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**GUIDE TO WRITING JOB
DESCRIPTIONS**

Office of the President

Human Resources
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OVERVIEW

What is a Job Description?

A **job** is a collection of tasks and responsibilities that an employee is responsible to conduct. Jobs have titles. **Job descriptions** are lists of the general tasks, or functions, and responsibilities of a position. Typically, they also include to whom the position reports and the qualifications needed by the person to perform the job.

A job description explains the following:

<u>WHAT A WORKER DOES</u> Duties Tasks	<u>HOW THE WORKER DOES IT</u> Methods Tools Techniques
<u>WHY THE WORKER DOES IT</u> Products Services	<u>WORKER QUALIFICATIONS</u> Skills Knowledge Abilities Physical Demands

When Should a Job Description be Written?

A job description should be written when:

- A new job is created
- A job's responsibilities have significantly changed.
- A job's reporting relationships (i.e. supervisory and subordinate positions) change
- A job becomes vacant and reviewed prior to posting to verify that responsibilities, requirements and reporting relationships are accurate.

Where to Start...

Writing a job description begins with collecting the facts concerning the job and then summarizing them into a meaningful form.

When writing a job description **use the most current information available** and **keep all statements factual and job- (*not incumbent*) related.**

Information you'll need to gather about the job includes:

- Primary responsibilities and expected deliverables,
- Supervisory relationships,
- Other persons, departments, agencies and organizations the position interacts with,
- Financial responsibilities,
- Necessary knowledge, skills and abilities,
- Equipment used
- Working conditions.

Sources of information for writing job descriptions may include organizational business plans, review of job-related information, observation of work, personal knowledge of the job and/or the on-line jobs library.



DON'T GET BOGGED DOWN IN THE DETAILS!

- A job description should communicate the results of the work assigned to a position. If too much detail is included in defining tasks, the job description will need to be updated when even the most minute detail changes.
- The job description becomes cluttered when excessive detail is included. One can easily lose sight of the purpose of the position and the work! Such job descriptions make it difficult to identify the appropriate information for management and human resource purposes.

ORGANIZATIONAL ROLES

Definition:

Managers direct, plan and control all functions of a clearly defined unit. A unit is normally composed of multiple subordinate managers or supervisors and staff.

Managers do the following:

- Direct the programmatic work of the functional unit;
- Establish budgets, long-range objectives, goals and criteria for monitoring progress and measuring success.
- Administer organizational policies through subordinate managers;
- Determine resource needs, negotiate allocation of resources and manage unit resources and expenditures;
- Determine assignments, goals and objectives of subordinates, monitor work and take corrective action when necessary. Has the authority to hire, fire or

promote employees or makes recommendations of such action to the next level of management.

Managers are differentiated from Supervisors and Leads (individual contributors) who serve as work/team leaders in terms of position focus and role; i.e., the nature of the work performed is largely focused upon the managerial aspects of the work – management of people and resources -- rather than on the specifics of the work itself.

Executive Directors and Directors are also managers who typically direct large units or departments with multiple functions.

Supervisors are responsible for the day-to-day work of a small group. They are experienced in the work of the unit although they may not be better at it than everyone s/he supervises. A supervisor is responsible for:

- Guiding the group towards its goals
- Ensuring that all members of the group are productive
- Resolving problems as they arise.
- Has the authority to change the work roles of those supervised and makes recommendations to hire, fire or promote employees to the next level of management.

Supervisors are differentiated from work or team leaders who assign and direct the work of staff based upon the application of different skills and abilities. A work or team lead possesses demonstrable expertise at the tasks to be performed. A supervisor has to understand the tasks s/he assigns to others but do not need to be an expert at all the tasks performed by those who report to them. At the University, positions officially designated as supervisory must also meet the supervisory criteria outlined in the Higher Education Employee Relations Act (HEERA).

Staff positions provide administrative and professional support within the organization. Position focus is upon individual contributions to organizational goals and objective and includes both administrative and professional positions which include both generalists and subject matter experts.

POSITION PURPOSE

The position overview is a summary statement of the **major purpose** of a position and its role in the department. The **Purpose** statement should be answering the question, "Why does the position exist?" It should not contain an overview of the department's role and importance to the University nor should it include descriptions of specific duties and responsibilities. The position overview should be targeted to the specific position for which it is written.

The purpose statement should clearly indicate the role of the position as well as the reason why the position exists.

Director	Under the general direction of the Associate Vice President directs, leads and oversees the administration of banking and related services used in the management of UC funds.
Program Coordinator	Under the direction of the (<i>unit head title</i>) coordinates program and policy development and review for University health and welfare plans.
Business Manager	Under direction of Associate Vice President, manages all business and support functions for the Department of (<i>name</i>). Major duties include supervision of nonacademic staff, material management, space utilization, preparation and management of departmental budget and fiscal control of contracts and grants
Administrative Specialist	Under the general supervision of (<i>supervisor's title</i>) provides analytical and clerical support for (<i>department name</i>)'s business and financial functions.
___ Assistant III	The incumbent provides administrative support to the Director and staff of the (<i>name</i>) unit.

MAJOR FUNCTIONS AND TASKS

Description of Duties:

- This section of the job description outlines the major functions and tasks assigned to the position as well as the percentage of time spent on each function. Functions are the major responsibilities that represent the primary reason for the position's existence and generally occupy most of the

employee's time. The functions of a position govern its qualification requirements.



STAY WITH THE BIG PICTURE!

- How often do the basic work processes in a job change? Not as frequently as do the minor details, such as the tools used to perform the work, etc. Keep this in mind as you decide on the key elements of a job that need to be captured in a job description.

Function:

- A function is:
- A major subdivision of work performed by one individual or
- A combination of tasks that make up one area of responsibility.
- Most jobs contain 4 functions although they can contain more.

Tasks:

- A task is:
- A task or duty is one of the work operations that is a logical, essential step in the performance of a function.
- A description of what work is done and the expected purpose, result or product.

Frequency:

This is the percentage of time the function is performed. Generally this is an estimate of the amount of time spent on the function over the course of a year. To help think about the percentage, remember that there are 2088 working hours in a year. A function which takes up 25% of the employee's time is therefore being estimated to take 520 hours/year to perform.

Functions assigned to positions should generally be organized from the *most* important (based upon percentage of time spent on the function) to the *least* important. In addition, when revising an existing position description, functions and duties should remain in the same order as in the previous position unless they have been removed or reduced in importance. This not only supports the department's ability to demonstrate change and growth in a position but also allows Human Resources to more easily identify actual changes between old and new position descriptions.

Essential Functions:

Essential functions are the basic job duties that an employee must be able to perform, with or without reasonable accommodation. The criteria of an essential function are:

- The job exists to do this function;

Example: A person is hired to keyboard documents. The ability to keyboard accurately is an essential function, because this is the reason that this position exists.

- There are a limited number of other employees available to perform the function, or among whom the function can be distributed. This may be a factor because there are only a few other employees, or because of fluctuating demands of the department's operation.

Example: A department with a large workforce may have periods of very heavy labor - intensive activity alternating with less active periods. The heavy work flow during peak periods may make performance of each function essential, and limit an employer's flexibility to reassign a particular function.

- A function is highly specialized, and the person in the position is hired for special expertise or ability to perform it.

Example: The position requires, in addition to experience, that the individual to be able to communicate fluently in another language. Fluent communication in the language is an essential function of the job.

WRITING FUNCTION AND TASK STATEMENTS



KEEP IT SIMPLE!

- Statements of functions and tasks are clearest when they include a first person present tense action verb and a noun to define them.
- Use straightforward language in describing functions and tasks. Vague or misleading words serve no purpose. For example, “conducts research” should not be used for “searches files.”
- Phrases that have no meaning outside the immediate office should be avoided or defined. Use non-technical language whenever possible and appropriate.
- Don’t include references to personal qualities or skills.
- *Avoid* statements that rely on adjectives and adverbs or form conclusions and judgments. Function and task statements should be easily understood, quantified and explained. Words and phrases such as “assist in,” “responsible for,” “involved in,” “complex,” “meaningful,” “high impact,” “ability to”, “interest in,” “performs complex tasks,” need to be quantified.
- **Positions are classified is based upon information provided in the questionnaire that demonstrates the types of knowledge needed to perform the work and how knowledge is applied, complexity of assigned issues and projects, freedom to act, position scope and breadth, impact on others and resource management.**

Functions/Tasks:

- When writing functions and tasks do the following:
- List the functions – Jobs usually include four to five functions. Often it’s easiest to make a list of the tasks you wish to have accomplished and then group them into functions.
- List the primary tasks associated with each function
- Estimate the time percentage to be spent on the function
- Note which functions are essential based upon the criteria outlined above.

Examples of Function and Task Statements:

Position: Program Director

Function:

- Oversees all advocacy, communications and fundraising activities for (*program name*).

Tasks:

1. Supervises the design and production of publications, interactive web-site development and maintenance.
2. Mediates relations and interaction with the press.
3. Serves as primary state and national program spokesperson; develops and communicates University perspectives on educational policy issues.
4. Establishes and implements governmental and legislative relations activities to ensure that (*program name's*) success is widely known.
5. Develops and implement a community and public relations strategy geared towards providing information on institutional activities to members of key constituencies including financial investors, institutional partners, students, parents and instructors served, and program alumni.

Position: Technical Manager

Function:

- Leads the structural design and delivery processes for key information technology systems and applications to enhance enterprise-level systems security and client services.

Tasks:

1. Lead and manage the design, plan and implement existing and future server deployments, migrations and upgrades to maximum systems security and efficient desktop management and support.
2. Develop project goals, budget, timeline and staff assignments.
3. Manage resources to optimize work and project delivery.
4. Ensure consistent documentation of systems, processes and procedures.
5. Develop or participate in the development of change management standards, processes and procedures that support effective response to internal issues or externally imposed requirements.
6. Work closely with internal and external clients to ensure a thorough understanding of client business needs and operations requirements.
7. Develop, implement and maintain strategies that will ensure a reliable and secure Windows production environment.

Position: Assistant

Function:

- Communication

Tasks:

1. Compose correspondence/reports for own or manager's signature;
2. Arrange essential mail in priority action order for supervisor/professional staff;
3. Check deadlines on incoming requests and put preliminary work in play;
4. Process replies on own initiative or from supervisor/professional staff member's notes;
5. Research, draft or abstract reports;
6. Attend meetings upon request, take notes and prepare summary minutes.

- Travel

1. Arrange travel through internal or outside agents as appropriate;
2. Prepare itinerary, trip file and supplies;
3. Prepare expense report tools for traveler;
4. Complete expense reports after trip.

- Office Routines

1. Set up "tickler" system;
2. Set up "exception reporting" system to handle routines without supervision;
3. Routinely re-order department supplies;
4. Update mail/phone directories.

PHYSICAL, MENTAL AND ENVIRONMENTAL ISSUES

In order to comply with the Americans with Disabilities Act of 1990 (ADA) which prohibits discrimination against qualified individuals on the basis of disability, it is necessary to specify the physical, mental and environmental conditions of the Essential Duties of the job.

Supervision Received

The amount of supervision a position received (or the position's supervisory controls) determines the incumbent's *freedom to act*. Supervisory controls explain the following:

- How work is assigned
- The employee's responsibility for carrying out the work
- How the work is reviewed.

Supervisory controls also take into consideration the nature of *available guidelines* for performing the work and the judgment needed to interpret/apply the guidelines or develop new ones. Available guidelines include institutional and departmental policies, procedures, practices and precedents, state, federal or industry regulations, industry standards, vendor documentation etc.

How Work is Assigned

This considers how the supervisor defines assignments to the employee. For example, does the supervisor assign most work with detailed instructions on how to do the work; instructions only for new, difficult or unusual aspects of the work, suggestions for procedures to follow or only information about objectives, priorities and guidelines?

Employee Responsibility for Assigned Work

The employee's freedom to act indicates the degree of independence s/he has in making decisions. For example, the employee may work exactly as instructed; refer situations not covered by instructions to the supervisor or manage work independently according to established policies and procedures.

Supervisory Review of Work

The degree and type of supervisory oversight ranges from close and detailed to spot check to general review. In considering supervisory controls, it is not just the degree of independence that is evaluated but also the degree to which the nature of the work **allows** employees to make decisions and commitments and exercise

judgment. For example, clerical employees often perform their assigned responsibilities independently and work receives only a general review. However, the amount of supervision received is evaluated as “close” or “general” because of the limited opportunity to exercise judgment and initiative provided by the nature of the work.

Typically positions within the Professional and Support Staff (PSS) program make decisions which are within the parameters set by policies, procedures, guidelines and/or standards of a specific occupation or professional field as well as those established by institution. Although employees may perform assigned responsibilities with only general oversight, the nature of the work usually restricts opportunities for decisions and judgments to those which are within the bounds of existing policy and procedure. Therefore positions are considered to work under close supervision to general supervision.

Management & Senior Professional (MSP) positions typically make decisions which are broadly subject to functional policies and objectives and general management review. The types of issues addressed frequently have greater breadth and scope and decisions have greater impact on the overall organization. These positions are considered to work under direction or general direction.

Types of Supervision (Job Description Form)

- **Close Supervision:** Incumbent is assigned duties according to specific procedures. Work is checked frequently, and in addition there may be formal training.
- **Supervision:** Incumbent performs a variety of routine duties within established policies and procedures or by referral to the supervisor’s guidelines.
- **General Supervision:** Incumbent develops procedures for performance of a variety of duties; or performs complex duties within established policy guidelines.
- **Direction** - incumbent establishes procedures for attaining specific goals and objectives in a broad area of work. Only the final results of work done are typically reviewed. Incumbent typically develops procedures within the limits of established policy guidelines.
- **General Direction** – incumbent receives guidance in terms of broad goals and overall objectives and is responsible for establishing the methods to attain them. Generally the incumbent is in charge of an area of work, and typically formulates policy for this area but does not necessarily have final authority for approving policy.

JOB DESCRIPTION QUESTIONNAIRE

This section of the job description includes information on the skills, knowledge and experience requirements of the position as well as providing information and examples of how knowledge is applied, the complexity of the problems and issues resolved, the types of analysis and judgments the incumbent must regularly make, accountability for actions and resource management.

The required skills, knowledge and experience for a position are posted when the position is recruited. These requirements serve as the basis for creating the interview questions, selecting the best qualified candidate and both documenting and defending the selection.. All interviewees are required to meet all the posted requirements so it is important that the requirements are realistic, specific and measurable.

Knowledge and Skills:

This section answers two questions:

- What kind and level of knowledge and skills are needed?
- How are required knowledge and skills used in doing the work?

In considering the type of information to be included in the job description, departments need to consider the general characteristics of the work as well as how these characteristics are defined based upon laws and regulations (such as the EEO/AA and the Fair Labor Standards Act). Most jobs at Office of the President fall within one of the three following job categories:

- **Professional Work:** Professional work requires knowledge in a field of science or learning which is characteristically acquired through formal education or training equivalent to a bachelor's degree or higher with major study in a specialized field as opposed to general education. The Fair Labor Standards Act calls these "learned and creative professional positions." Examples of professional work include medicine, nursing, counseling psychology, accounting, actuarial computation, engineering, education, and various types of physical, chemical, and biological sciences and when it requires the exercise of judgment and personal responsibility for the application of an organized body of knowledge that is constantly studied to make new discoveries and interpretations and to improve data, materials and methods.
- **Administrative Work:** Administrative work involves the exercise of analytical ability, judgment, discretion and personal responsibility and the application of a substantial body of knowledge of the principles, concepts and practices applicable to one or more fields of administration or management. While these positions do not require specialized education they do involve the

type of professional skills (analytical, research, writing, judgment) typically gained through a college level education or through progressively responsible experience.

- **Clerical Work:** Clerical work is in support of office, business or fiscal operations, is performed in accordance with established policies, procedures or techniques and requires training, experience or working knowledge related to the tasks to be performed. Work typically involves general office or program support duties such as preparing, receiving, reviewing and verifying documents, processing transactions, maintaining office records, locating and compiling data or information from files, keeping a calendar and informing others of deadlines and other important dates, using keyboards to prepare typewritten material or to store or manipulate information for data processing use. The work requires knowledge of the organization's rules, some degree of subject matter knowledge and skill in carrying out clerical processes and procedures.

Measurability

- Skills, knowledge and abilities also need to be objective and measurable. An employee or job candidate cannot be assumed to possess required abilities required to perform assigned work; it must be demonstrated based upon their education and behavior in previous jobs. Ensuring that requirements are quantifiable not only ensures that employees are treated fairly but also serves as a demonstration of the University's good faith efforts in regards to affirmative action and equal opportunity as required by law.
- Typically requirements include education and experience as well as the skills and abilities that would be necessary for an individual to possess in order to successfully perform the functions assigned to the position. Any licenses or certifications required by law or regulation to perform the position must also be included. Skills and abilities listed should include technical skills and abilities as well as interpersonal effectiveness, communications and time management.
- Typical educational requirements by position type include:
 - Professional positions BA degree in a related discipline
 - Administrative positions BA degree in a related discipline
 - Clerical positions: high school diploma or equivalent

Managerial positions frequently require one or more years of managerial experience in addition to occupational experience. Occupationally-related experience may substitute for education unless the position requires licensing or certification only

attainable through a formal degree program (e.g. licensed architects, lawyers, psychologists, MFTs, doctors, teachers, phlebotomists, etc.)

- Examples of standard education/experience requirements for exempt administrative professionals based upon market leveling guidelines are as follows:

• Entry Level	• 0-2 years related experience with BA
Intermediate Level	3-5 years related experience with BA; 1-3 years related experience with MA/MBA or equivalent
Senior (Career) Level	6-9 years related experience with BA; 4-7 years related experience with MA/MBA or equivalent

Knowledge Modifiers:

- General Knowledge: The ability to use a source to find specific information as well as familiarity with information contained in source documents or covered in a subject field. (e.g., a general knowledge of UC Staff Personnel Policies refers to the knowledge of the purpose of the rules, the general subjects covered and how to reference the rules.)
- Working knowledge: The ability to recall important and commonly used information from the source.
- Thorough knowledge: A thorough understanding of all information contained in the source. (e.g., using the Personnel policy example, the person is expected to know the provisions of all rules in detail without having to look them up, including rules not commonly used.)

Examples of Knowledge and Skills Requirements:

- Job Requirements from a Senior Professional Position:
- Education equivalent to a bachelor's degree in finance, business, communications or a related field or an equivalent combination of education and experience and 5-7 years of progressively responsible administrative and managerial experience, preferably in higher education.
- Demonstrated ability to function effectively in a collective bargaining environment of distributed leadership from a university-wide perspective.
- Demonstrated thorough understanding of the University's mission, organizational structures, operations, programs policies, and OP and campus administrative structure as well as broad knowledge of current issues impacting the University of California.
- Extensive knowledge of university policies, procedures and practices related to budget administration, accounting, payroll, purchasing, human resources policies and procedures, organizational development processes and change management practices.

- Demonstrated ability to focus on key issues, research, gather and integrate information and participate with others across organizational lines in developing a wide range of qualified resources and data as the basis for formulating recommendations and developing approaches to resolving issues and problems.
- Demonstrated ability to be proactive, creative and innovative in solving problems and issues.
- Demonstrated project management skills including the ability to adapt to constantly changing priorities in managing a wide range of projects.
- Demonstrated ability to work well in teams and independently and to communicate effectively with staff at all levels of the organization both orally and in written form.
- Excellent oral communications skills which demonstrate the ability to effectively convey and explain information and tactfully deal with diverse people, situations and ideas.
- Excellent written communications skills which demonstrate the ability to draft clear, concise and specifications, documentation and reports.

Job Requirements from a Technical Unit Manager Position:

- Education or experience equivalent to undergraduate degree in computer science or a related field or an equivalent combination of education and experience and eight years of programming/systems analysis experience that includes a minimum of four years experience in a supervisory capacity.
- Demonstrated expertise with Citrix, Exchange, AD, SMS, and MOM. Comprehensive understanding of the Windows server operating system and applications as demonstrated through Microsoft coursework and/or certification as well as work experience.
- Demonstrated experience with Intel-based PC hardware and with networking hardware and concepts preferred.
- Demonstrated possession of conceptual and logical abilities, strong planning and project abilities, excellent oral and written communication skills, excellent interpersonal skills, and the ability to work calmly and effectively in situations under pressure and to manage time effectively in a changing environment.
- Experience managing and motivating skilled and knowledgeable staff in a technical environment with concurrent tasks, changing priorities and resources utilizing work and project plans to meet deadlines.
- Excellent customer relationship skills and commitment to providing high-quality services, as demonstrated by the ability to develop collaborative, productive partnerships with customers both inside and outside the department that result in continuing and new service requests and high evaluations.
- Excellent oral communications skills which demonstrate the ability to effectively convey and explain information and tactfully deal with diverse people, situations and ideas as well as excellent written communications skills

- which demonstrate the ability to draft clear, concise and specifications, documentation and reports.
- Demonstrated ability to work as a leader in a collaborative environment, build consensus and promote the exchange of information among technical collaborators and clients.

Job Requirements from a __ Assistant Position:

- High school diploma or an equivalent combination of education and experience as well as 2-3 years of progressively responsible administrative experience required, preferably in a University setting.
- Demonstrated ability to focus on key issues, research and consider/recommend reasonable alternatives. Demonstrated ability to seek and gather information from a variety of sources including electronic media and the Internet.
- Demonstrated ability to track, organize and prioritize workload and request resources and information needed to do the job.
- Excellent attention to detail, as demonstrated by regularly verifying all work thoroughly to ensure accuracy and ability to recall specific facts quickly and efficiently.
- Written communications skills that demonstrate the ability to draft correspondence, edit, proofread and prepare documents in an appropriate format and oral communications skills that demonstrate a professional demeanor and the ability to interact with others with discretion and tact.
- Demonstrated ability to use common sense and correctly determine what is appropriate to a given situation
- Thorough knowledge of the Microsoft Office suite of software and experience in effectively using Word, Excel, and PowerPoint to create documents, reports and presentations.

Professional and Technical Knowledge:

This section of the questionnaire responds to the question of how required knowledge and skills used/applied in doing the work. This is not a re-statement of the skills and knowledge necessary to perform assigned work but should be a supporting explanation of how the skills listed in the Job Requirements section apply to the work performed.

- Information provided should include a description of the depth and importance of knowledge acquired through formal education; certification processes and/or experience necessary. Departments should also include one or two specific examples of work assigned to this position that show how the concepts, principles and practices of the occupation or professional discipline are expected to be applied by the position's incumbent.

Required Knowledge of Institutional Policies, Procedures, Rules and Practices:

Describe the types of institutional knowledge required to perform assigned work. Departments should include a specific example of work assigned to this position that show how institutional policies and procedures be applied by the position's incumbent.

Innovation/Creativity:

This section is really about the complexity of the work performed and the types of approaches used to perform the work. This may range from the application of standard approaches and techniques which are applied to problems with few variables to performance of work where issues and priorities are not well defined and require investigation to supplement available facts as well as to provide a basis for definition and resolution of the problem. This also may include the need to assess unusual circumstances, variations in approach or incomplete or conflicting information.

The level of difficulty and originality increases when the employee must consider differences in courses of action and refines methods or develops new techniques, concepts, theories or programs to solve problems.

List one or two specific examples that show the types of issues addressed, analytical skills applied and solutions recommended or implemented.

Judgment/Decision-Making:

This should include an explanation of the type of planning, problem-solving, evaluation, reasoning and influence that the incumbent regularly exercises in performing assigned work. Information provided in this section should also include an explanation of the types of guidelines used in performing work and how much judgment is needed to apply the guidelines effectively in resolving issues or problems. For example, work may be performed using guides such as handbooks, policies, procedures, regulations and/or precedents. Many professions have standards and rules with which the University must comply. This section supports the information provided in the section on Innovation/Creativity.

List one or two specific examples that show the types of interactions and influence exercised as well as the types of judgments or decisions the incumbent makes or recommends.

Personal contact information also supports information provided in this section.

Personal Contacts and Purpose of Contacts

The contacts list provides information about personal contacts outside the position's regular workgroup as well as the purpose of contacts. Contacts are those made face-to-face or by telephone. Describe contacts in terms of the work relationship and explain the purpose of the contact as well as how regularly contact is made. Examples of contact purpose include giving or exchanging information, to resolve problems, to provide service, to motivate, influence or gather information, or to justify, defend or negotiate matters.

Accountability:

This section is used to describe the implications of actions and decisions made by the employee. Accountability should be carefully aligned with the level and types of judgment exercised and the level of supervision given the position. This means explaining the types of decisions the individual regularly makes, the types of consultation required as part of the decision-making process, the types of guidelines which are available to help the incumbent make a decision or determination and what happens (institutionally and personally) if an error is made. In an environment such as the University, very few individuals are authorized to make commitments on behalf of the entire organization and frequently decision-making processes are collaborative and/or shared. Therefore, it is just as important to outline to whom and with whom the position makes recommendations and for whom analyses and reports are prepared.

The description should include how the individual's judgments influence the purpose of the work (work objectives) performed by the position as well as the impact of the position's work products. The impact of the work product or service identified and who or what benefits from the position's work and how this benefit is realized.

List one or two specific examples of decisions and whether the employee was responsible for making or participating in the decision. Include information on the impacts/outcomes of those decisions upon the department and/or institution as well as the probably results of an erroneous decision.

Resource Management:

This section demonstrates the extent to which an employee has *direct* responsibility for human, financial, space, facilities, information and/or material resource management. Information should only be included for resources over which the incumbent has measurable, direct authority.

For example, budget responsibilities should list only those fund sources for which the incumbent has direct decision-making authority or employees for whom the position has direct supervisory responsibility (as defined by the authority for interviewing and hiring, assigning tasks, approving overtime, performance evaluation and merit increases and disciplinary actions) or indirect supervisory responsibility through a subordinate supervisor.

Where incumbents do not have direct resource management responsibilities, it is helpful to include examples that demonstrate the scope and breadth of influence exercised in regards to resource decisions in other sections of the questionnaire (Innovation/Originality/Judgment/Accountability). For example, responsibility for functions which involve influencing others to make significant expenditures of university funds in a specific manner (systemwide purchases of library books and digital materials, hardware and software, negotiation of campus construction budgets with external entities etc.)

POSITION CLASSIFICATION

Positions undergo classification review prior to recruitment, or as part of organizational change or job restructuring. Frequently changes to one position have an impact upon others in which case all impacted positions should be updated and submitted for classification review simultaneously.

Classification decisions are based solely upon the responsibilities and duties assigned to a position, including the skills, knowledge and abilities required of the position. The overall credentials and personal circumstances of the incumbent are not considered in making a classification decision. Put simply, Compensation classifies the job, not the incumbent or potential candidate. Compensation receives frequent inquiries about classification. The most common misconception involves confusion about this person-position distinction. Examples of person-related factors that are not considered in job classification include:

- Performance
- Longevity
- Unusual qualifications (for example, professional certifications) not required to perform the job duties
- Retention issues
- Financial needs
- Increased workload or volume of work
- Future projects

Types of Classification Reviews

Direct Replacement: This is a previously established position for which a department wishes to recruit and where only minor changes have been made to the duties assigned to the position.

New or Restructured Position: This is a position which has either not previously existed or an existing position which has undergone significant restructuring. Since there is no history to the position it must be established within the classification system.

Reclassification (single position): Reclassification is appropriate when there have been significant changes to a majority of an individual employee's assigned responsibilities that impact a number of factors (nature or type of work performed, level of responsibility, impact of the position on the unit, department or campus, reporting relationships, scope of duties, complexity of work etc.) In cases where newly assigned duties to the position under review are already part of an existing

position, the second position will also need to be updated and submitted for review. Departments need to be aware that employees do have a right to the duties assigned to them and when duties are removed from a position they need to be replaced with duties at a similar level and the second position submitted for review along with the one identified for reclassification.

Reclassification based upon Organizational Change: When a unit undergoes reorganization, the changes may impact the classification of several positions. The review process is similar to that of reclassification of a single position, however, the impacts of change across the organization and the redistribution of duties across a larger group of positions is considered. Departments need to be aware that employees do have a right to the duties assigned to them and when duties are removed from a position they need to be replaced with duties at a similar level. All affected positions should be submitted for review and classification.

MSP Committee: Management and Senior Professional (MSP) positions at MSP IV and above are reviewed by the MSP Committee. A call for positions to be reviewed is sent out quarterly by Human Resources. Positions must be submitted through the applicable Divisional office by the deadline noted in the call letter.

Required Materials

- The following documents and information should be provided to Compensation as part of the submission of the job through the Classification and Applicant Tracking System (CATS).
- Job Description
- Memo that includes the following:
- Reason for request (establishment of new programs or services within the University, staffing changes that have provided an opportunity for job restructuring, growth within existing position etc.)
- Changes to the position(s) which the department believes impact the position's level. Typically this includes not only a description of the new or revised duties but also how the changes impact applied knowledge breadth, scope and organizational. The cover memo should also clearly identify duties that have been added or removed, the origin of new duties and the disposition of removed duties.
- Current Departmental Organizational Chart which shows the position. Organization charts showing only the specific unit do not provide sufficient information.

Process Timelines

Upon receipt of a *completed, finalized classification package*, the assigned Compensation Analyst will strive to make the classification decision as soon as possible. Classification timelines are based upon the complexity of the action under review and overall volume of work in the unit.

Review Type	Timeline
Direct Replacement	7-10 days
New Positions	21-30 days ¹
Reclassification (single)	*varies based upon Compensation workload
Reclassification (multiple positions based upon reorganization)	*varies based upon Compensation workload
MSP Committee	Typically 3-4 months; MSP Call materials include the meeting date. Positions for recruitment may be expedited through an MSP Poll.

Impacts on Process Timelines

- A number of factors can impact review process timing. These include:
 - Submission of a classification package without appropriate review. Divisional review and approval may also be required and it is important for departmental staff to be aware of divisional processes, procedures and requirements prior to submitting a position to HR.
 - Missing materials
 - Job descriptions that:
 - are not clearly written;
 - have “mapping” issues; i.e. duties have been reorganized and reworded, duties have been re-delegated to or from other positions without acknowledgement or duties over-lap with other existing positions;
 - don’t reflect the nature of the work performed.

¹ It is important for departments to anticipate the time that will be required to revise the job description, prepare the classification package, and provide all appropriate parties (department head, divisional staff as appropriate) with time to review the proposed action *prior to formal submittal* to Compensation.

DESCRIPTION WRITING TOOLS

Competencies and Behaviors

- Skills, knowledge and abilities are quantified through the identification of behavioral competencies. These are the (non-physical) behavioral skills demonstrated by what the employee does as well as how and why Behavioral competencies translate facts and accomplishments into behavioral terms.
- The following information is often used as the basis for defining job requirements and setting performance standards based upon assigned duties.

Communications Skills

Reading:

- Demonstrated ability to read English words, simple sentences and numbers on documents so they can be properly filed.
- Demonstrated ability to read documents written in Standard English text (e.g., administrative policy manuals).
- Demonstrated ability to read (technical, legal or scientific) documents to . . .

Writing:

- Demonstrated ability to write grammatically correct routine business correspondence such as brief transmittal memoranda, letters and correspondence.
- Demonstrated ability to write concise, logical, grammatically correct analytical reports.
- Demonstrated ability to write technical reports on _____ that are suitable for publication in professional journals.
- Excellent written communications skills as demonstrated by the ability to draft correspondence, letters, memos and reports and edit, proofread and prepare documents in an appropriate format

Speaking:

- Excellent oral communications skills that demonstrate a professional demeanor and the ability to interact with others with discretion and tact.
- Demonstrated ability to speak on a one-to-one basis using appropriate vocabulary and grammar to obtain information, explain policies, procedures, etc. and/or persuade others to accept or adopt a specific opinion or idea.
- Demonstrated ability to make oral presentations to persuade others to accept a specific opinion, action, etc. and/or provide information or explain procedures, policies, etc.

- Ability to speak or write with ease, clarity and impact as demonstrated by the ability to explain complex ideas easily and effectively using a communication style suited to the subject and audience.

Interpersonal Skills

Adaptable:

- Ability to adjust easily to new or changing circumstances as demonstrated by the ability to shift easily among competing tasks to meet deadlines.
- Demonstrated ability to modify own behavior in response to needs of others and adjust readily to various groups or work situations.

Assertive:

- Demonstrated ability to state own opinions and ideas confidently without infringing on others.

Collaborative:

- Ability to work collaboratively with colleagues and clients as demonstrated by finding common ground in completing tasks and solving problems.
- Ability to work collaboratively with others as demonstrated by seeking input from colleagues and clients in order to make informed decisions.

Develops Others:

- Coaches or instructs others to improve their performance as demonstrated by the regular provision of positive, encouraging and informative feedback.
- Demonstrated ability to establish rapport and gain the trust of others through active listening.
- Ability to coach others as demonstrated by the regular provision of clear objectives, expectations and feedback to those supervised.

Diplomatic:

- Ability to deal tactfully with diverse people, situations and ideas as demonstrated by decisions which considers the impact upon others (other organizations etc.) before taking action.
- Demonstrated ability to handle sensitive information with discretion and tact.

Ethical:

- Ability to act with integrity as demonstrated by regularly representing information accurately and honestly, dealing with others fairly and maintaining high standards of conduct despite pressure.

Independent:

- Ability to function effectively without assistance or direction as demonstrated by regularly undertaking new tasks with minimum instruction or feedback.

Networking Skills:

- Builds and maintains networking skills as demonstrated by the ability to interact with others in a consistently positive manner, relate to a wide array of people and develop/use contacts to improve job performance.

Risk-taker:

- Ability to take calculated risks to gain rewards as demonstrated by the ability to act decisively even when the outcome is uncertain.

Self-confident:

- Demonstrates belief in own abilities and/or skills by undertaking difficult tasks with the expectation of success.

Team player:

- Works well within diverse groups to achieve common goals as demonstrated through support for team ownership of projects to ensure results.
- Works well within diverse groups to achieve common goals as demonstrated by supporting group goals over personal gains or using ideas or suggestions from others to improve productivity.

Intellectual Skills

(Handles) Ambiguity:

- Ability to deal confidently with unclear or changing situations as demonstrated by the ability to deliver results under rapidly or continually changing circumstances.
- Demonstrated ability to switch gears easily in response to unexpected demands.
- Demonstrated ability to work well in an unstructured environment and deal successfully with conflicting priorities to meet deadlines.
- Demonstrated flexibility in accommodating changing priorities and making sound decisions when faced with unclear situations.

Analytical:

- Ability to draw conclusions from data in a logical, systematic way as demonstrated by apply logic to problems, situations, practices or procedures to define the issue or objective, identify relevant concerns or factors, identify patterns, tendencies and relationships, formulate objective conclusions which take into account the various alternatives and their implications.
- Demonstrated ability to focus on key issues, research, gather and integrate information from a variety of sources and consider/recommend reasonable alternatives.

Classification:

- Demonstrated ability to systematically arrange data or information into groups or categories according to established criteria.

Decisive:

- Ability to act quickly and confidently as demonstrated by regularly dealing promptly and appropriately with difficult problems and issues.

Detail-Oriented:

- Attention to detail, as demonstrated by regularly verifying all work thoroughly to ensure accuracy and ability to recall specific facts quickly and efficiently.

Information Seeker:

- Ability to thoroughly investigate situations or issues to get relevant information as demonstrated by seeking out a variety of perspectives and asking probing questions to obtain facts before making decisions.

Innovative:

- Skill in using original thinking to generate new ideas and solutions as demonstrated by inventiveness and imagination in recommending ways to handle new or difficult tasks.

Judgment:

- Ability to form sound opinions and make solid decisions as demonstrated by the use of common sense to determine what is appropriate to the situation.
- Demonstrated ability to focus on key issues and evaluate all aspects of a situation before acting.

Organized:

- Ability to work and think in a methodical and logical way as demonstrated by planning assignments and monitoring performance according to priorities and arranging work schedule to meet critical deadlines.

Problem Solver:

- Effectively identifies and solves challenging problems as demonstrated by regularly reviewing issues for their underlying cause(s) and recommending solutions which may have been overlooked by others.

Quick Study:

- Ability to master situations or information easily and quickly as demonstrated by the regular comprehension of new tasks and situations with lamentsed direction or training.

Strategic Thinker:

- Anticipates and prepares for future events and outcomes as demonstrated by the development of plans to leverage resources, the regular anticipation of likely responses to different initiatives and consideration of the potential effect of future events upon current plans.
- Regular practice of examining issues and plans with a long term perspective.

Self-Management/Motivational Skills

(Wants a) Challenge:

- Motivated by difficult assignments and new challenges as demonstrated by willingness to learn new things and assumption of tasks beyond current skill level.

Continuous Learner:

- Driven to learn and stay current professionally as demonstrated by regular solicitation of feedback and constructive criticism, translation of mistakes into lessons learned.
- Regularly seeks new knowledge both in and out of professional field.

Customer Oriented:

- Attentive to customer needs as demonstrated by responsiveness to customer requests, initiation of informal meetings to build relationships and listening to/anticipating customer needs.

Enthusiastic:

- Shows a lively and genuine interest in work as demonstrated by regularly approaching difficult projects with energy and enthusiasm and responding to setbacks in a positive manner.

Initiative:

- Acts proactively to achieve results
- Demonstrates willingness and ability to take first step with minimal or no direction
- Does more than is expected and before being asked.

Persistent:

- Perseveres in spite of opposition or difficulty as demonstrated by coming up with a variety of approaches to reach a goal.
- Demonstrated commitment to completing tasks despite obstacles

Quality Commitment:

- Maintains high personal work standards and avoids short-cuts that may adversely impact quality.

Resourceful:

- Ability to find alternative solutions to overcome problems or limitations as demonstrated by finding additional resources when limited by time, budget or staffing levels.
- Leverages the experience, expertise and work of others.

Self-Motivated:

- Regularly undertakes new tasks without direction
- Regularly achieves results with minimal supervision or feedback

Functional Verbs

The following list of verbs are provided to help you develop your job descriptions. They are grouped alphabetically by "Idea Packages."

<p><u>ADMINISTRATIVE ACTION</u></p> <p>Advise Administer Appoint Approve Authorize Control Coordinate Consult Decide Delegate Determine Direct Enforce Establish Execute Initiate Manage Order Organize Plan Reject Require Return Review Supervise Train</p> <p><u>HELPERS</u></p> <p>Advise Aid Cooperate Counsel Explain Guide Instruct Participate Protect Serve Show Suggest</p>	<p><u>ANALYZE OR APPRAISE</u></p> <p>Appraise Analyze Ascertain Check Compare Consider Criticize Develop Evaluate Examine Forecast Identify Inspect Interpret Interview Investigate Measure Plan Rate Read Research Resolve Review Solve Study Summarize Survey Test</p> <p><u>PUSH ALONG VERBS</u></p> <p>Activate Encourage Expedite Further Implement Maintain Motivate</p>	<p><u>GET AND GIVE</u></p> <p>Accept Accumulate Acquire Arrange For Buy Collect Compile Deliver Distribute Exchange Forward Furnish Gather Get Give Inform Inquire Issue Keep Mail Make Available Notify Obtain Pick-Up Procure Provide Pull Purchase Recall Receive Recruit Render Request Report Secure Sell Send Solicit Submit</p>	<p><u>GET AND GIVE (continued)</u></p> <p>Supply Take Transfer Withdraw</p> <p><u>CREATIVE</u></p> <p>Create Design Devise Develop Establish Estimate Forecast Formulate Initiate Install Originate Plan Project Schedule</p> <p><u>CONTROL</u></p> <p>Audit Check Conserve Control Delete Edit Enforce Ensure Guarantee Inspect Prevent Regulate Restrict Review Verify</p>
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Verb Definitions

It is important that stated job functions are similarly interpreted by the description writer as well as the job evaluator. The following list is intended to provide you with "working definitions" for commonly used verbs to ensure clarity amongst many readers and prevent the use of indefinite or ambiguous expressions.

Adapt	Modify or change to fit specific or new situations.
Administer	Manage or direct. (Generally requires some additional explanation to show specific detail. See "manage.")
Advise	Offer an informed opinion or give specialized information to others.
Analyze	Identify the elements of a whole and critically examine and relate these component parts separately and/or in relation to the whole.
Allocate	Assign or apportion for a specific purpose or to a particular person.
Appraise	Judge as to quality; compare critically with established standards.
Approve	Exercise final and decisive authority, causing action to use money, manpower, materials, or equipment.
Assemble	Gather from various sources.
Assign	Specify or designate tasks and duties to be performed by others.
Authorize	Approve or commit an act implying subsequent action by others.
Commit	Pledge or assign to a particular course of action.
Compile	Put together information or assemble data in a new form.
Conduct	Manage or carry on, with emphasis on concept of immediate supervision or personal leadership.
Control	Direct, regulate, or guide the use of money, methods, equipment, and materials. Also, the process of monitoring activities to ensure conformance with planned results.
Cooperate	Act jointly with others.
Coordinate	Regulate, adjust or direct the related actions of others in order to attain desired results.
Create	Produce through imaginative skill.

VERB DEFINITIONS continued

Delegate	Entrust to another person tasks or duties that require exercise of some authority of the person originally responsible, as "to delegate an administrative assistant to represent the department at conferences.
Develop	Disclose, discover, perfect, or unfold a plan or idea in detail, gradually. Implies study and/or experiment unless otherwise stated. When used as "to develop subordinates," see train.
Devise	Form in the mind by combinations of ideas, new applications of principles, or new arrangements of parts.
Direct	Govern or control work operations by establishing and implementing objectives, practices, and methods.
Estimate	Forecast future quantities, values, sizes, extents, etc., either on the basis of judgment or calculations. Frequently, estimating is shared with others, in which case it is more precise to use "estimate" as a noun and to state the job's function in relation thereto, i.e., originates, analyzes, approves, etc., estimates of...
Execute	Put into effect or carry out methods, plans, etc..
Forecast	Predict future events based on specified assumptions.
Implement	Carry out or fulfill by taking action.
Improve	Make better.
Inform	Communicate knowledge to others.
Initiate	Set in motion or introduce.
Inspect	Examine materials, equipment, reports, work, etc., to determine quality, suitability for use, etc..
Instruct	Teach, demonstrate, or by other methods impart knowledge to others. Direct that a specific activity be performed; may include directing how it is to be performed.
Interpret	Explain to others (orally or in writing) the meaning or significance of something.
Investigate	Uncover facts by systematically finding them, conducting a searching inquiry, and examining various sources.
Maintain	Keep in satisfactory condition.

VERB DEFINITIONS continued

Manage	Plan, organize, direct, control, and evaluate operation of an organizational unity, with responsibility for the output.
Negotiate	Confer with others to reach an agreement.
Originate	Begin or initiate.
Oversee	Supervise a function or operation as distinct from supervising people.
Propose	Recommend or suggest for consideration or adoption.
Recommend	Present a matter for action or approval.
Research	Specific inquiry involving prolonged and critical investigation, having for its aim the study of new facts and their interpretation, the revision of accepted conclusions or theories that may be affected by newly discovered facts, or the practical application of such new or revised conclusions. Example: Technical research to develop new products for the organization.
Review	Consider or examine facts or results for accuracy, completeness, and suitability.
Select	Choose that which appears to be best suited for a specific purpose.
Specify	State precisely, or in detail, or name explicitly. Frequently, the function of specifying is shared with others, in which case it is more precise to use the noun "specification" and state a job's function in relation thereto; i.e., originates, analyzes, approves, etc., specifications for . . .
Study	Apply thought to any subject of investigation, in order to arrive at the most suitable conclusion.
Supervise	Personally oversee or control work performance and conduct of others, where there is opportunity for control or inspection of work performed.
Train	Teach, demonstrate, or guide others in the performance of assigned work.

Physical Demands

When indicating a job-related physical activity, it is necessary to specify the % of time per workday the job requires the employee to perform the activity using the following guidelines.

Rarely	Seldom	Occasionally	Frequently	Continuously
Up to 5 minutes of total work time.	6-29 minutes daily	30 min – 2 ½ hrs per day	2 ½ - 5 ¼ hrs per day	5 ¼ hr or more per day.

Job-Related Physical Activities

Stand	Maintaining the entire body in an erect posture without change in location.
Sit	Resting of the body weight in a seated position while engaging in a single activity
Walk	Moving the entire body from one location to another using a heel to toe gait.
Carrying	To hold or rest weighted objects (<i>indicate weight</i>) directly on hands, arms, shoulders, or back while walking from one location to another.
Pushing	Exertion of force on or against an object (<i>indicate weight/size</i>) to move it from one location to another.
Pulling	Exertion of force to draw an object towards oneself in a particular direction or position.
Climb	Ascend/descend with gradual or continuous progress by oneself, using both hands and feet.
Balance	To maintain body equilibrium on narrow or inclined surfaces.

JOB-RELATED ACTIVITIES continued

Bending	Flexion of the upper trunk forward while standing and knees extended or knees flexed when sitting.
Stooping	Flexion of the upper body forward at the waist with partial flexion of the knee.
Kneel	Maintaining the body in an erect posture while resting body weight on one or both knees.
Crouching	Bending downward and forward by bending the legs and spine.
Reaching	Extending the hands and arms in any direction.
Crawl	Moving body slowly in a prone position on hands and knees flexion, with arms extended and elbows bent.
Squat	Maintaining the body in an erect position with full flexion of the knees.
Trunk Twisting	Rotation of the neck or trunk to the right or left from a neutral position while sitting or standing.
Handling	Flex and extend fingers with opposition of thumb using the palms, fingers and thumbs to grasp or manipulate objects. To examine as by touching, feeling or moving an object.
Handle	To maneuver objects in a gross manner, to manipulate or reposition medium sized to large items. The treatment of packaging and shipping of an object or material. Has handles to be grasped by the hands in order to manage dexterously or efficiently, e.g., large bag of trash, move furniture, cases/boxes with handles.
Grasping	To handle, clasp or embrace with both arms, hands, fingers. To take or to seize eagerly, e.g., bag of feed, fertilizer, seed, cement
Manipulate	To operate, manage, control, or utilize skillfully with the hands. Adroit handling, e.g., steering wheel, hand truck, pallet jack.
Fingering	To individually, or as a group, flex and extend fingers for fine and precise manipulation of small items, or to activate a keyboard mouse. Handling or touching with the fingers, e.g., turning switches on/off, using a telephone push button or 10-key calculator.

Environmental Conditions

Inside	Protection from weather but not necessarily from temperature changes.
Outside	No effective protection from weather.
Extremes of Cold	Temperature sufficiently low to cause marked bodily discomfort unless the employee has exceptional protection.
Temperature and Changes	Variations in temperature which are sufficiently marked abrupt to cause noticeable reactions.
Wet	Contact with water or other liquids.
Humid	Atmospheric conditions with moisture content sufficiently high to cause marked bodily discomfort.
Noise	Sufficient noise, either constant or intermittent, to cause marked distraction or possible injury to sense of hearing.
Vibration	Sufficient vibration to cause bodily harm if endured day after day.
Fumes	Smoky or vaporous emissions, usually odorous, thrown off as the result of combustion or chemical reaction.
Odors	Unpleasant smells.
Gases	Examples include carbon monoxide and ozone.
Dust	Airborne particles of any kind, such as textile dust, wood, silica and asbestos.
Hazards	Conditions where there is danger to life, health or bodily injury such as closeness to moving mechanical parts; working on scaffolding and high places; exposure to burns, radiant energy, explosives, toxic chemicals, biological agents and electric shock.