critical that the individual be able to drive, or be away from home for lengths of time (such as overnight, 2 days, 1 week, etc.)?
- Will some of the work be done out of doors and during which seasons?
- Does the position require any physical labour such as lifting equipment?

After completing the WHY the Employee Does the Job, WHAT will the Employee Do and HOW will the Employee do the Job, you will have enough information to decide is the position will be full-time or part-time. This decision will be influenced by available funding. But there must be congruency with the amount of work the position must do with the amount of time allocated to the position.

#### **4. WHAT are the Required Qualifications to Do the Job?**

(Box 4 on Summary Template for Position on page 25)

Once the job duties and responsibilities are identified, and how the job will be done, identify the type of experience, training and/or education required to be effective in the position. Qualifications can come in a variety of formats including:

- Specific educational qualifications (degree, diploma etc.)
- Competencies (skills, knowledge, attitudes)
- Certifications/accreditation
- Legislative requirements

#### **ALERT**

Qualifications identified for a position are often much more than required for the actual work of the position. There is always the temptation to specify more and higher qualifications in order to get the 'best' person for the job. There are positives and negatives to this approach.

#### **Positives:**

- The museum's staffing needs will change over time – the museum may take on new projects or new directions requiring different skills and abilities in staff. If your museum has highly qualified and experienced employees it may be easier for them to assume new projects or directions.
- It benefits the museum to offer employees long-term employment which may include employment in other positions. In general, employees with more qualifications along with a broad range of experiences are likely to adapt to new work or new positions quickly.

#### **Negatives:**

- Highly qualified employees may become bored with the necessary, but often mundane, duties/tasks of their existing position – employees who are bored or unmotivated by their current positions do not benefit the museum.
- If the museum cannot provide highly qualified employees with long-term career advancement opportunities, they may not stay, and the museum may incur on-going recruitment expenses to replace employees who move onto other employment within one or two years.

If your museum cannot offer long-term career advancement, consider providing temporary re-assignments or allowing the staff person to incorporate specific interests into their position (as long as it supports the long term plan of the museum) so that staff can

re-energize their work perspective. These approaches are often called job enlarging, enrichment and/or rotation.

Seeking individuals with high qualifications implies that the museum is seeking high standards of performance and also indicates, to its community and stakeholders, that its employees are credible and experienced. However, recruiting individuals with high qualifications may be difficult for museums if they cannot compensate them accordingly.

There is a fine balance between identifying the minimum qualifications for a position and identifying the highest qualifications required.

### ***Educational Qualifications***

These are the more commonly cited qualifications and usually are a specific degree/diploma from an accredited academic institution, such as:

- Certificate in Cultural Resource Management (University of Victoria)
- Certificate in Arts and Cultural Management (Grant McEwan College)
- Certificate in Heritage Studies (University College of Cape Breton)
- Masters in Museum Studies (University of Toronto)
- Diploma in Applied Museum Studies (Algonquin College)
- Diploma in Museum Management - Museum Management and Curatorship program; Collections Conservation and Management program (Sir Standford Fleming College)

Depending on the position, the educational requirement may also be non-museum specific, such as an undergraduate degree in management (for a Business Manager), or a diploma in office administration (for an Administrative Assistant).

Educational qualification may also be derived from non-academic institutions such as the various Certificates in Museum Studies offered through provincial museum associations.

### ***Competencies or Educational Qualifications?***

Increasingly job descriptions are using behavioural competencies to describe qualifications rather than educational qualifications (such as a specific degree, diploma, etc). This recognizes that individuals often have skills and experiences that are useful to a museum (or any workplace), but they did not obtain them through a systematic program of study at a college or university. Competencies recognize learning on

the job, learning through life experience, and self-directed learning adults undertake because of an interest in a subject.

Competencies may be particularly important in positions that reflect work being done by the museum in cultural communities, such as First Nations or Metis, where specific educational qualifications may not be appropriate or even available. For example, if your museum is seeking a curator responsible for a major collection of First Nations objects, some of the competencies that will be important would include an understanding of traditional care practices, or to how to access or work with elders in First Nations communities.

In general, it is *easier* to state educational qualifications (such as a diploma in museum studies, or a degree in fine arts, specializing in art history) than to define competencies. Defining competencies that are accurate measurements of an individual applicant's abilities and skills is a skill in itself. For museums that do not have specialized human resource staff, defining competencies can be time consuming and may not necessarily provide your museum with any useful information to aid in recruiting or selecting qualified individuals.<sup>1</sup>

A more manageable approach may be to:

1. Define the ideal educational qualification,
2. From the educational qualification defined, draw specific examples of behaviour (skills/knowledge/attitudes demonstrated by specific actions/behaviour) that relate to the position, and
3. Include both the educational qualification and the specific behaviours.

Using this approach, an applicant may have a combination of educational qualifications (which may not be specifically what is required), but combined with identified competencies, the qualifications are met.

**For example:**

The qualifications for position responsible for creating and designing print and internet communication for a museum could be:

1. Two year diploma from an accredited college in multi-media studies, **or**
2. Submit a description of work the individual has completed that demonstrates:
  - How you work with staff and volunteers to identify information for website and print content media,

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<sup>1</sup> Refer the to the Reference section of the Toolkit for resources in the cultural sector that have defined competencies.

- Website design capabilities including a description of the websites for which you had sole or major responsibility (provide links), and
- Examples of print material where you have had sole or major responsibility for developing and producing.

### ***Certification/Accreditation***

While museums are not yet at the stage of licensing museum occupations, for some positions there may be specific certifications that are beneficial, such as Fire Arms Certification or First Aid/CPR. Other certifications/accreditation may also be beneficial for some positions such as those involved in financial administration, fundraising, human resource management, or communications (such as Certified Accountant, Certified General Accountant, Certified Management Accountant, Accredited Business Communicator, Certified Fundraising Executive, Certified Human Resource Professional).

Such designations are granted usually through a combination of exams and experience in the field and are assessed through a professional association. Usually there is also a professional code of conduct/ethics to adhere to. Such accreditation/certification is an indication that the individual is committed to providing a high standard of service in his/her area of expertise.

### ***Equity Positions***

Some positions in museums may be designated for individuals from specific equity groups (typical gender, disability, visible minority and/or aboriginal). This is an important direction for the museum so that the museum reflects its community.

While a primary consideration is whether the applicant meets the equity requirement, other qualifications/education also needs to be considered. It is rare, unless the position is designated a training or intern position, that the job will not require some other qualifications. Competencies are often used to define the qualifications for equity positions, because in many cases, applicants will have non-traditional experience and/or international education, which will limit your museum's ability to identify specific educational qualifications.

### ***Other Qualifications Required***

1. It is an unfortunate, but necessary, development in employment to consider the need for criminal record checks<sup>2</sup>. It is the responsibility of the museum, as an employer, to ensure that due diligence is observed in any employment situation. If the museum does not maintain due diligence, it may be held responsible for damages to property or harm to people. Criminal record checks should be considered for certain jobs in museums. For example, positions:

- entrusted with the care of vulnerable clients (*programming staff who work directly with children/seniors in unsupervised situations or off-site of the museum*);
- with responsibility for public money (*financial officers, gift shop staff*),
- with access to modify information technology systems,
- working with third-party organizations that require criminal record checks (*programming staff who may be working in a partnership agreement with schools, day cares or senior centres*);
- involved in directly providing security; or
- with other special circumstances, on a case-by-case basis (*such as staff who may have unrestricted access to museum collections*).

2. Some positions may require certifications pertaining to Occupational Health and Safety, such as First Aid/CPR. While not all employees may need such training, you may find that at least one employee per shift, or during hours when staff/volunteers are at the museum, has such training. Some workplaces require that all individuals who supervise staff have first aid/CPR training.

It is advisable to check with the requirements of your provinces' Occupational Health and Safety office to determine what is the minimum required.

3. If your museum offers food/beverages as part of its public services, positions which are responsible for handling any food and/or beverages may require a basic food handling course. It is best to check with the public health department regarding any specific requirements.

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<sup>2</sup> If newly created positions are required to have criminal record checks, existing positions should be reviewed to determine if criminal record checks should be conducted on the incumbent. Overall a Human Resource Policy should be developed to guide which positions should have criminal record checks and how such a policy should be implemented.



On page 25, a *Summary Template for Position* is provided. Use this sheet to combine all the relevant work you created from the Job Description Toolkit.

Completing the summary template is a useful opportunity for you to 'step back' and look at your research to date. In particular look for:

- Any obvious gaps (such as core tasks that relate to why the position exists).
- Incongruence between core tasks and the qualifications for the position (such as qualifications too high for the type and scope of work).
- There are too many core tasks particularly when combined with the performance expectations – the scope of the work is too large for one person to accomplish within the amount of time allocated for the position.
- The performance expectations are too high (or too low) given other positions in the museum. You may also find that other positions in the museum may need to be reviewed and re-defined.

### **Reminder**

It is important to keep your initial work. Once you have recruited an individual for the position and are beginning to provide them with an orientation to the job, some of this information may be helpful in discussing the position further with the new employee.

**Summary Template for Position**

**Box 1**  
**WHY the Employee Does the Job?**

**Box 2**  
**WHAT will the Employee Do?**

**Box 3**  
**HOW will the Employee do the Job?**

**Box 4**  
**WHAT are the Required Qualifications  
to do the Job?**

## ***Writing the Job Description***

The purpose in writing the job description is to:

1. Take the information you collected from your research,
2. Prepare clear and concise statements of the work to be performed,
3. Format into a standard form, and
4. Use it for recruitment, selection and assessing performance.

You will likely need to write several drafts of the job description to ensure that you are being concise and clear. It will be helpful if others, who are not familiar with the job, read the description to ensure clarity and understanding.

A job description template is available on page 30.

## **Elements of a Job Description**

There is no perfect job description form; typically most job descriptions will have the following elements:

1. Job Title
2. Purpose of the Job
3. General Summary of the Job
4. Core Tasks and Duties
5. Performance Expectations
6. Who the position interacts with (clients, members, other staff, stakeholders etc.) and in what ways
7. Qualifications
8. Description of the Working Conditions
9. How/who Supervise the Position
10. Salary and benefits
11. Date of approval of the job description (including dates/approvals of any subsequent revisions to the description)

Information to consider when writing the job description should include:

### ***Job Title***

Job titles should be descriptive of both the nature and level of the work performed. Also consider other job titles in the museum – there should be consistency, particularly for those positions that have the same or similar salary range as well as a similar level of responsibility. If the job is titled supervisor or manager, the assumption is that the position plans and decides on directions, has some budget control and oversees the work of other employees. However if the position is titled coordinator then the implication is that the position is primarily responsible for coordinating existing programs and services usually under the direction of another position.

Do not overstate the importance of the work performed in the job title – this often happens to make the individual filling the position feel better.

It should go without saying, (but let it be said) that the job title should be gender neutral.

### ***Purpose of the Job***

State how the position supports the direction that the museum is going (*WHY does the Employee do the Job* Box 1 on the summary sheet). The purpose of the job should be contained in no more than two or three sentences which might describe the museum in general and how the job supports the work of the museum.

### ***General Summary of the Job***

Provide a paragraph (or two at the maximum) that provides an overview of the position – its main duties and results expected. This should provide anyone reading the summary with a good understanding of the job and what is expected from the position.

Sometimes this element of the job description is easier to write after completing the other elements.

### ***Core Tasks and Duties and Performance Expectations and Results***

These two elements could go together or be separate depending on the information you collected when researching the position and how you described the research in the previous section.

However, these two elements are the ‘meat’ of the job description. Future decisions resulting from performance reviews and/or compensation levels will be based on the tasks/duties and the performance expectations of the position.

Your **first step** is to prioritize the core tasks and duties – usually priorities are established by how important the task is to the museum. It might be expressed in terms of the amount of time estimated that the position is expected to devote to the task or the impact the task has on the museum achieving its goals or directions. Some job descriptions will allocate a specific % of time which typically would be spent on the task – however, that is usually for positions which have a lot of routine tasks. For senior positions in the museum it is more useful to prioritize tasks by the impact of the work on the museum.

Your **second step** is to write clear and accurate statements that describe the work of the position. Ensure that an **action verb** is included – preferably at the beginning of the statement.

For example, for a senior management position with a civic museum:

*Negotiates the museum's annual budget with City of XXXX so that the museum can recruit and retain qualified individuals for its core positions*

Negotiates is a very strong action verb that is appropriate for a senior level position – however only use it if it is appropriate to the tasks/duties of the position.

If the position does not negotiate but rather manages the annual budget, a more appropriate statement may be:

*Plans staff recruitment and retention programs to ensure that the museum's annual budget allocation through the City of XXX maintains the museum's core positions.*

Plan is still a strong action verb, but is more reflective of the actual work of the position. A list of action verbs can be found on page 40.

It is also advisable to include in the tasks/duties a statement that other tasks/duties may be assigned by the position's supervisor in order to accomplish the work needed by the museum.

#### ***Who the position interacts with and in what ways***

This element should describe the primary individuals/organizations (internal and external to the museum) with whom the position relates to, for what purpose, and why it is important to the museum. This information will be found in your research on ***Why the Employee Does the Job?*** section.

This element can probably be covered in two or three sentences and should contain the most important relationships – these relationships should be reflected in the Core Tasks and Duties.

#### ***Qualifications***

In the section, **What are the Required Qualifications to do the Job?** you will already have identified a set of qualifications. Include those qualifications that are an **absolute must have** as well as those that are **beneficial to have**.

#### ***Description of the Working Conditions***

This element should give an indication of the physical environment in which the work is performed. This may be more important for some positions than for others. For example for an interpreter/tour guide position at a nature centre which is open year round, the working condition will likely involve some degree of being outside, in both hot and cold conditions – this should be noted.

Other typical working conditions that should be stated, and which may influence an individual's decision to apply for the job, are:

- Work required on weekends/evenings/holidays
- Need for overtime
- Travel requirements
- Working in another location (such as an off-site collections storage area)

### ***How/who Supervises the Position***

This element should provide who (state the position, not the individual in the position), this position is supervised by as well as some indication if the supervision is daily, weekly, or monthly contact or direction. Also note if the position reports to more than one individual, and how that relationship will be managed.

As well, if the museum is working under a collective agreement, indicate if the position is in-scope or out of scope.

### ***Salary and benefits***

If your museum has established salary ranges for positions, indicate which salary range applies to this position. If not, state at least the starting salary for the position. Indicate any specific benefits that apply to this position, such as a pension, health/medical coverage, etc.

### ***Date of approval of the job description***

Indicate the date the job description was approved – if this is a revision to an existing position, indicate both when the job description was initially approved as well as the date of any revisions which have been approved.

Use the *Job Description Template* (page 30) where you can begin to draft your final job description.

### ***Final Approval***

Depending on how your museum is structured you may need to get final approval of the job description from your governing authority or supervisor.

If your museum is associated with an organization (such as town council or municipality), once you have completed a draft of the job description, you will need to have it reviewed by the appropriate authority (such as the Human Resources department) for final approval. The work that you did to identify tasks, duties, performance expectations will help explain and justify how you have described the job. If the position is part of a collective agreement, the union will also need to 'sign off' on the position. Some revisions may be required to remain consistent with other jobs in the organization and/or union.

## **Job Description Template**

Job Title:

Purpose of the Job:

General Summary of the Job:

Core Tasks and Duties/Performance Expectations:

Who the position interacts with and in what ways:

Qualifications:

Description of the Working Conditions:

How/who Supervises the Position:

Salary and benefits:

Date of approval of the job description:

## USING THE JOB DESCRIPTION

Once you have completed the job description it is now time to use it. As discussed on page 2, there are a number of uses for a job description:

### ***Recruitment***

The job description provides the basis for promoting and advertising the position, however not all of the information contained in a job description will be needed in advertising the position. Include the following:

- Job Title
- Purpose of the Job
- General Summary of the Job (include core tasks/duties)
- Qualifications
- Salary and benefits

If working conditions are an important and essential part of the position, provide a summary of them.

Be sure to include a notice that a complete job description is available upon request.

The purpose of the recruitment is to get as many qualified individuals to apply for the position as possible – the extent of your recruitment efforts will be limited by your museum’s budget. However, by providing information on the sections noted, prospective applicants should have enough information to determine if the position is of interest to them and that they should investigate the job further.

Postings/advertising of positions is usually done through newspapers or other relevant media such as museum related print publications/newsletters. In these situations, space is at a premium and can be costly so the entire job description is not included. However with the increasing use of the internet by job seekers, it is now possible to include the entire job description as space is less of an issue.

### ***Selection***

From the job description, you should be able to draw up a set of selection criteria. Criteria may be in two parts – initial sort and selected for interview. The initial sort criteria will likely include the most important qualifications for the job – for example if you have decided that the individual in the position must have at least a two year diploma in museum studies from an accredited educational institution, then all of those applicants without that qualification will not make it through the initial sort. This may seem harsh, but you want to spend your time reviewing, in detail, those applications that have the best chance for an interview. If you have 35 applications, without the initial sort criteria

you will spend a lot of unnecessary time reviewing applicants that will not lead to an interview.

The second set of criteria will apply to only those applications that made it through the initial sort. The second set of criteria will be more extensive and will examine how the applicant's combination of work history, experience, and education 'fits' with the core tasks, duties and performance expectations of the position. With the second set of criteria, it is likely that 4 to 5 applicants will be selected for interviews.

### ***Developing Interview Questions***

Interview questions should relate directly to the job description and are used to both confirm information in the application as well as allow the applicant to expand on their experience and qualifications. This is where a good description of performance expectations and core tasks/duties will help in generating interview questions.

#### **Examples:**

If your museum is recruiting an individual for Manager of a museum store, and you have determined that the store must generate a specific amount of profit each year (performance expectation), then a series of interview questions should be developed to determine the individual's experience in achieving such an expectation.

If your museum is recruiting for a Collections Manager who will have a major responsibility for developing a new storage facility, interview questions should center on that task and the applicant's experience in doing that type of work.

### ***Compensation***

There are two aspects to compensation:

1. Comparable positions within a museum are compensated similarly and
2. All of the museum's positions are competitive with other museums of a similar size and within a geographic area.

Ideally, positions in an organization that have comparable task/duties, performance expectations, and qualifications should be compensated similarly. When you develop a job description for a new position, you will need to determine how the position fits with existing jobs and salaries within your museum, commonly referred to as classification.

Try not to create too many different classifications – in most museums with under 10 staff, four classifications of jobs are sufficient:

- Executive Director (the senior position reporting directly to the Board)

- Manager (depending on the scope of the Executive Director’s job, there may be only one or two managers, if any. These positions typically develop programs/services and oversee other staff in implementing the programs/services.)
- Coordinator (positions who are responsible for implementing programs/services)
- Support Staff (provide help or assistance to other positions)

A special case classification could be for summer students – in these situations there are usually other factors determining compensation such as return to school, specific age range, etc.

As well as ensuring that there is internal consistency in compensation for positions, the museum should also review how their existing salaries and benefits (total compensation) compares to that of other museums of the same size and scope and within a specific geographic area. This is more difficult since available data on compensation may not be readily available.

At least every three to five years, museums should review all of their job descriptions to ensure that both the description of work and the compensation for the position are current and reflect any new strategic directions or plans the museum is undertaking.

### ***Performance Appraisals***

Conducting a performance appraisal needs to be done within the context of the job description. While each position will have an annual workplan developed in conjunction with the position’s supervisor, the job description should always guide the overall work of the position. From year to year, some tasks/duties may become more or less important, but the basis for performance is always the formal job description.

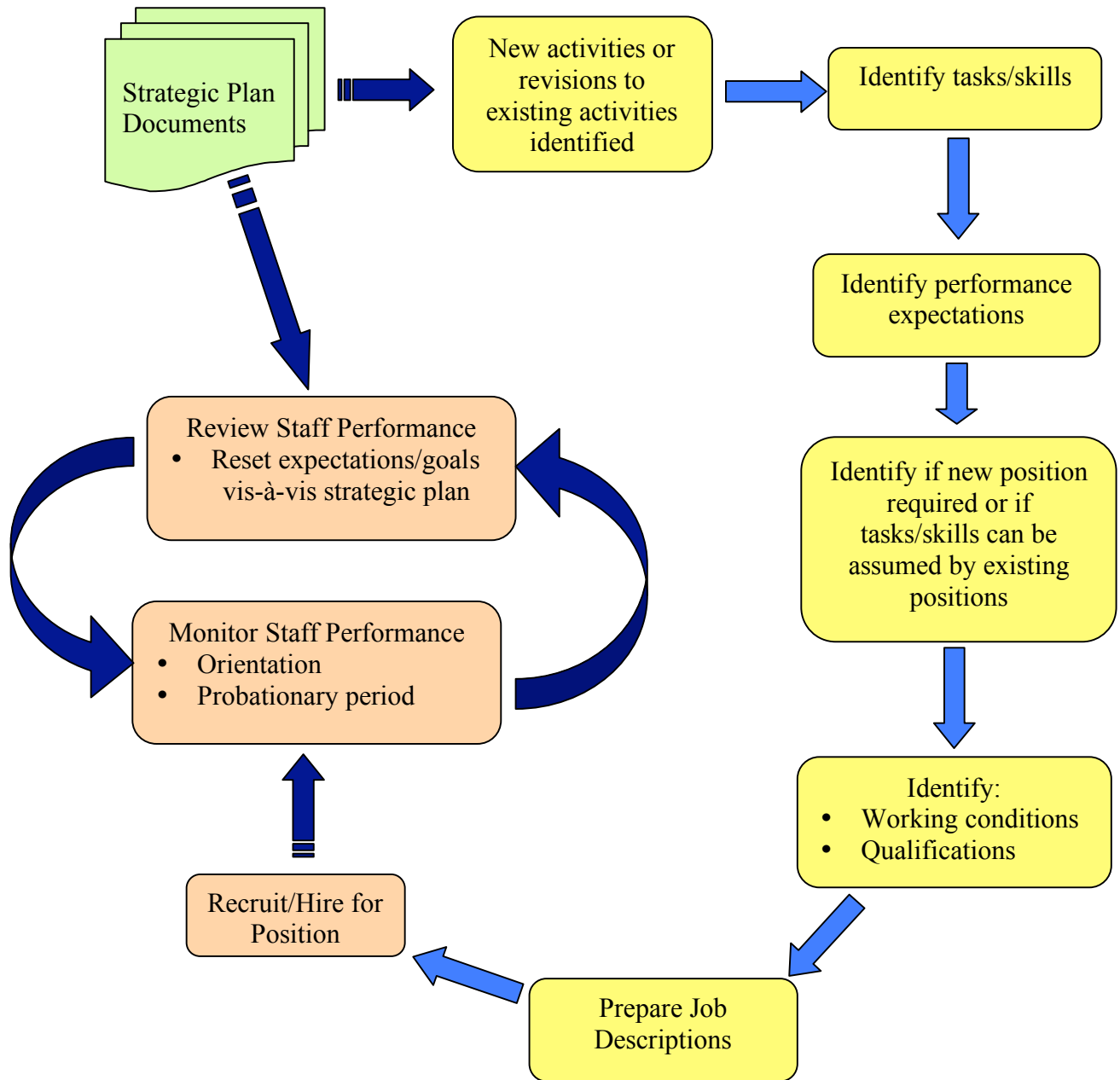
### ***Training***

In the ideal world, employees will have all the qualifications required in the job description. It is more likely that the museum will need to provide some type of training at some point. If performance expectations for the position are clearly stated, and performance appraisals are conducted, identifying any required training will be easier.

### ***Developing a Career Plan***

If all positions in a museum have job descriptions, individuals should have a clear idea of what positions may be available in the future and, more importantly, what is required for success in other positions. This has benefits not only to individuals, but also to the museum as an organization since the museum will be able to develop a human resource plan and also begin to initiate succession planning.

## OVERVIEW OF THE PROCESS



## REFERENCES

### **Describing Competencies**

Work has been done in the cultural sector which describes competencies – some of the sources useful in defining competencies include:

#### **Cultural Human Resources Council**

Archivist; Conservator; Curator; Exhibit Designer; and Heritage Interpreter: <http://www.cultureworks.ca/compendium/default-e.asp>

#### **National Parks Service, US Department of the Interior**

Competencies for Museum Management:

<http://www.nps.gov/training/npsonly/RSC/musmngt.htm>

**The Workforce of the Future: Competencies for the Canadian Museum Community** (Canadian Museums Human Resource Planning Committee, July 1997)

**Recruiting and Hiring Museum Curators and Directors: A Human Resource Tool for Local Governments** (Ontario Museum Association, 2003). Available from Ontario Museum Association

<http://www.museumsontario.com/publications/books.shtml>

### **Museum Studies Courses**

The Canadian Museums Association website provides a comprehensive list of links to museum studies programs in Canada. The links provide a useful resource of the type of skills/knowledge graduates of such programs would process. The link is

[http://www.museums.ca/en/jobs/museum\\_studies/](http://www.museums.ca/en/jobs/museum_studies/)

### **Compensation**

**National Compensation Survey by Canadian Museums Association** (published by Canadian Museums Association, 2001)

**2005 Compensation and Benefits Study of Cultural Workers from SaskCulture Inc. Member Organizations.**

The study reviews compensation and benefits from a variety of cultural organizations in Saskatchewan. Available at

[http://www.saskculture.sk.ca/cultural\\_resources/Comp\\_Ben\\_report.pdf](http://www.saskculture.sk.ca/cultural_resources/Comp_Ben_report.pdf)

## **General Human Resource Information**

### **British Columbia Museum Association**

BCMA received funding from Canadian Heritage under the "Canadian Arts & Heritage Sustainability Program" (CAHSP), to compile and produce a series of "Best Practices Modules" for members to use as online or hardcopy reference material and guidelines for their museums and art galleries. While the series covers a range of museum issues, the following modules are of specific interest to managing staff and volunteers:

- Succession Planning
- Human Resource Management
- Workplace Learning and In-service
- Mentoring Programs

Modules are available on-line at:

<http://www.museumsassn.bc.ca/content/home.asp>

### **Cultural Human Resources Council**

The council offers a variety of print and on-line resources pertaining to human resource management in the culture sector. Resource manuals include the following topics.

- Benefits and Retirement Plans
- Coaching, Mentoring and Succession Planning
- Dealing with Challenge and Conflict
- Termination of Employment
- Job Descriptions
- Managing Employee Performance
- Recruiting the Right People

Manuals are available at

<http://www.cultureworks.ca/hrToolsResources/careerDevelopmentTools-e.asp>

## **GLOSSARY OF TERMS**

The following are common terms used in the human resource field and pertaining to identifying and developing job descriptions.

### ***Accreditation/Certification***

A process of external quality review and certification by a recognized body that evaluates individuals, colleges, universities and educational programs to assure they are performing the functions that they claim to be performing in a competent manner.

### ***Behavioural competency***

The behaviour of the employee which is the subject of measurement and appraisal in terms of whether or not the behaviors shown by an employee are those identified by job analysis/competency profiling as those contributing to team and/or organizational success.

### ***Career path***

The progression of jobs in an organization's specific occupational fields ranked from lowest to highest in the hierarchal structure.

### ***Career planning***

The process of establishing career objectives and determining appropriate educational and developmental programs to further develop the skills required to achieve short- or long-term career objectives.

### ***Competencies***

The knowledge, skills and abilities required to perform a specific task or function.

### ***Core competencies***

The skills, knowledge and abilities which employees must possess in order to successfully perform job functions that are essential to business operations.

### ***Core tasks/duties***

The tasks or functions within an organization considered essential to the organization's day-to-day operations.

### ***Human resource management***

The formal structure within an organization responsible for all the decisions, strategies, factors, principles, operations, practices, functions, activities and methods related to the management of people.

***Human resource planning***

The process of anticipating future staffing needs and ensuring that a sufficient pool of talent possessing the skills and experience needed will be available to meet those needs.

***Interview***

Used during the selection process, an interview is a face-to-face meeting with an individual or group, which involves asking questions to elicit information to determine if an applicant is suitable for a position.

***Job description***

A written description of a job which includes information regarding the general nature of the work to be performed, specific responsibilities and duties, and the employee characteristics required to perform the job.

***Job enlarging***

A method used to keep workers motivated, the process involves adding new tasks which are of the same level of skill and responsibility to a job.

***Job enrichment***

The practice of adding tasks to a job as a means of increasing the amount of employee control or responsibility.

***Job rotation***

The practice of transferring employees for temporary periods of time between varying jobs within an organization; often used as a training and development method.

***Mission/mandate statement***

A statement illustrating what the organization is, what the organization does and where the organization is headed. In the museum field it is often referred to as the 'statement of purpose;.

***Performance appraisal***

A periodic review and evaluation of an individual's job performance.

***Performance management***

The process of maintaining or improving employee job performance through the use of performance assessment tools, coaching and counseling as well as providing continuous feedback.

***Performance expectations***

The tasks, functions or behavioral requirements established by the employer as goals to be accomplished by an employee.

***Recruiting***

The process of finding and hiring new employees – will include such tasks as deciding how and where to look for staff (such as posting job descriptions on websites targeted to specific audiences)

***Selection***

The process of identifying from individual candidates those who will participate in an job interview and then deciding which candidate best meets the job qualifications.

***Staffing***

The function within an organization responsible for recruitment, screening and selection of employees. Oftentimes, this function may also be responsible for other areas of employment, such as orientation, retention, training and termination of staff.

***Strategic planning***

The process of identifying an organization's long-term goals and objectives and then determining the best approach for achieving them.

***Succession planning***

The process of identifying long-range needs and cultivating a supply of internal talent to meet those future needs. Used to anticipate the future needs of the organization and assist in finding, assessing and developing the human resources necessary to the strategy of the organization.

***Total compensation***

The complete pay package awarded employees on an annual basis, including all forms of money, benefits, services and in-kind payments.

***Training and development***

A process dealing primarily with transferring or obtaining knowledge, attitudes and skills needed to carry out a specific activity or task.

## LIST OF ACTION VERBS

<b>Decision Making</b>	<b>Management</b>	<b>Change</b>	<b>External</b>	<b>Auditing</b>	<b>Helping</b>
approve require decide test accept authorize terminate render consider solve	execute approve direct change organize meet establish manage negotiate anticipate evaluate plan adjudicate analyze	modify upgrade create stimulate improve compare design make activate establish	coordinate cooperate represent publicize strengthen	review analyze report conclude change recommend guide assist evaluate compare assemble	assist arrange give guide counsel serve contribute initiate
<b>Supervision</b>	<b>Administration</b>	<b>Communication</b>	<b>Research &amp; Development</b>	<b>Personnel</b>	<b>Planning &amp; Control</b>
adhere assign supervise request exercise participate maintain delegate encourage counsel assess develop report foster define demonstrate meet	purchase requisition reject store ship furnish administer supply procure secure justify engage process insure reclaim receive	write inform declare interpret contact issue testify speak display critique present	identify evaluate determine review analyze research define develop prepare recommend submit propose investigate compile	train select interview promote transfer handle employ appraise recruit screen discharge seek	plan forecast assume allocate schedule control measure progress formulate acquire extend monitor