**TECHNICAL EVALUATION REPORT**

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| --- | --- |
| **Position Number:** |  |
| **Agency:** |  |
| **Bureau/Division/Field Office:** |  |
| **Incumbent Name or Vacant:** |  |
| **Current Job, PSG, & BU:** |  |
| **Recommended Job, PSG, & BU:** |  |
| **Review Type\*:** |  |
| **Date Request Received in HR:** |  |
| **Desk Audit Date** (or N/A)**:** |  |
| **Supervisory Discussion – Name(s) and Date(s)** (or N/A)**:** |  |
| **Reviewing Analyst:** |  |
| **Recommendation Date:** |  |

\*MI – Management Initiated, EI – Employee Initiated (not supported by supr./mgr.), HRI – HR Initiated

**Position Purpose**

* Summarize in one or two sentences why this position exists (“This position…”):

**Background Information**

* Provide any background material as to “why” the review was initiated (e.g., downward reclassification for recruitment):
* For a new position, explain the reason for its establishment (e.g., new work, restructuring):
* Provide any relevant position classification history and program information that gives context for the review:

**Position Relationships**

* Job title, position number, incumbent name, and – if it adds value - general functions
* Supervisor:
* Peers:
* Subordinates:
* Lead work (i.e., a permanent organizational relationship that includes assigning, interpreting, and reviewing the work):
* Oversight of contracted staff (and role):

**Duties and Responsibilities**

* Summarize, in appropriate detail, the key duties and responsibilities assigned to the position. List in general order of workflow and importance:
* Include specific examples of work, as relevant.
* Include statistics to provide a clear picture of the “size” of the position or its fit in the organization (e.g., budget).
* Describe the nature and frequency of the incumbent’s contacts both inside and outside the agency.

**Changes in the Work**

* Identify and explain changes to the position’s work since the last review, and the reason for the changes:

**Problems and Challenges Confronted**

* Describe the greatest challenge in the position as well as the nature, scope, and variability of problems confronting successful performance of the position. Indicate how these problems are resolved by the incumbent:

**Decision Making Authority/Controls on Position**

* Identify the types of problems or issues the incumbent can resolve on their own versus those referred to the supervisor or others for resolution: (i.e., common decisions completed without supervisory discussion or guided by past practice or policy versus an example(s) of a decision or action that must be referred to someone else):
* Describe the nature of supervisory review, policies, procedures, etc. that limit the incumbent's freedom to solve problems or to act:

**Allocation Criteria, Position Analysis, and Conclusion (Recommended Job)**

* Identify any job classifications that HR was asked to consider, as well as other initially reasonable job classification possibilities. Eliminate jobs that are not the most appropriate by way of argumentation. Explain why these were considered and found to be inappropriate:
* Identify and relate the significant aspects of the position’s work to the specific allocation criteria contained in an appropriate job specification:
* The recommended job:

**Additional Information**

* If relevant, identify anything additional not covered in other sections