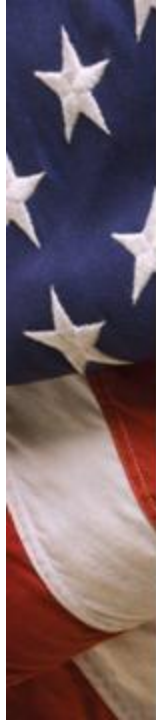




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Write it Right: Examining and Fixing Common Problems with Occupational Questionnaire Items

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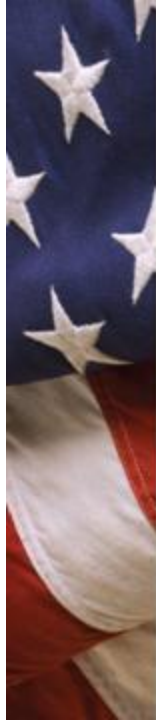
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Good Afternoon. Thank you for joining us for this webinar titled, "Write it Right: Examining and Fixing Common Problems with Occupational Questionnaire Items." My name is Juli and I'm joined by Chelsey and Leigha. We are from the Classification and Assessment Policy group here at OPM.

This webinar is the first in a series of webinars that we will be conducting. We will ask for suggestions of topics you may be interested in at the end of this session so keep your thinking hats on.

Just a little bit of housekeeping before we get started. If you have any questions, please feel free to type it in the "Questions" box at the right of your screen. We will try to answer them in this session. However, if we don't get to it, please send your question to the Assessment_Information@opm.gov and we will respond accordingly.

Just one thing to note: this webinar will not discuss USAJOBS or any staffing systems.



Background

- Changes due to Hiring Reform
- Importance of Occupational Questionnaires

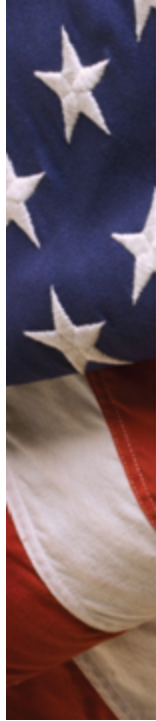


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3

With the changes associated with the Hiring Reform Initiative, applicants can apply for jobs simply using their resume and cover letter. The state of the economy, coupled with the ease of applying, has tremendously increased the number of applications received.

Consequently, the Occupational Questionnaire (OQ) has become more and more important as it is one of the first steps (and sometimes the only step) in selecting your employee. In fact, while reviewing vacancy announcements, we noticed that virtually every announcement required the completion of an OQ. Furthermore, in reviewing existing occupational questionnaires, we realized there were some great things that are being done and some items that could use improvement. Our intent is to provide a framework to help you develop better occupational questionnaire items, or questions. We'll talk through some tips and pitfalls using real-life examples. We are going to make this as interactive as possible by polling the audience and getting your feedback on specific questions.



Formula

- Perform What (**Action verb**) + To Whom or What (**Direct Object**) + To Produce What or Why? How? (**Qualifying Statement**)
 - Example: **Gives presentations** + **on human resources topics (recruitment, benefits, etc.)** + **for new employee orientation**

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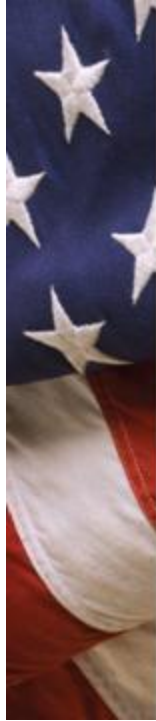
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Here's a general formula that we provide as a backbone in writing OQ items.

Formula: Perform What (Action verb) + To Whom or What (Direct Object) + To Produce What or Why? How? (Qualifying Statement)

Example: Gives presentations + on human resources topics (recruitment, benefits, etc.) + for new employee orientation

Often times, we start with a verb describing what is being performed. Then, we follow that with a direct object to describe that verb, and finally we have a qualifying statement that often provides the purpose. In the example here, "gives presentation" is the verb, "on human resources topics" is the direct object, and "for new employee orientation" is the qualifying statement. We will review this formula in more detail in a few slides.



1. Write it Right

- ✓ Write items in behavioral, observable, and verifiable terms

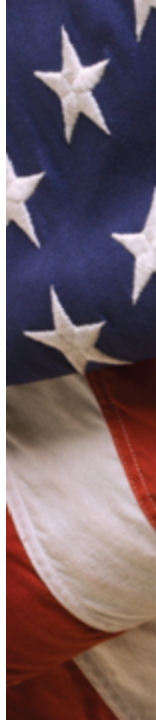


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5

Write items in behavioral, observable, and verifiable terms.

The first thing we noticed is that a lot of items were not written in a way where they could be easily verified. While there are multiple ways to verify the applicant's answers on an OQ, one of the most common ways is simply by reviewing the applicant's resume. This is possible when the OQ items are written in such a way that they can be verified by statements on their resume. In other words, it's unlikely that you'll be able to detect any soft skills (e.g., interpersonal skills) on their resume, so it doesn't make much sense to ask questions regarding interpersonal skills on the OQ. We want the OQ to focus on concrete statements that are observable.



Knowledge Check

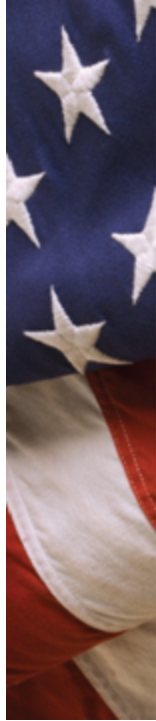
- ✓ Which question can be verified on the applicant's resume?
- 1. Develops technical training for managers regarding their employee relations roles and responsibilities.
- 2. Applies independent judgment during times when specific and detailed instructions were not provided.

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5

Now it's your turn! This is our first audience poll. Which of those two occupational questionnaire items can be verified on the applicant's resume?

1. Develops technical training for managers regarding their employee relations roles and responsibilities.
2. Applies independent judgment during times when specific and detailed instructions were not provided.



Fixed Example

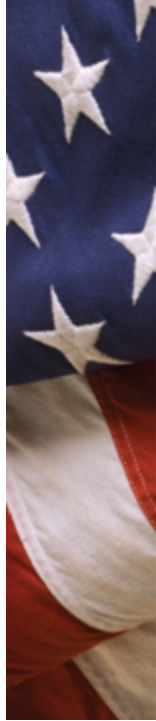
Original: Applies independent judgment during times when specific and detailed instructions were not provided.

Fixed: Classifies positions for which OPM has issued no classification standards.

– Notice the change allows this item to be verified

If you selected the first option ("Develops technical training for managers regarding their employee relations roles and responsibilities."), you are correct; applicants will often include any training they have developed as a bullet on their resume.

With regards to the second statement, "Applies independent judgment during times when specific and detailed instructions were not provided," it's difficult to tell what is meant by "independent judgment." It certainly leaves room for interpretation on the part of the applicant and it is difficult to verify. If we were looking at the applicant's resume, we wouldn't necessarily know that there were or were not instructions provided for the tasks they completed. However, by fixing it to, "Classifies positions for which OPM has issued no classification standards," the statement becomes verifiable.



2. Give Everyone a Shot

- ✓ Avoid asking questions that limit applicants from the private sector, if the position is open to “All Sources”

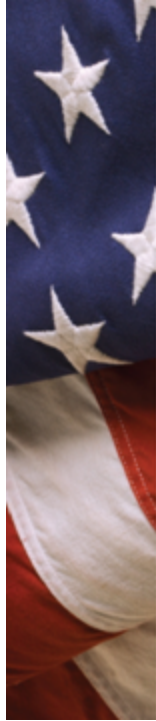


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8

Give everyone a shot. Avoid asking questions that limit applicants from the private sector if the position is open to all sources. "

This one is very straight forward. We were noticing that in some job opportunity announcements, agencies were looking for specific Government experience. Of course, this would be fine if the announcement was not open to all sources.



Limiting Examples

- Explains options to employees regarding **prior government service**.
- Interprets written material, including rules, regulations of **[Agency] Handbook 5005 and 5007** or similar legal handbooks governing the organization.
- Provides advice and guidance to management officials on **DEU/MPA** related processes and procedures.

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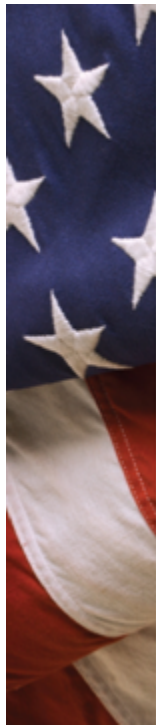
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Here are some examples that we found in actual OQs:

- Explains options to employees regarding prior Government service.
- Interprets written material, including rules, regulations of [Agency] Handbook 5005 and 5007 or similar legal handbooks governing the organization.
- Provides advice and guidance to management officials on DEU/MPA related processes and procedures.

An applicant from the private sector would probably not be able to explain options to employees regarding prior Government service, interpret agency regulations, or provide guidance about the delegated examining unit process.

Again, you want to be sure that if your announcement is open to all sources, individuals from the private sector should be able to respond to the occupational questionnaire items.



3. Careful What You Ask For

- ✓ Items that include multiple tasks/KSAs/competencies in one question force the applicant to have done everything listed to be considered, and to provide a single response for all of them

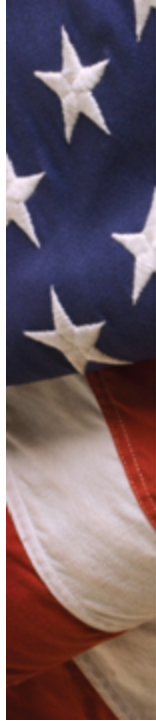
Note: This is acceptable if all tasks/KSAs/competencies are done in conjunction with each other, such that the level of expertise is likely to be the same



Careful what you ask for. Meaning, items that include multiple tasks/KSAs/competencies in one question force the applicant to have done everything listed to be considered and to provide a single response for all of them. (NOTE: This is acceptable if all tasks/KSAs/competencies are done in conjunction with each other, such that the level of expertise is likely to be the same).

This one is a little trickier because there is a caveat. Basically, we want to avoid asking about tasks/KSAs that seem related but are tapping different competencies. In other words, we don't want the applicant to say that they've done X, Y, and Z if they've really only done X and Y.

For example, if you're writing an OQ for a firefighter position, you wouldn't ask them to drive the truck, put out the fire, and perform CPR in one statement. Those are clearly different tasks and are done independent of one another. However, there are some tasks that are done together. So, using our firefighter example, you may ask if they are able to drive a fire truck and navigate through heavy traffic on route to a fire because those tasks are done together. After all, it doesn't help if you can drive a truck but are unable to navigate through traffic. So again, we want to separate out competencies that are independent of one another. Let's take a look at some examples.



Knowledge Check

- ✓ Which item(s) forces the applicant to have multiple competencies?
1. Designs or selects survey instruments to improve the quality and delivery of HR services.
 2. Communicates orally and in writing.
 3. Uses assessment methods to gather qualitative data and identify issues.

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11

Here's another Knowledge Check. Which of these statements forces the applicant to have multiple competencies?

1. Designs or selects survey instruments to improve the quality and delivery of HR services.
2. Communicates orally and in writing.
3. Uses assessment methods to gather qualitative data and identify issues.



Fixed Example

Original: Designs or selects survey instruments to improve the quality and delivery of HR services

Fixed: (1) **Designs** survey instruments to improve the quality and delivery of HR services.

(2) Reviews and **selects** survey instruments to improve the quality and delivery of HR services.

– Notice the change allows the applicant to more accurately respond about their skills

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12

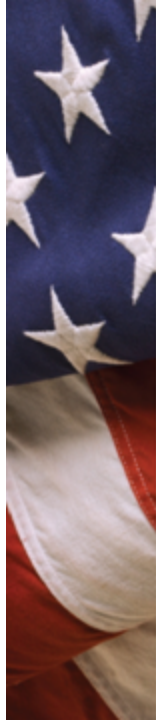
The first statement ("Designs or selects survey instruments to improve the quality and delivery of HR services.") forces the applicant to have multiple competencies. Designing a survey instrument is very different than selecting a survey instrument because designing a survey requires a greater level of technical skills.

By breaking up the statements, we allow the applicant to respond more accurately:

(1) **Designs** survey instruments to improve the quality and delivery of HR services.

(2) Reviews and **selects** survey instruments to improve the quality and delivery of HR services.

Notice how the change allows the applicant to more accurately respond about their skills.



Fixed Example (continued)

Original: Communicates orally and in writing

Fixed: (1) Serves as a spokesperson during meetings designed to solicit input from stakeholders.

(2) Prepares correspondence in connection with requests for information.

– Notice the change allows the applicant to more accurately rate each of their skills

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13

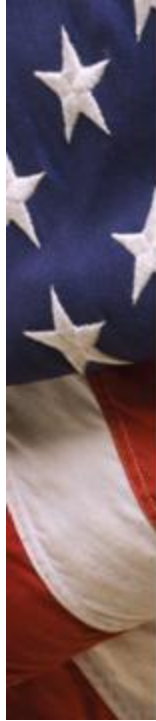
As for the second example ("Communicates orally and in writing."), combining oral and written communication is a common error we see. Some people can communicate extremely well in writing but struggle with oral communication. Conversely, an individual may be a great public speaker but have poor writing skills. It's a good idea to break these competencies out to get an accurate picture of the applicant's experiences.

In this instance, we fixed the original example by breaking it into two statements:

(1) Serves as a spokesperson during meetings designed to solicit input from stakeholders.

(2) Prepares correspondence in connection with requests for information.

Again, breaking the original example into two separate statements allows applicants to more accurately rate themselves on each of those skills (or statements).



4. Lost in Translation

- ✓ Avoid items that are vague, subjective, or use evaluative wording

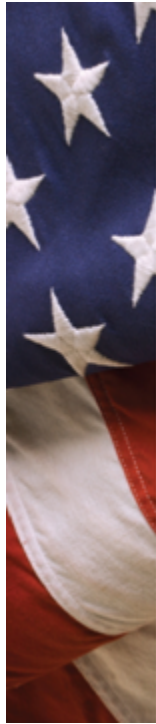


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14

It's very important that the applicant understands what the question means. Using words that are vague (or that can be interpreted a number of different ways) can make a question very confusing.

Another thing to avoid is using subjective or evaluative terms in your questions, such as "timely" or "efficiently." Using terms like that can cause your applicants to needlessly question themselves ("Did I really work efficiently?") rather than just report what actions/tasks they performed. Also, subjective and evaluative terms can be misinterpreted; what's considered "timely" by one person may not be considered "timely" to another.



Knowledge Check

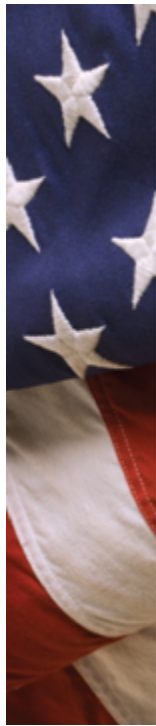
- ✓ Which item is vague or subjective?
1. Reviews and analyzes broad, complex policies
 2. Recommends strategies to resolve problems related to workforce planning, downsizing, and/or job turnover

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15

Let's do a Knowledge Check. Which of these two items is vague or subjective?

1. Reviews and analyzes broad, complex policies
2. Recommends strategies to resolve problems related to workforce planning, downsizing, and/or job turnover



Fixed Examples

Original: Reviews and analyzes broad, complex policies

Fixed: Reviews and analyzes workforce planning policies to ensure critical jobs are filled

- Notice the change takes out the ambiguity in the statement

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15

The item that is vague or subjective is the first one ("Reviews and analyzes broad, complex policies"). For one, how broad is broad? Is it area-wide? Agency-wide? Government-wide? Also, what is considered "complex"? Again, what one person considers as "complex" may be easy to another.

The best option is to write out exactly what it is you want the applicant to have done (or be able to do) in terms of complexity. For this example, we've changed the question from "Reviews and analyzes broad, complex policies" to "Reviews and analyzes workforce planning policies to ensure critical jobs are filled." The fixed version is better because it specifies what the "broad, complex" policies are referring to (workforce planning) and what that analysis is used for (to ensure critical jobs are filled). It gives the question more context, which gives applicants a better idea of what it is you're looking for from them.

Also, as a side note, the fixed question is a good example of when it's okay to use a double-barreled item ("reviews and analyzes"). More often than not, something will need to be reviewed prior to it being analyzed; therefore, these two actions often go in tandem. However, using both verbs should be used ONLY when an applicant will need to both review and analyze policies.



5. When in doubt....

- ✓ ...Stick to the formula
- ✓ Perform What (Action verb) + To Whom or What (Direct Object) + To Produce What or Why? How? (Qualifying Statement)



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17

When in doubt, or when you're having problems writing items, remember to stick to the formula:

Perform What (Action verb) + To Whom or What (Direct Object) + To Produce What or Why? How? (Qualifying Statement)

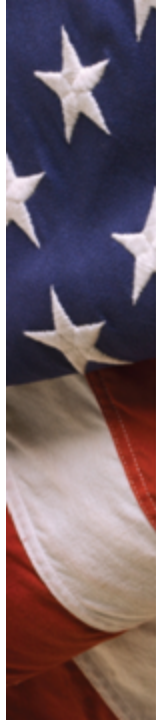
If you're getting stuck on the action verb, ask yourself: What will the applicant be doing? Are they reviewing something? Maybe editing? Presenting?

To what is this action being done? Is it for a report?

And for what purposes is this action being done? Is it to streamline a current process? Is it to help others' productivity?

The formula is not something you have to follow, but it can certainly help if you're experiencing "writer's block" when constructing questions or items for an occupational questionnaire.

Also, please keep in mind that writing items is not an easy process. It's really an art that takes time, patience, and practice to master.



Knowledge Check

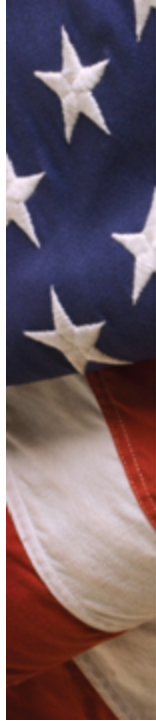
- ✓ Which question adheres to the formula?
 - Perform What + To Whom or What + To Produce What or Why? How?
- 1. Reviews and evaluates training programs
- 2. Facilitates meetings with managers to identify human capital problems

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18

Here's another Knowledge Check. Which of these questions adhere to the formula?

1. Reviews and evaluates training programs
2. Facilitates meetings with managers to identify human capital problems



Fixed Example

- Original: (Action verb) Reviews and evaluates (Direct Object) training programs (Qualifying Statement) ...?
 - Fixed: (Action verb) Reviews and evaluates (Direct Object) training programs (Qualifying Statement) to improve training for new employees
- Notice the change specifies the purpose

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19

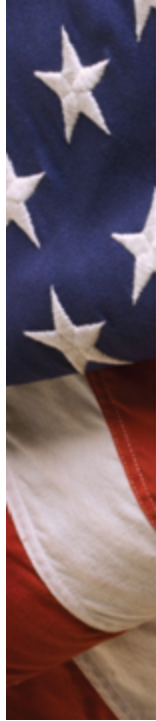
The second question ("Facilitates meetings with managers to identify human capital problems") adheres to the formula.

- (Action verb) Facilitates meetings (Direct Object) with managers (Qualifying Statement) to identify human capital problems

The first question has the first two pieces of the formula, but is missing the qualifying statement of "To produce What or Why? How?" The second bullet shows a possible fix:

- Original: (Action verb) Reviews and evaluates (Direct Object) training programs (Qualifying Statement) ...?
- Fixed: (Action verb) Reviews and evaluates (Direct Object) training programs (Qualifying Statement) to improve training for new employees

Notice that adding a qualifying statement to the first question specifies the purpose of the task (what the training programs will be used for), which, again, helps applicants understand the question better.



6. General Tips

- ✓ Avoid abbreviations/acronyms
 - E.g., DEU, MPA, MSPB, HC, FECAOQ
- ✓ Proofread
 - E.g., Apply and advise others on complex pay setting regulations and policies and insure pay accuracy for all customers
 - Don't repeat questions
- ✓ Check for outdated tasks
 - E.g., Ensure Rule of Three is applied on selections.
- ✓ Focus on quality over quantity

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20

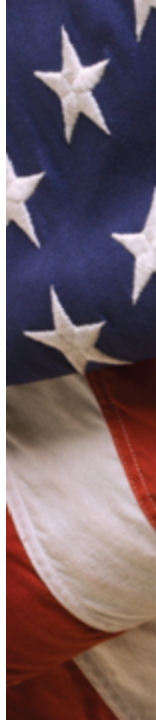
Avoid using abbreviations or acronyms. I know that in the Government, we love to use acronyms, but those not familiar with the acronyms won't know what they stand for. Acronyms can even differ among Government agencies, so it's always best to initially spell out what the acronym stands for. For example: "Writes memorandums of understanding (MOU) to be distributed to upper management" rather than just, "Writes MOUs...".

Proofread, proofread, proofread your occupational questionnaire. Some of the errors we came across in looking at occupational questionnaires posted on USAJOBS include misusing the term "insure": "Apply and advise others on complex pay setting regulations and policies and insure pay accuracy for all customers" (should be "ensure"). Also, check that questions are not being repeated within the same occupational questionnaire section.

Check for references to outdated (or archaic) procedures. For example, we found an occupational questionnaire asking applicants about their ability to "ensure the Rule of Three is applied on selections." The Presidential Memorandum, "Improving the Federal Recruitment and Hiring Process," (<http://www.whitehouse.gov/the-press-office/presidential-memorandum-improving-federal-recruitment-and-hiring-process>), replaced the use of the "Rule of Three" with Category Rating. So, not only is that item incorrect (Rule of Three is no longer being used), but applicants may be confused as to how to answer that item.

Also, please keep in mind that while you're evaluating applicants (via the occupational questionnaire), applicants are evaluating you and/or your agency, and mistakes like this can put your agency in a bad light, possibly causing you to lose good candidates.

Finally, focus on the quality of occupational questionnaire items over quantity. It's much more preferable to ask 4 good questions rather than beat around the bush with 15 mediocre questions. Having said that, there's really not a guideline or rule of thumb for how many questions or items you should have on an occupational questionnaire. The number can vary by how many competencies you're addressing and how complex the subject matter is.



Write it Right!

- **Select the best question:**

1. Oversees the recruitment and placement for positions, up to the GS-15 level.
2. Interacts with a wide variety of people, internally and externally.
3. Use word processing software to produce forms, reports and correspondence.

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21

Now for another Knowledge Check. Please select the best question from these three choices:

1. Oversees the recruitment and placement for positions, up to the GS-15 level.
2. Interacts with a wide variety of people, internally and externally.
3. Use word processing software to produce forms, reports and correspondence.

The best question of those three options was the third question ("Use word processing software to produce forms, reports and correspondence."). It follows the formula and doesn't succumb to any of the previous pitfalls we have discussed.

As a note, the verb could be plural ("Uses"). Whether or not you use plural verbs in your occupational questionnaires is up to you and your agency; just be sure to be consistent in your use of singular or plural.

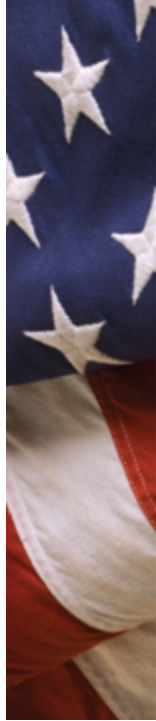
The issues with the other questions are as follows:

Question: Oversees the recruitment and placement for positions, up to the GS-15 level.

Issues: Uses "Government-ese" in terms of referring to "GS-15"; not everyone outside of the Government is going to know what that means (and may even be confusing to those in the Government). Also, the question is a bit vague. A lot of various tasks and activities go into recruitment and placement; it would be better if this item specifically stated **WHAT** the applicant would need to oversee in terms of recruitment and placement.

Question: Interacts with a wide variety of people, internally and externally.

Issues: This question also falls under the "vague" pitfall. What is meant by "interact"? Is it an email every week or so? Daily face-to-face contact? And "wide variety of people" doesn't give any context at all as to WHOM the applicant will be dealing with. Only fellow colleagues? Only upper-management? As for "externally," does that mean outside of their office? Or outside of their agency? Adding specific details to this question would help immensely.



Write it Right!

- **Select the best question:**
 1. Prepares reports covering specific requested data on disciplinary actions from a computer generated reporting system.
 2. Manages multiple tasks simultaneously.
 3. Plans, directs and performs system management, quality assurance, system inquiry, trend analysis, small computer operations/management and system research.

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22

Another Knowledge Check. Which of these three questions are the best?

1. Prepares reports covering specific requested data on disciplinary actions from a computer generated reporting system.
2. Manages multiple tasks simultaneously.
3. Plans, directs and performs system management, quality assurance, system inquiry, trend analysis, small computer operations/management and system research.

The first question is the best one ("Prepares reports covering specific requested data on disciplinary actions from a computer generated reporting system."). Like the other best question from the previous Knowledge Check, it follows the formula and doesn't succumb to any of the previous pitfalls we have discussed.

The issues with the other questions are as follows:

Question: Manages multiple tasks simultaneously.

Issues: This one is still a bit vague in the sense the applicant doesn't know what those tasks are or what kinds of tasks are being managed simultaneously. Do the tasks have competing priorities? Do they all have tight deadlines? A little more explanation of what kinds of tasks are being managed would be useful.

Question: Plans, directs and performs system management, quality assurance, system inquiry, trend analysis, small computer operations/management and system research.

Issues: This question has way too much (too many tasks) going on. Not only that, but the "tasks" are actually very complex areas (quality assurance has many pieces and parts); a question (or many) could be focused on quality assurance alone. It would be much more useful for this question to be broken apart and to focus on each area specifically as needed. Finally, the question is missing the qualifying statement (To Produce What or Why? How?).



One-on-one agency assistance available!

Assessment_Information@opm.gov

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23

That concludes our presentation! Thank you so much for your participation and we hope the information presented was useful to you.

We also want to remind you of our One-on-One assistance that's available for free. It provides technical guidance to agency HR professionals and hiring officials on assessment strategy and development. If you want more information about training or assessment-related services, email us (Assessment_Information@opm.gov) and we will put you in touch with the right people.