Human Resources

Training

Position Description Guide

Classified Employees

Ver. 2

THE POSITION DESCRIPTION

INTRODUCTION AND PURPOSE

Introduction

The position description (PD) is the primary document of personnel administration in the State. It is basic to:

- designing a job,
- allocating it to a classification,
- identifying type of service,
- recruiting to fill a vacancy,
- complying with Equal Employment Opportunity Commission (EEOC) regulations,
- identifying Essential Functions of the job required by the Americans with Disabilities Act (ADA),
- deciding Fair Labor Standards Act (FLSA) status,
- communicating job duties to an employee,
- establishing performance standards, and
- in completing a performance evaluation.

A good, up-to-date PD prevents many assignment-related or classification grievances. A well written PD allows the administrative processes of Human Resources management to function smoothly and efficiently.

Purpose

The fundamental purpose of the PD is to describe the specific work assigned to a position. It clearly states the tasks, authority and responsibilities that go together to make up a job.

Good PD's give complete statements of the assigned duties, identify actual guidelines, explain how the employee uses them, give examples of typical decisions and the extent and nature of regular, recurring work contacts.

WRITING THE POSITION DESCRIPTION

The Writer

Management is responsible for consistently well written PD's. An integral part of a manager's responsibility is to define and describe work. The employee may review and clarify as needed for accuracy and mutual understanding of the assigned work; however, Managers assign duties and responsibilities to individual jobs.

Ideally, the first line supervisor writes the PD's for positions they supervise. This allows the person most familiar with what needs to be done to decide the job structure of the unit. Once written, the reviewer (i.e. Director, VP) should review the completed PD for program consistency and effectiveness.

Human Resources staff then reviews the PD for completeness and clarity. They will confirm the proper classification allocation for a new position or assure that the position remains properly allocated when duties are revised. They also confirm the inclusion or exclusion from collective bargaining and FLSA exemption status.

After these reviews, an Appointing Authority (or designee) signs it. This is the official who has the authority formalize “employment actions” (such as assigning work) for the agency. A PD is not an approved assignment of work until signed by the agency's Appointing Authority (or designee).

Summary of Steps

1. Management describes, defines, assigns work in writing the PD
2. Employee reviews the PD for clarity and accuracy
3. The Reviewer reviews the PD for program consistency and effectiveness
4. Human Resources staff review the PD for completeness, clarity, allocation, and various position status issues (optional)
5. Appointing Authority (or designee) approves the finalized PD

The Position Description Form

Western Oregon University uses two standard position description forms. The Classified Position Description Form and the Unclassified Professional Staff Position Description Form. Each of these PD Forms are posted on WOU’s Human Resources web page.

Instructions for each section in the Position Description Form are specific. The various sections ask for different but interrelated pieces of information about the job. To present a thorough picture of the job, respond directly to each specific item.

For example, in the Classified Position Description Form, Sections #2 (Program and Position Information) and #3 (Description of Duties) ask for different but related pieces of information about the position. These sections provide a view of the position regarding the program in which it exists and a summary of the purpose of the position (Section #2), and the specific duties and responsibilities assigned to the position (Section #3). In completing these sections, the writer should take care to provide the specific information asked for in each section. Similarly, thorough responses to Section #5 (Guidelines) and Section #7 (Job Related Decision Making) also provide needed information about the position.

Gather the Facts

The supervisor's knowledge of the work assigned to the position is the primary source of information for the PD. Secondary sources of data are in organizational charts, current PD's (in the same or other program areas), and the Human Resources Office. A critical component in revising PD is to resolve any contradictions between the work assigned by the PD and the work actually being performed by an employee. The Human Resources Office can assist in this by conducting a Desk Audit if needed.

To Begin

The writer's task is to list the primary job duties, and to describe for each:

1. What the position **does**
2. **To who or what** the position does it
3. And **what is the out put or result**

<u>For Example:</u>

- Records – Proceedings – To create a permanent record.
- Examines – Patients – To diagnose their condition.
- Searches – Files – To retrieve historical information.

Keep It Simple

Avoid unnecessary use of:

- Multi-syllable words
- Overly long sentences
- Jargon
- Acronyms

Examples:

<u>Poor Statements</u>	<u>Good Statements</u>
Assist with programs including orientation activities, conferences, ISO and MSU activities; and with implementation of ESL programs.	Assist with annual programming including orientation activities, conferences, International Student Organization (ISO) and Multicultural Student Union (MSO) activities; and of short term English as a Second Language (ESL) programs.
Monitors and ensures compliance with MSDS requirements to ensure safety of all custodial and housekeeping activities.	Inspect custodial cleaner inventory and storage for Materials Safety Data Sheet (MSDS) and Hazard Communications program compliance.

Examples:

Task Statement	**Does What (*Action Verb*)**	**To Whom (*Object of Verb*)**	**For What Purpose/Output (*A Product or Service Result*)**	**How, Where, Machines, Equipment, Tools, and/or Processes**
Proof reads grantee's application for clarity of language, appropriate signatures, completeness of information and figures.	Proofreads	Grantee's Application	For clarity of language, appropriate signatures, and completeness of information and figures.	
Writes letters and memos to reply	Writes	Letters and Memos	To reply to requests for general information and to answer routine communications.	When content and format can be based in part on previous correspondence.
Evaluates written and oral reports form project managers about project dates, deadlines and expenses to monitor progress and set resource priorities.	Evaluates	Information	To monitor progress and prioritize resources.	From written and oral reports.
Reviews agency projects on-site for compliance with federal and state standards; writes report of findings.	Reviews	Projects	To decide compliance and write report of findings.	On-site, using federal and state standards.

Be Specific

The PD writer can clarify terminology and descriptions of work by asking a mental follow-up question, "in order to do what?" or "for what purpose?"

Examples:

Poor Statements	**Good Statements**
Asks clients questions from a standard form.	Questions clients to decide eligibility for (*specific*) services, records answers on eligibility form and forwards to processing for acceptance or rejection.
Types letters and reports.	Types final letters and reports from rough copy and general instructions; selects the correct format and proofs draft for tying, spelling, and format errors.

Avoid Ambiguous Terms

The use of ambiguous terms such as "assists," "handles" and "prepares" without a further explanation of how it occurs is invariably a sign of inadequate information. Using the word "by" and then writing the processes, tasks or operations done, usually clarifies the ambiguity. For example, the word "assists," when used alone, can be widely interpreted. It is almost meaningless for position description purposes.

An employee who "assists" in a given piece of work may do such simple duties as searching files and assembling material. On the other hand, an employee may "assist" by doing the same duties as the employee being assisted except for the final responsibility for the work product.

Again, much or very little may be meant by the word "prepares." For example, "prepares statistical tables" might simply mean that the employee copies numbers from given places on a schedule, posts them to a given column and line on a tabulation sheet, and uses an adding machine to sum them and compute averages and percentages. On the other hand, it might mean that the employee uses initiative to seek out or develop sources of basic information, decides the means to collect the information, designs the tables, and writes the interpretative text.

If you describe the duties in terms of "what the worker does" instead of "what gets done," you will find it easier to avoid ambiguous terminology.

Because of the range of actions they may describe, other words that can be ambiguous without further explanatory detail include:

analyzes arranges assesses checks communicates compiles conducts research coordinates decides determines develops	edits examines handles instructs interviews maintains manipulates modifies monitors operates organizes	oversees participates persuades plans processes researches reviews services supervises works with

Avoid the Passive Voice

The passive voice (i.e., is recommended, was filed, were summarized, were reported) suggests an action without an agent. When writing PD's, use an action verb. This identifies the action taken, to whom or what, and describes the expected outcome. This clarifies **who** files **what**, **who** recommends **what**, **who** summarizes **what**, or **who** reports **what**. Following **who does what** are the additional details of **to whom** and **for what purpose.**

Be Accurate

Don't overstate or understate. Describe the job as it exists today and not as it may be in six months. Look at what tasks the employee does, not at how well he or she does them.

Writing an accurate PD is more difficult for new positions (such as those new positions proposed during budget preparation process). Nonetheless, it is the writer's responsibility to envision what the job will do and describe it on the appropriate PD form. When developing a PD for a job that does not currently exist, the PD writer has an additional task; they must think through what work will be done and how it will be done. Further, this work may be for a program that may not yet exist. This requires additional thought and planning.

Writing a complete and accurate PD, especially of a proposed new position, is not a quick or easy task. It often takes more than one draft. Allow time to think through the organization and individual business and job needs, to discuss with Human Resources staff, and to rewrite the PD as needed.

A common shortcoming is writing the PD by paraphrasing an OUS Class Specification instead of giving the clearest description of the assigned work. While a quick paraphrase of the class specification may appear to save time, it generally leads to processing delays in authorizing new positions, reclassification reviews of current positions, or in recruitment to fill a position. Such PD's fail to give the specific information an employee needs. In any case, a PD based on anything other than the writer's best understanding of the actual job duties fails to serve its many purposes.

Administration

There must be a PD for every position, whether filled or vacant. An accurate PD is required for correct allocation, for proper budgeting and effective recruitment. Revise the PD whenever duties or responsibilities of a job change significantly. Other changes such as position number or geographic location must also be revised on the official PD. The supervisor should review the existing PD with the incumbent yearly and initial it to verify that it is still accurate. A good opportunity for this is at the time of the annual performance evaluation. However, this does not replace the need to revise the PD as changes in the job occur.

CLASSIFIED POSITON DESCRIPTION (PD) FORM – Instructions

Complete all sections of the form. Responses, by section number, may be continued on an additional sheet; or you may expand the computerized form as needed. When using abbreviations, give an initial explanation of what they mean. (i.e. Office Specialist 2 {OS2}, Graphic Artist 3 {GA3}, Purchasing Agent 2 {PA2}.) Use classification titles and working titles when referring to other employees. If you need help or have questions, consult the Human Resources Office staff.

Completion of the Classified PD Form - By Sections

In the upper middle of the first page, mark whether the PD describes a New Position, or if it is a Revised PD (if Revised, note date of revision).

Section 1 - Position Information

a. **Class Title** – from the OUS Class Specification
b. **Class Number** – from the OUS Class Specification
c. **Position Number** – formally assigned to the position.
d. **Working Title** – the job descriptor as assigned to the position by the manager.
e. **Work Unit** – the section, unit or location of the position (i.e. Campus Dining, University Computing Services, Business Services, University Advancement, etc.)
f. **Work Location (City-County)** –
g. **Employee Name** –
h. **Effective Date** – for new positions, show the earliest date the position will be established dependent upon funding authority. For existing positions that have changed, the date should show when the changes take effect.
i. **Position** – mark the boxes that apply to the position, NOT the incumbent.

j. **FLSA** – this is the Fair Labor Standards Act (FLSA) designation; mark Exempt – Not eligible for Overtime; or Non-Exempt – eligible for Overtime. Some general reminders are:
   - Base the exemption on job content, not on the position's classification.
   - The salary range alone does not make a position FLSA Exempt.
   - The Union Contract may stipulate overtime provisions differently from the FLSA, creating overtime obligations beyond the FLSA requirements. However, they may not limit or restrict the application of the FLSA.
   - Work with your Human Resources Office to utilize the FLSA Worksheets to fully document FLSA Exempt Status.

Section 2 – Program and Position information

a. **Describe the program** in which the position works and what the program does. State how it contributes to the purpose of the agency. Be sure to include general information about program size (employees, budget), scope (geographic region, statewide) and who or what the program affects.

b. **Describe the purpose of the position** within the program. Briefly summarize why the position exists and its role in reaching program objectives (i.e., supportive, technical, supervisory, program manager). Think in terms of describing a job to a new friend. One or two sentences are sufficient to describe most jobs.

   Examples:

   1. This position provides secretarial support for the division chairs in the Special Education Division by typing letters and reports and keeping accurate records.

   2. This position processes invoices to pay amounts owed and maintains the records supporting those disbursements. This position also processes daily check disbursements and inputs new vendors into the Financial Information System (FIS) via vendor hot-line.

   3. This position directs and monitors the work of technical and professional employees of the BANNER Support Unit who collect and analyze payroll samples to ensure compliance with state and federal tax rules and regulations.

   4. This position provides secretarial, receptionist, budget and records maintenance, and general office support to the Director and staff of the Student Enrichment Program of Western Oregon University.

Section 3 - Description of Duties

Accurately describe the major or most important duties assigned to this position. Be sure the description gives a clear picture of what the employee must do in the position. DO NOT include duties assigned solely for employee development or temporary duties. There should be an easily seen relationship between this Section (Description of Duties) and the “Purpose of the Position” portion in Section #2 (Program and Position Information).

In the first column at the left margin of duties page, enter an estimate of the percentage of work time spent doing each duty. When summed, the total is 100%. When updating an existing PD, show in the appropriate left hand column an "N" for duties newly assigned to this position and an "R" for revised duties.

In the appropriate left hand column, be sure to mark whether an identified duty is considered an **Essential Functions (EF)** of the position. Identify the duties (job tasks or responsibility statements) that are Essential Functions of this position by marking an “EF” next to those specific duty statements. This is a critical notation in order to comply with the Americans with Disabilities Act (ADA) requirements. The assigned job duties and responsibilities that are noted as Essential Functions in the PD must be performed by the employee unaided or with the assistance of a reasonable accommodation if needed.

Duties and responsibilities, or job functions, assigned to the position are Essential Functions **If:**

a. The position exists to perform the function;
b. There are a limited number of other employees available to perform the function or, among whom the function can be distributed; or
c. The function is highly specialized, and the person in the position is hired for special expertise or ability to perform it.

Job duties and/or responsibilities that are not critical to this position, or can be assigned to someone else if needed are not Essential Functions of the position. Do **NOT** mark “EF” next to these duties. These duties are desirable functions of the position, but do not meet the above criteria. Special projects and other ad hoc duties are never considered Essential Functions of a job, although they can be listed as an assigned duty in this section.

Be specific. Begin each duty statement with an action verb that describes actual activities, whether physical or mental. Be complete. Assure duty descriptions include what the employee does, how he or she does it, to whom or what and for what purpose.

Examples:

Poor Statements	**Good Statements**
Assists in handling correspondence	Receives, opens, date stamps, sorts and routes incoming mail to appropriate staff for needed action.
Maintain grounds and landscaped areas	Mows lawn with power mower and hand mower to maintain appearance of grounds.
Keeps claim registers.	Lists the claim number and the claim amount in a monthly register for tracking in-process claims.
The employee is responsible for keeping all records.	Compares invoices with purchase orders for consistency and accuracy. Reviews purchase requisitions submitted by the (named) departments for accuracy and gives them to Purchasing Agent for approval.
Manages the office.	Schedules work assignments of support staff to assure effective use of resources. Assigns and ranks priority of work as needed. Reviews completed work for accuracy and timeliness. Approves time off assuring staffing levels needed to complete support work.

Section 4 - Working Conditions

Use this section to describe general and specific working conditions, including danger of injury and other risks that are out of the ordinary and cannot be mitigated through training and safe work practices. Include how often such conditions are present.

Some positions may need a more detailed analysis of physical and mental requirements to assure compliance with governing regulations such as the ADA or Return of Injured Workers; for these, work with your Human Resources Office.

Section 5 - Guidelines

List any established guidelines used to do this job (i.e., State or Federal laws or regulations, policies, manuals or desk procedures) and how the employee uses them.

Examples:

Poor Statements	**Good Statements**
State tax laws.	Explains State tax laws (*list those specific to position's use*) to people who call the office as part of the taxpayer assistance program.
Desk procedures.	Desk procedures that show proper formats and review procedures when typing letters for the unit, agency or other agency (such as letters for the Director's signature).

Section 6 - Work Contacts

Identify people or groups of people outside the work unit with whom the employee has contact in the normal course of doing assigned work. Examples are clients, students, residents, other people within the agency, State employees in other agencies, legislators, Federal employees at regional or national levels, or the general public.

Refer to people by the job they do or by the job title. Do not use people's names in response to the "who contacted" question. Show how the employee makes contact (i.e., by telephone, in person), why (i.e., exchange of information, explain rules) and how often (i.e., daily, once a week, once a month, etc.).

Section 7 - Job-Related Decision Making

Use specific examples of typical decisions made by the employee in the position (i.e., sets work priorities, hires staff, selects and orders equipment, approves purchases) to illustrate the position's authority. This section should relate the level of responsibility for decision making to the assigned duties in Section #3.

Section 8 - Review of Work

Describe who reviews the work by Classification or Working Title, and position number. Explain how, how often, and why the supervisor reviews the work.

Examples:

1. The Food Services Manager (position #) reviews the work daily and at weekly meetings to discuss problems, keep advised of progress, and ensure timely production of high quality food product.

2. The Director of University Computing (position #) reviews the work daily or weekly to ensure the IT inventories and purchasing plans are accurate and complete.

Section 9 - Leadwork or Coordination of Duties

Check the appropriate boxes for the leadwork and/or coordination responsibilities assigned to this position. Show the percentage of time and for how many employees this position provides these activities. There should be an interrelationship between this section, Section #3 (Description of Duties), and the Section #7 (Job Related Decision Making).

Section 10 - Additional Job-Related Information

This provides an opportunity to add any additional job-related information not specifically captured in another section of the PD, but which will help clarify the nature and special requirement needed for the job.

Special Requirements - List any special licenses, certifications, registrations or permits required by law, rule or regulation for the position.

Budget Authority - If the position has authority to spend or encumber money for supplies or equipment, give the total biennial budget amount. Show expenditure area (i.e., services and supplies, capital outlay, personal services, etc.) and describe the source of expenditure authorization (i.e., budget or grant funding, etc.).

Section 11 - Organization Chart

To provide a visual description of where the position functions within the organization, complete the chart provided by filling in the boxes with the requested information. However, it may be preferable to attach an expanded organizational chart to the completed PD form. You may use an existing organizational chart if it is accurate, up-to-date and gives all the information needed.

The following information should be included in an expanded organizational chart:

- Each organizational box should include the following information: Classification Title and Classification Number (for Classified positions), working title (for Unclassified Professional positions), salary range, position number, and the employee's name.

- Highlight or clearly designate the subject position.

- Identify at least two levels of management/supervision above the subject position.

- Identify all other positions directly reporting to the same supervisor.

- If this is a Leadworker of Coordinator position, identify positions which the position has direct responsibility.

Section 12 - Signatures

- If there is an incumbent in the position, have the employee sign and date the form. Their signature is only an acknowledgment that the employee has read the PD. It does not mean that the employee agrees or disagrees with the position description, only that the employee knows the duties assigned to the position.

- The immediate Supervisor of the position also signs and dates the form. The supervisor, by signing the PD, certifies that the form contains correct information and describes the duties which agency management wants this position to do.

- The Reviewer, often the Director or Vice President, reviews, signs and dates the form to ensure program consistency, accuracy and effectiveness.

- The Appointing Authority, signs and dates the form, certifying that the information provided is correct. The Appointing Authority signature certifies that it is the employee's official position description.