

Job Analysis Study Summary

The three major activities that comprise the job analysis process described in this report are as follows:

1. **Job Analysis Committee Meeting** – A gathering of subject matter experts (SMEs) to discuss and develop a description of the scope of practice
2. **Job Analysis Survey** – A large-scale survey of practitioners not involved with the SME panel to validate the task and knowledge statements developed by the committee
3. **Development of Examination Specifications** – The development of an Examination Content Outline by the committee based on the results of the survey

Job Analysis Committee Assembled | Feb 15-28, 2023

- 13 practitioners, including 3 AFC certified AFCPE Staff Members, were assembled by AFCPE to serve as subject matter experts (SMEs) on the Job Analysis Committee. AFCPE selected subject matter experts to represent a wide variety of work-related characteristics, geographic locations, and constituency areas to develop a scope of practice.

Job Analysis Committee Meeting to Draft Task & Knowledge Statements | Apr 14, 2023

- PSI Services LLC conducted a Job Analysis Committee meeting with SMEs to discuss the scope of practice and develop a list of tasks and knowledge areas that reflect the job role. PSI led the SMEs in refining task and knowledge statements and organizing them into a domain and subdomain structure. The outgoing exam content outline was used as a resource when developing the knowledge and tasks.

Job Analysis Survey Pilot | Apr 24-May 15, 2023

- A pilot survey was conducted with the Job Analysis Committee, the interviewees, and AFCPE staff members.

Job Analysis Survey Distributed | Jun 12-Jul 31, 2023

- A large-scale survey of practitioners was conducted to validate the task and knowledge statements developed by the SME panel. This live survey was sent using online survey software.

- **563 individuals responded to the survey.**
- Following the close of the survey, **205 respondents were removed for not completing the survey or for providing responses lacking any variance.**
- **354 total responses were used for statistical analysis.**
- The results of the job analysis were used to develop a validated assessment that reflects the competencies required for competent job performance.

Job Analysis Committee Meeting to Review Survey Results | Oct 20 & Nov 3, 2023

- The committee reviewed the task statements and retained all but two of the task statements. The following tasks were eliminated because they were not determined to be important enough for inclusion on the outline:

T40. Encourage a client to organize paperwork for tax preparations

T121. Educate a client about family and business considerations in estate planning

- The committee decided to keep the following tasks but revise the language:

	Original Version	Revised Version
T11	Use counseling strategies congruent with a client's learning style(s) (e.g., auditory, visual, kinesthetic)	Use multi-modal counseling and education strategies
T48	Assist a client in evaluating job offers	Assist a client in evaluating job offers (including but not limited to compensation packages and benefits)
T105	Educate a client about long-term care insurance	Educate a client about long-term care considerations
T112	Educate a client about investor protection resources	Educate a client about investor protections
T120	Educate a client about estate planning and end-of-life documents	Educate a client about estate and end-of-life planning

Changes Summarized

- Revised to include number of questions per cognitive level at the domain level only to allow for more flexibility for item writers.
- Removed examples which committee felt were both leading and limiting.



- Removed gender-specific pronouns.
- Streamlined and consolidated sub-domains to provide more flexibility in item development and to create room for changes that may occur in the industry during the years between JA studies.