

Job Evaluation Matrix (Marking Sheet)

Job title _____

Responsible to (job title) _____

Location **Head Office/Regional Office/Site Office/Site** *[please delete as appropriate]* _____

Evaluated by (Name and job title) _____

Date of evaluation _____

EVALUATION

Factor

	A	B	C	D	E	F	Comments
Responsibility for End Results	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Job Knowledge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Problem Solving and Decision Making	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Planning and Organising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Communication and Influencing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

OUTCOME

Grade: _____

Observations

ENVIRONMENTAL ENGINEERING INDUSTRY

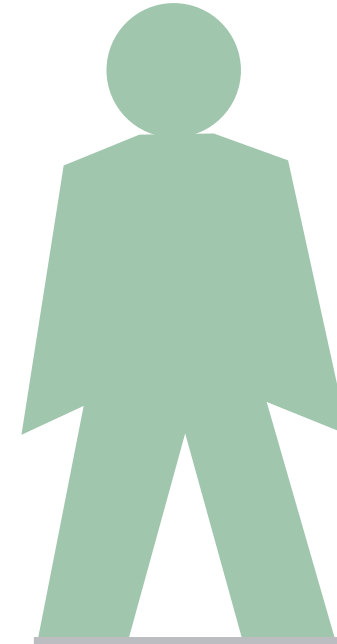


STAFF SALARY AGREEMENT



JOB EVALUATION/ GRADING SCHEME

Guidance Notes



What is job evaluation?

Job evaluation is a method of comparing different jobs to ensure that all staff are graded **fairly and equitably** – when considering each job in relation to others in the organisation – and **equally** with other staff undertaking similar jobs or jobs of equal value. Only the *job* is evaluated, *not the person doing the job*.

It is a process that seeks to measure objectively the different elements of a job. The jobs are placed in a rank order according to their size, thereby producing a hierarchy of jobs/grades – providing a basis for a fair pay and grading structure – though job evaluation itself is not directly about pay. The aim is to reflect the demands made upon the job as well as the value of the job in the organisation.

A job evaluation scheme can ensure:

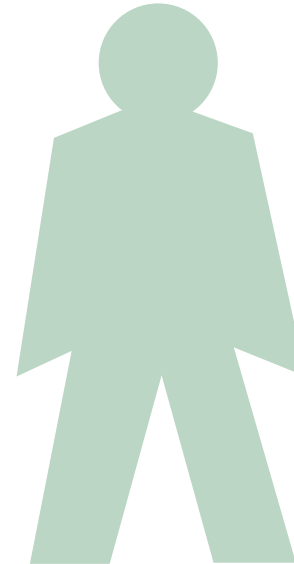
- a fair, equitable and transparent process for comparing the relative size of jobs;
- consistency and parity across an organisation;
- a demonstration of the principle of equal pay for work of equal value;
- the promotion of fairness and equality generally.

Who grades the job?

Jobs should be evaluated by an appropriate manager (or in smaller companies it could be the proprietor) – although, where resources allow, it may be desirable to have a small panel of managers responsible for evaluating jobs. This approach brings greater objectivity – and commonality of approach across the company – and leads to the establishment of evaluation standards within a company.

Of primary importance, the person(s) conducting the

How does this job evaluation/grading system work?



What is needed to grade a job?

evaluation must have good knowledge of the job to be graded.

Jobs are measured in two principal ways: there are five **job evaluation factors** (which are intended to reflect the main activities of a given job – *the job's breadth*); and there are six **factor level** definitions (which are intended to reflect the extent of a job's responsibilities – *the job's depth*).

The five **job evaluation factors** are:

- Responsibility for end results
- Job knowledge
- Problem solving and decision making
- Planning and organising
- Communication and influencing

A description of the **job evaluation factors** – what each factor assesses – is set out on page 9. The factors have been chosen carefully to reflect the job demands and values that are important within the industry.

The **factor level definitions** are on pages 10-19.

To grade a job you will need:

- a job description – *Ideally, this should be written, but – in smaller organisations – it could be based on the knowledge of the proprietor or a senior manager, or on a verbal understanding about who does what and what each job requires*
- these job grading Guidance Notes
- the marking matrix, which provides a record of the overall evaluation outcome and the grade awarded to the job – a sample is on the back page.

What kind of jobs can be graded using this scheme?

Jobs of all disciplines can be graded using this scheme. This includes functions such as Accountancy and Human Resources which are not specific to our sector.

Here are a few examples:

COMMERCIAL

Senior Quantity Surveyor

Estimator

PLANNING

Senior Planner

Planning Engineer

DESIGN

Senior Design Engineer

CAD Technician

OPERATIONS

Senior Contracts Engineer

Assistant Project Engineer

ADMIN AND SECRETARIAL

Secretary

Receptionist

It is important to recognise that not all jobs with the same title will actually cover all the same duties – either within the same company or from one employer to another.

Jobs with the same title could vary in grade from one employer to another depending on a range of factors – including job responsibilities and content, company size, organisation structure, size of contracts handled.

A job description should be designed to collect as much information as possible about a job.

Ensure it brings out the characteristics of the job which are explicitly envisaged in this particular scheme – as evidenced by the **job evaluation factor** descriptions shown on page 9 below.

Job descriptions are not essential, but where they do exist they should include most or all of the following information so as to aid the grading process:

- *primary purpose of the job*
- *main job duties*

- *responsibility for end results*
- *job knowledge*
- *problem solving and decision making*
- *planning and organising*
- *communication and influencing*
- *an organisation chart, including job title of job holder's immediate superior*
- *job titles of staff reporting directly and indirectly to the job holder*
- *any other relevant information*

Job descriptions may also need to refer to responsibilities arising from the company's policy in relation to such matters as quality assurance management, health and safety and for environmental concerns.

How to grade a Job

Ensure the job description fully describes the job – if necessary, by interview/discussion with the job holder – while remembering it is the *job* that is being evaluated and graded, *not the person* doing the job.

Consider the aspects of the job – i.e. the responsibilities, duties and demands of the job – in relation to the **job evaluation factors** on page 9 and the **factor level definitions** on pages 10-19, while bearing in mind that the factor level definitions also differentiate between managerial and functional levels of responsibility. When a job has changed and is being re-evaluated, do not be influenced by any existing job description or job title; the evaluation should solely be concerned with the job currently being undertaken by the job holder.

Try to match the job description to the appropriate (functional and/or managerial) level for each factor.

This will tell you the factor level for this aspect of the job. Repeat this for each of the five factors.

Writing Job Descriptions

Use the marking matrix (back page) to keep a record of the level (A to F) awarded for each factor.

Once you have done this, the ticks in the boxes will determine the grade. This should be straightforward in most cases.

In less clear-cut cases, guidance on assessing the overall evaluation outcome (and therefore the grade of a job within the scheme), is set out below:

Evaluations spread over 2 levels				
<i>Eg.1</i>	<i>Eg.2</i>	<i>Eg.3</i>	<i>Eg.4</i>	<i>Eg.5</i>
E	D E	D E	D E	D E
X	X	X	X	X
X	X	X	X	X
X	X	X	X	X
X	X	X	X	X
X	X	X	X	X

Examples of evaluations spread over 3 levels					
<i>Eg.6</i>	<i>Eg.7</i>	<i>Eg.8</i>	<i>Eg.9</i>	<i>Eg.10</i>	<i>Eg.11</i>
C D E	C D E	C D E	C D E	C D E	C D E
X	X	X	X	X	X
X	X	X	X	X	X
X	X	X	X	X	X
X	X	X	X	X	X
X	X	X	X	X	X

Additional permutations are possible where the evaluated factor levels are non-contiguous.

Overall Outcome - Grade Level

The grade will be determined by reference to the factor level with the majority number of evaluations, e.g. Example 2 = grade D; Example 5 = grade E; Example 8 = grade E.

Where an evaluation is initially spread over three factor levels, the evaluation assessments should be reviewed with the aim of the spread being over less than three factor levels.

All factors carry the same weighting since they all must be applied to do any job satisfactorily. However, in these cases where an evaluation is spread over three factor levels, any factors that significantly underpin the job in question should carefully be reviewed for their emphasis and should influence the final grade.

However, where the initial evaluation is confirmed and no single factor has a majority number of evaluations, the grade will be determined by reference to the 'line of best fit' (the middle factor level), e.g. Example 9 = grade D; Example 10 = grade D; Example 11 = grade D.

Not necessarily. It may be possible to select a small number of representative, benchmark jobs – grade them – and then slot in the other jobs in the organisation into that broad structure.

For example, if, say, in a particular company the Buyer has always been regarded as being of a lower level status than, say, the Senior Estimator whose job had been evaluated at grade F, but was senior to the Assistant Project Engineer whose job had been placed in grade D, then the appropriate grade for the Buyer within the company's hierarchical order is likely to be grade E – in the absence, of course, of any special features.



Appeals

It is considered that appeals are most likely to arise in cases where an evaluation is initially spread over three factor levels. It is re-emphasised that in such cases the evaluation assessments should be reviewed with the aim of the spread being over less than three factor levels and, thus, reducing the possible likelihood of an appeal.

Where an employee is dissatisfied with his/her job grading, he/she may institute the appeals procedure which is contained in Appendix D of the National Joint Council Handbook of Agreements.

Advice and assistance

Enquiries from employers should be directed, as appropriate, either to the ECA Employee Relations Department or the BESA Employment Affairs and Skills Department.

The job evaluation co-ordinator of the National Joint Council – John Meadley – can be contacted for advice by employers or employees, telephone 020 7313 4914, or email john.meadley@besa.com

If preferred, EESA members can obtain advice and assistance from their local EESA official.



Electrical Contractors' Association

Lincoln House
137-143 Hammersmith Road
London W14 0QL
Tel: 020 7313 4800 www.eca.co.uk



Electrical and Engineering Staff Association

Unite House
128 Theobald's Road
London
WC1X 8TN
Tel: 020 7611 2500 www.unitetheunion.com



Building Engineering Services Association

Lincoln House
137-143 Hammersmith Road
London W14 0QL
Tel: 020 7313 4900 www.thebesa.com

Job Evaluation Factors

- Responsibility for End Results**
- Impact of role on the business (direct and indirect).
 - The requirement to accept responsibility for the consequences of actions.
 - The requirement to understand customer needs and translate into actions.

- Job Knowledge**
- Knowledge of internal systems, procedures, products and organisation.
 - Professional and technical knowledge that demands an academic qualification or equivalent through experience.
 - Legislative and regulatory requirements.

- Problem Solving and Decision Making**
- The need to use business, engineering or technical knowledge/experience/principles.
 - The need to consider the effect of internal and external influences, e.g. political, economic or legal.
 - Any indicators that reflect the requirement for the comprehension of complex information.
 - The degree to which the role requires innovative thinking and creativity.
 - The nature of the judgements that are demanded by the role in terms of their complexity, diversity and the degree to which they have to be made without all the required information.

- Planning and Organising**
- The requirement to motivate, plan, co-ordinate, direct and check own work and the work of others taking account of the complexity of that work, e.g. as a supervisor, project manager or functional expert.
 - The need to help improve the knowledge and skills of other people including their development and training.
 - The demands of the management task in terms of the complexity and diversity of the activities directed.

- Communication and Influencing**
- The verbal communication demands, e.g. one-to-one or group presentations.
 - The written communication demands, e.g. correspondence, reports and minutes.
 - The complexity of the ideas, concepts, procedures and policies that are being promoted.
 - The need to develop collaborative working with other people within a team, within the company and externally.
 - The need to influence and persuade other people.
 - The need to provide information or technical guidance that influences the decisions of other people.

Broadband factor level definitions: Responsibility for End Results

FUNCTIONAL

A • Completes **straightforward stand-alone tasks** or repetitive process activities.

B • Completes a mix of routine and **non-routine tasks** or process activities.

C • Provides **advanced administrative or straightforward technical services** requiring an understanding of customer needs, where the work undertaken impacts people in immediately related areas.

D • Provides **basic professional/technical level input** across a business area or to customers based on a good understanding of the principles that underpin the discipline.

E • Provides **complex professional/technical input** across a business area or to customers based on a thorough knowledge of the underlying concepts gained either academically or through long experience of the work undertaken.

F • Operates as a **function head or a lead professional** depending on the size of the business, demonstrating a sound appreciation of wider business principles.

MANAGERIAL

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- May lead the work of a small team directly.
- Decisions have some short term consequences within and outside immediate confines of the job.

- Supervises people, sometimes through team leaders, within defined procedures and has clear operational focus.
- Decisions have important short term effects and some long term effects across the company.

- May be a lead or supporting professional depending on the size of the business.
- Manages work, sometimes through supervisors or team leaders, where it may be a mix of activities and limited integration with other functions is required to meet customers' needs.
- Decisions may have long term consequences on the company's business.

- Integrates related business activities through other levels of management where the impact is primarily internal to the business unit within which the role operates.
- Decisions invariably have long term consequences on the company's business.

Broadband factor level definitions:

Job Knowledge

FUNCTIONAL

- A**
- Demonstrates knowledge of **routine and repetitive work** practices requiring **straightforward knowledge** of the work of own section.
 - Most activities undertaken are transaction based and short cycle.
 - Requires limited instruction to become competent in the range of activities undertaken – no previous experience required.

- B**
- Demonstrates familiarity with a range of basic activities and processes often through on-the-job experience and structured training.
 - Is competent to undertake **multiple routine tasks** within the field.
 - Is required to absorb and apply new role related information as required.

- C**
- Performs a limited range of advanced administrative or straightforward technical/professional activities in a narrow range of contexts.
 - **Applies company policies and procedures** and appreciates the external rules that impact the role, e.g. legislation, codes of practice or regulatory requirements.
 - Has technical understanding relevant to role, e.g. understands basic relevant technical, administrative, organisational or information management principles.

- D**
- Performs a range of technical or professional activities in well-defined contexts.
 - **Demonstrates developing knowledge of the theory** and principles underlying the discipline.
 - May be working towards accreditation by a professional body.

- E**
- Performs a **complex range of technical or professional activities** in a wide variety of contexts.
 - Appreciates the wider business activities related to area of specialism.
 - Demonstrates knowledge of the concepts underlying the discipline.
 - Has detailed knowledge of software and reporting tools applicable to the role.
 - Acts as a source of technical information and advice on own work area.
 - Applies awareness of relevant legislative, regulations and emerging issues.
 - May qualify for membership of a professional body.

- F**
- Applies **specialist knowledge** of discipline across various parts of the organisation with an understanding of the impact.
 - Has a deep understanding of area of the specialism and is a source of advice to the company.
 - Detailed knowledge of relevant legislative and regulatory requirements - assists in the development of company policy, standards and procedures.
 - Demonstrates deep understanding of the process features and a good understanding of the technical features of the work of the team.

MANAGERIAL

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- Demonstrates knowledge of work including some non-routine activities in order to lead the work of a small team.
- Has acquired basic work organisational skills.

- Understands work programmes short to medium term supported by the team.
- Has a good working knowledge of company management systems.
- Demonstrates effective leadership and resource management skills.
- General knowledge of legislation relevant to managing the team.

- Develops work programmes short to medium term supported by the team.
- Has a detailed knowledge of company management systems relevant to the role and applies a good knowledge of legislation relevant to the team.
- Demonstrates technical proficiency in work managed and is recognised as the leader in that activity, e.g. in a small business unit.

- Demonstrates effective people management and leadership skills to manage a number of related activities through other levels of management.
- Has a detailed knowledge of a wide range of company management systems, human resources, finance and safety and applies a detailed knowledge of legislation relevant to team.

Broadband factor level definitions: Problem Solving and Decision Making

FUNCTIONAL

- A**
- **All work is routine** and is covered by rules and set procedures.
 - Advice and supervision is readily available for new situations.
-
- B**
- Most problems have been experienced before and solutions are based on experience, precedent, established custom and practice, or procedures.
 - Exercises judgement, mainly the selection of the right procedure, is aware of consequences of own actions on others and knows when to act or to refer - **Supervision is generally available**.
 - Decisions include ordering/prioritisation of tasks and organising own time.
-
- C**
- **Solves problems on a range of routine tasks** within own competence, knowing when to seek advice in new situations or with exceptions to established procedures.
 - **Mainly follows established procedures and precedents**, although there will be some requirement to interpret these to find the appropriate solution.
 - Contributes to technical or business decisions and makes operational decisions within the scope of their authority.
 - Expected to work without close supervision and may cross check colleagues' results.
-
- D**
- **Solves technical problems on a range of tasks** – some of which may be of a non-routine nature – in own discipline, applying an understanding of the basic principles relevant to the discipline, e.g. to solve customers' problems.
 - Understands when to apply the standard procedures and when to seek advice.
 - Examines possible options using policy, company standards and precedent and follows appropriate procedures.
 - Makes straightforward technical or professional judgements in own discipline.
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- E**
- Applies technical knowledge to resolve problems related to own area, or allocated projects throughout the business, and identifies appropriate solutions.
 - **Leads the implementation of agreed solutions** resolving consequential operational problems, health and safety issues and the impact on customers.
 - Makes technical or professional judgements/decisions in their discipline – taking the advice of specialists who are available to provide technical advice and guidance.
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- F**
- Applies technical knowledge to resolving problems throughout the business and identifies innovative approaches and solutions.
 - Acts as the **leading technical expert** and as the **primary day-to-day decision making point within the discipline**.
 - **Identifies business risks** of actions undertaken where these could have a significant impact and ensures that these are properly understood and managed.

MANAGERIAL

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- Resolves day-to-day questions from own team.
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- Solves straightforward problems using investigation and analysis.
 - Balances conflicts in operational demands and priorities, e.g. customer issues with the financial implications of work undertaken.
 - Makes day-to-day decisions relating to disciplinary and performance issues, undertaking the early stages of the appropriate procedures.
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- Identifies resource conflicts (e.g. people, finance) and the implications of adverse events and develops solutions in order to deliver the required schedule of work.
 - Makes decisions relating to disciplinary and performance issues, undertaking all the stages of the appropriate procedures up to dismissal.
 - Managerial decisions are often based on experience of similar situations.
-
- Identifies conflicting demands and priorities and balances a range of variables to deliver business results and meet customers' expectations.
 - Establishes ways to improve efficiency and minimise cost.
 - Resolves people management issues within area of responsibility.
 - Manages the knock-on effects of decisions made on other areas and advises others of decisions as required.
 - Managerial decisions can often require a high level of creative thinking.

Broadband factor level definitions: Planning and Organising

FUNCTIONAL

- A**
- Delivers outputs against well-defined procedures.
 - **Work usually follows a regular daily or weekly cycle.**
 - Works under supervision and to directed timescales.
-
- B**
- **Prioritises own day-to-day work** to meet time scales set by manager or by any scheduled cut-off dates.
-
- C**
- Manages own priorities and plans, schedules and monitors own work with direction.
-
- D**
- Determines work plans and methods to meet task requirements that are allocated in terms of result expectations and outcomes.
 - Involved in and contributes to tasks/projects involving people outside team.
-
- E**
- Responsible for the preparation and control of budgets and operates within financial and commercial constraints and the overall statutory framework.
 - Determines work plans and methods for a multi-disciplinary team delivering small projects or parts of larger projects with 6–12 month timescales.
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- F**
- Identifies and agrees role objectives, develops plans and leads their implementation with a high level of personal autonomy.
 - Plans, organises, budgets and resources their tasks.

MANAGERIAL

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- **Allocates work to a small team** in order to achieve team targets.
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- **May supervise the work of others** ensuring it is completed to the required standard and for applying the first stages of the performance management system.
 - Develops team members and manages a range of variables including staffing and tasking.
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- Leads and supports a multi-disciplinary team delivering small projects or parts of larger projects.
 - Manages a number of related activities usually **through team supervisors** and sets the work standards and timescales.
 - Applies all the stages of the performance management system.
 - Provides input to people development needs and resource requirements.
 - Contributes to the setting of financial budgets and is accountable for delivery against these targets.
-
- **Delegates effectively through multiple layers of management** against a medium-term focus.
 - Delivers against plan, measures outcomes against agreed deliverables and adjusts plans to mitigate adverse consequences.
 - Provides detailed planning for team - resource allocation, prioritisation, financial, planning.

Broadband factor level definitions: Communication and Influencing

FUNCTIONAL

- A**
- Requires a **basic level of communication** with others.
-
- B**
- Prepares straightforward written communications, e.g. letters and e-mails.
 - Demonstrates customer sales or servicing skills e.g. counter sales or call centre.
 - Takes responsibility for **straightforward queries**.
-
- C**
- **Needs to influence/persuade others**, e.g. straightforward sales/service or to recommend alternative methods to improve reliability or efficiency.
 - Interacts with people at all levels in the organisation and perhaps externally.
 - Originates some written documentation, for example straightforward reports, information sharing, and helping to create presentations for others to present.
 - Takes responsibility for technical enquiries.
-
- D**
- **May negotiate for services/resources** with others in the company or contractors.
 - Gives technical advice and guidance to customers, colleagues and others.
 - Demonstrates front line sales/servicing skills, e.g. field sales or account management.
 - Originates written documentation, for example straightforward reports, information sharing, and creating/delivering straightforward presentations, e.g. to others within own work area or project team.
 - Participates in working, professional or user groups within work area/discipline.
-
- E**
- Works with others outside the immediate work area, including customers, leading and facilitating on issues and acting as the technical specialist.
 - **Develops collaborative working relationships** across a wide range of company and client-related activities.
 - Sells ideas to others, providing proposals, justification, explanation and benefits.
 - Prepares written reports on specific issues to inform others on technical/professional issues in their own specialism.
 - Makes presentations and contributes technical input to management meetings representing the function.
-
- F**
- **Explains complex ideas** and makes technical and general presentations to internal and external people at all levels.
 - Produces complex documentation with original narrative e.g. reports or policy documents.
 - Influences and persuades a wide variety of people at all levels of the company to achieve business objectives.
 - Demonstrates ability to manage conflict and uncertainty while maintaining positive relationships.

MANAGERIAL

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- Liaises with supervisor on day-to-day work issues and passes on information to/from the team.
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- **Gives instructions to team members** to allocate work where some work is routine.
 - Liaises with supervisor on day-to-day work issues and passes on information to/from the team.
-
- **Allocates work to team**, monitoring and maintaining standards for values, behaviour, and discipline.
 - Encourages collaborative relationships within the team to help meet team objectives.
 - Effectively introduces and manages new procedures or work practices.
 - **Communicates with team on a range of issues**, understanding their needs.
 - Communicates effectively where there is an impact on others.
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- Sets standards for values, behaviour, and discipline.
 - **Represents the team in management meetings.**
 - Makes case for local change initiatives and introduces and manages change.
 - Undertakes initial formal stages of disciplinary and grievance procedures.
-
- Prepares written plans and schedules and reports on specific issues.
 - Leads presentations, both internal & external, on a range of issues including technical, work programme and financial.
 - **Provides leadership and supports management team** members in realising their accountabilities.
 - Develops and consolidates collaborative relationships across different business areas to help meet organisational objectives.

Job Evaluation Matrix (Marking Sheet)

Job title

Responsible to (job title)

Location **Head Office/Regional Office/Site Office/Site** *[please delete as appropriate]*

Evaluated by (Name and job title)

Date of evaluation

EVALUATION

Factor	A	B	C	D	E	F	Comments
Responsibility for End Results	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Job Knowledge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Problem Solving and Decision Making	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Planning and Organising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Communication and Influencing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

OUTCOME

Grade:

Observations