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How to Write an Effective PD

Position Description Training

The University of Tennessee System

Learning Outcomes

- Identify the who, what, where, when, why and how of Position Descriptions (PD)
- Apply knowledge learned to write a concise yet descriptive Position Description
- Ability to utilize the new PD and Classification Request Forms

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The Who.

Position Descriptions are required

- Regular staff
- Post-doctoral Research Associates

Position Descriptions are not required

- Student positions (Undergrad & Graduate)
- Faculty
- Friends

The What.

A Position Description documents a specific set of essential functions and qualifications for one unique position.

It is a formal document describing how a position fits within the unit and organization.

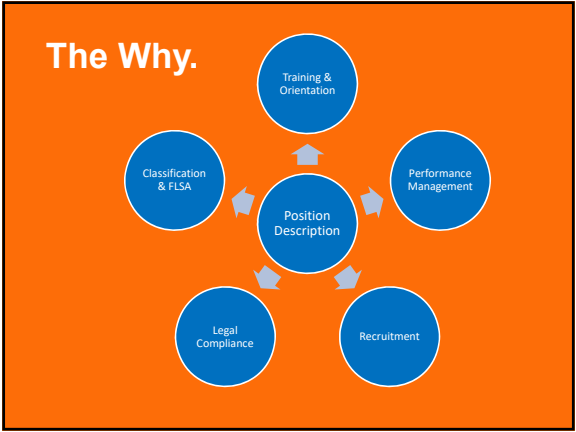
The Where.

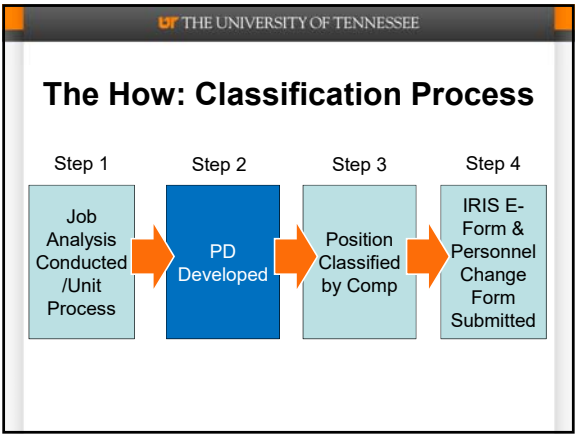
The Role of Compensation

- Classify regular staff positions
- Assist with departmental reorganizations
- Process IRIS position forms

The When.

- Vacancies – prior to recruitment
- Annual review
- Significant changes to the department structure or work occur
- New work is created – establishing a Position
- Every 3 years





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Pitfalls to avoid


Position not Person

- A Position Description should address the needs of the unit – not highlight the incumbent’s special skills or interests
- The minimum experience and education needed should be based on duties – not the incumbent’s qualifications or capabilities
- A PD does not measure work load, or recognize an employee’s performance or longevity
- Classification is not based on incumbent or budgeted salary

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Consequences of poorly written PDs can lead to:

- Recruitment or retention problems
- Miscommunication of performance expectations
- Misclassification if importance of position is exaggerated or downplayed



More on
“The How”

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Getting Started

- Define current business needs
- Identify goals the new position would meet
- Identify type of work necessary to meet goals and competencies needed to successfully perform work
- Identify peer positions – even other institutions – and gather information
- Identify the relationship and role within the unit, including supervisory relationships
- Identify budget for position

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A Tale of Two Forms

- Position Description – a formal document that describes a unique position
- Classification Request Form – a form used to request a classification review of a Position Description

Completing the PD Form

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POSITION DESCRIPTION

INSERT FORM

PRINT FORM

POSITION INFORMATION		Effective Date:	
Position Number	Working Title	Current	End Date
Department		Supervisor's Position Title	Supervisor's Position Number
JOB KEY ONLY			
Job Title	Job Key	Pay Grade	Exception
		Choice One	Choice Two

POSITION DETAILS

Position Summary - Summarize the primary purpose of the position.

Position Responsibilities - Total responsibilities must equal 100%. List essential functions in decreasing order of importance. Similar tasks should be grouped together. Any responsibility totaling less than 1% of the time should be grouped with a greater percentage of time functions.

% of Time

Job Function/Responsibilities

% of Time

Job Function/Responsibilities

<http://tennessee.edu/pay/position-descriptions/>

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Components of the PD

- Position Information
- Position Details including summary and functions
- Competencies/Qualifications (KSA's, education & experience)
- Supervisory/Work Direction Responsibilities
- Independence of Action/ Level of Supervision Received
- Impact of Decisions
- Budget Responsibilities
- Conditions of Employment
- Working Conditions

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Position Information

POSITION INFORMATION		Effective Date:	
Position Number	Working Title	Campus	Cost Center
For new positions, use leave blank		Choose One:	-
Supervisor's Position Title	Supervisor's Position Number		
HR USE ONLY			
Job Title	Job Key	Pay Grade	Exemption
		Choose One:	

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Working Title

- Should be based on position
- Avoid elevated titles
- Accurately reflect the nature of the job
- Generic yet self-explanatory

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Position Information

POSITION INFORMATION		Effective Date:	
Position Number	Working Title	Campus	Cost Center
		Choose One:	
Department	Supervisor's Position Title	Supervisor's Position Number	
		Choose One:	
HR USE ONLY			
Job Title	Job Key	Pay Grade	Exemption
		Choose One:	
POSITION DETAILS			
Position Summary – Summarize the primary purpose of the position			

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Position Information

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		Choose One:	
Department	Supervisor's Position Title	Supervisor's Position Number	
		Choose One:	
HR USE ONLY			
Job Title	Job Key	Pay Grade	Exemption
		Choose One:	
POSITION DETAILS			
Position Summary – Summarize the primary purpose of the position			

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HR Use Only

POSITION INFORMATION		Effective Date:	
Position Number	Working Title	Campus	Cost Center
		Choose One:	
Department	Supervisor's Position Title	Supervisor's Position Number	
		Choose One:	
HR USE ONLY			
Job Title	Job Key	Pay Grade	Exemption
		Choose One:	
POSITION DETAILS			
Position Summary – Summarize the primary purpose of the position			

Job title, job key, pay grade and FLSA exemption are assigned by the Compensation Analyst. HR completes this section.

Functions/Responsibilities

Position Responsibilities – Total responsibilities must equal 100%. List essential functions in decreasing order of importance. Similar tasks should be grouped together. Any responsibility totaling less than 5% of the time should be grouped with a greater percentage of time function.

% of Time	Job Function/Responsibilities

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Position Responsibilities

Method 1

- 1) Think of the job in terms of major or key responsibilities or functions (shoot for 3-5)
- 2) After establishing these, think about specific job duties for each
- 3) Assign percentage time for each function
- 4) Condense the job duties into concise action statements

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Method 1 example

Budget Management

- Maintains and reconciles ledgers for four accounts.
- Prepares budget and expense reports and provides to faculty monthly.

Administrative Support

- Coordinates committee biweekly leadership meeting by scheduling, preparing agendas and taking minutes.
- Gathers data and prepares ad hoc reports for use in accreditation documentation.

Event Coordination

- Coordinates departmental events, by booking venues, scheduling speakers and arranging travel and stipends, and preparing invitations.
- Manages event operations by preparing venue set-up and acting as point-of-contact during events.

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Position Responsibilities

Method 2

- 1) Brainstorm a list of all the duties – include tasks that are daily, weekly, monthly and annual
- 2) Cluster duties into 3-5 like functions/ responsibilities – determine a function title
- 3) Assign percentage time to each function
- 4) Condense the job duties in each group into concise action statements

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Method 2 example

- Manages event operations by prepares venue set-up and acting as point-of-contact during events.
- Maintains and reconciles ledgers for four accounts.
- Coordinates committee biweekly leadership meeting by scheduling, preparing agendas and taking minutes.
- Prepares budget and expense reports to faculty monthly.
- Coordinates departmental events by booking venues, scheduling speakers and arranging travel and stipends, and preparing invitations.
- Gathers data and prepares ad hoc reports for use in accreditation documentation.

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Method 2 example continued

Budget Support

- Maintains and reconciles ledgers for four accounts.
- Prepares budget and expense reports to faculty monthly.

Administrative Support

- Coordinates committee biweekly leadership meeting by scheduling, preparing agendas and taking minutes.
- Gathers data and prepares ad hoc reports for use in accreditation documentation.

Event Coordination

- Coordinates departmental events by booking venues, scheduling speakers and arranging travel and stipends, and preparing invitations.
- Manages event operations by preparing venues, acting as point-of-contact during events.

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Step 3: Percentage of Time

<u>Percentage</u>	<u>Week</u>	<u>Year</u>
5 percent	2 hours	2 ½ weeks
10 percent	4 hours	5 weeks
15 percent	6 hours	1 ½ month
20 percent	8 hours	2 ½ months
25 percent	10 hours	3 months

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Step 4: Action Statements


Condense the specific job duties into concise action statements, beginning each with a present-tense action verb. Use **Verb/Object/Explanatory Phrase** structure.

Example:

- Audits documents for mathematical accuracy and policy compliance.

*See Handout of Action Verbs

Keep it simple....



Supervisors

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Other Language Tips

- Keep each statement in the position details crisp and clear.
- Since the occupant of the position is the subject of your sentence, it may be eliminated.
- Omit any unnecessary articles such as "a", "an", "the", or other words for an easy-to-understand description.
- Avoid using adverbs or adjectives that are subject to interpretation such as "frequently", "some", "complex", "occasional", and "several".
- Spell out acronyms at first instance.

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Exercise 1

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Management	Strategic Planning	Budget
<ul style="list-style-type: none">• Recruits, selects and trains unit staff to perform day-to-day operations• Establishes standards and policies for unit operations• Manages unit by planning, coordinating, and controlling unit work and procedures• Analyzes long-range impact of decisions and plans for use in management decisions	<ul style="list-style-type: none">• Manages strategic plan by creating, reviewing and implementing annually• Sets strategic direction by collaborating with senior administration• Conducts comprehensive organizational review to create strategic plan	<ul style="list-style-type: none">• Ensures fiscal compliance• Prepares operating budget for unit annually• Presents budget request and justification annually

% of Time	Job Functions/Responsibilities
40%	Management Recruits, selects and trains unit staff to perform day-to-day operations. Establishes standards and policies for unit operations. Manages unit by planning, coordinating, and controlling unit work and procedures. Analyzes long-range impact of decisions and plans for use in management decisions
30%	Strategic Planning Manages strategic plan by creating, reviewing and implementing for unit annually. Sets strategic direction by collaborating with senior administration. Conducts comprehensive organizational review to create strategic plan.
30%	Budget Prepares operating budget for unit annually. Presents budget request and justification annually to the board. Ensures fiscal compliance.

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Competencies/Qualifications

Competencies/Qualifications

Knowledge, Skills, and Abilities (KSAs) required to perform essential job functions. All KSAs should be related to the functions and responsibilities of the position. These statements should all contain the word "knowledge", "skill", or "ability". This is not the preferred language.

The application of a body of information specific to the performance of a function. Examples of knowledge statements: Knowledge of proper accounting procedures. Knowledge of basic computer operations.

The skills required to perform the position's essential functions. Examples of skills statements: Advanced MS Excel skills. Analytical skills. Basic fiscal skills.

The ability to perform a behavior or task. Examples of ability statements: Ability to supervise. Ability to coordinate events. Ability to create and deliver training.

Preferred knowledge, skills, and abilities

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What are KSAs?

Knowledge is the theoretical or practical understanding of a subject.
Example: Knowledge of Lean principles.

Skills are the proficiencies developed through experience and training.
Example: MS Access skills.


Abilities are the qualities of being able to do something.
Example: Ability to learn new software.

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Determining KSAs

Knowledge, skills and abilities statements should be directly tied to the functions and responsibilities.



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Exercise 2

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Education/Experience

Education/Experience

Education – Describe the minimum level of education necessary to perform the essential functions of the position. Where not required by law, an equivalent combination of training and experience may substitute for education

Required	Preferred	Level/Type of Education	Field of Study (indicate if a related field may be substituted)
<input type="checkbox"/>	<input type="checkbox"/>	High school diploma or GED	
<input type="checkbox"/>	<input type="checkbox"/>	Vocational or technical training	
<input type="checkbox"/>	<input type="checkbox"/>	Associate's Degree	
<input type="checkbox"/>	<input type="checkbox"/>	Bachelor's Degree	
<input type="checkbox"/>	<input type="checkbox"/>	Master's Degree	
<input type="checkbox"/>	<input type="checkbox"/>	Doctoral Degree	
<input type="checkbox"/>	<input type="checkbox"/>	Other licenses/certifications	

Experience – the minimum amount/type of experience necessary to perform the essential functions of the position

Required level/type of experience and/or years of experience

Preferred level/type of experience and/or years of experience

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Education/Experience

Required (minimum)

- Tied to duties
- Specific level or type of experience over years of experience
- Not all jobs require degrees
- Where not required by law, an equivalent combination of training and experience may substitute for education – same for certifications/licenses

Preferred

- Used to narrow the pool of applicants
- What the ideal candidate should possess
- Specific experience
- Preferred degrees

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Supervisory / Work Direction Responsibilities

Supervisory Work Direction Responsibilities

<input type="checkbox"/>	This position has no supervisory responsibilities.
<input type="checkbox"/>	This position provides work direction to others (includes students).
<input type="checkbox"/>	This position has supervisory responsibilities and is responsible for staff performance management.

Please submit a Divisional Organization Chart. Please include detailed reporting relationships of this position in relation to others. Include subordinate positions, including students, graduate students, and consultants.

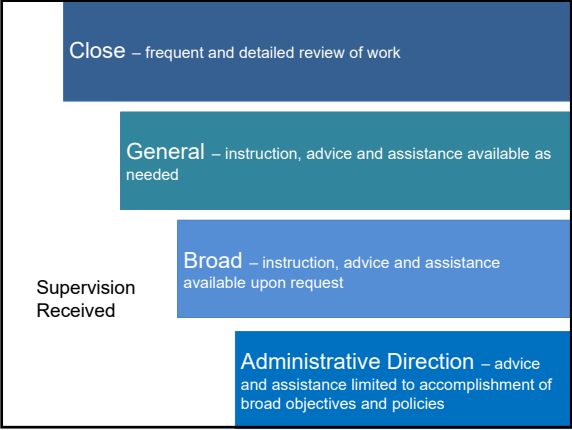
- "work direction" – May provide day-to-day guidance, training, and direction for staff in addition to other duties. May assign and review work. May make recommendations for corrective action. May lead processes or projects without assigning and reviewing work.
- "supervisory" – Provides day-to-day work direction to employees, and review progress. Hire, train, provide feedback, evaluate performance, and initiate corrective action.


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Independence of Action/ Level of Supervision Received

Independence of Action/Level of Supervision Received

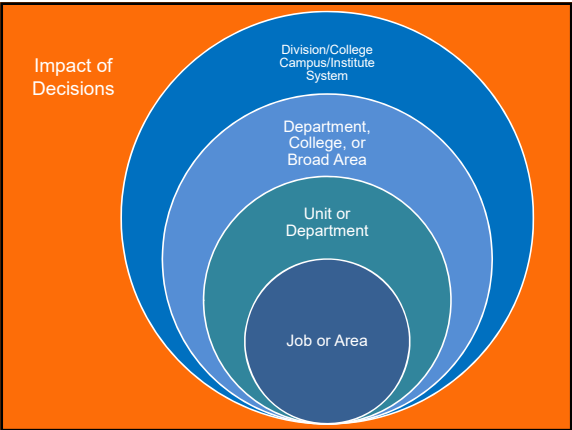
<input type="checkbox"/>	Work is closely monitored by supervisor/manager; clearly stated instructions and procedures are generally provided; tasks, duties, and responsibilities are generally standardized and routine in nature; instruction, advice, and assistance readily available
<input type="checkbox"/>	Work progress is generally monitored by supervisor/manager; employee performs assigned tasks, duties, and responsibilities by following established policies and procedures; may set own priorities and organizes work within general guidelines established by supervisor/manager
<input type="checkbox"/>	Supervisor/manager defines objectives, priorities, and deadlines; existing practices are used as guidelines to determine specific work methods; carries out work activities independently; supervisor/manager is available to assist in resolving problems
<input type="checkbox"/>	In consultation with supervisor/manager, sets own priorities and goals and determines how to accomplish results with few or no guidelines to follow, although past practices may exist; keeps supervisor informed of progress, potentially controversial matters, or matters with far-reaching implications



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Impact of Decisions

Impact of Decisions	
<input type="checkbox"/>	Decisions generally impact own job or area.
<input type="checkbox"/>	Decisions impact a unit or department. May contribute to business and operational decisions that impact the department. Makes recommendations to manager/supervisor that are generally implemented/accepted.
<input type="checkbox"/>	Decisions have substantial impact on management and operations of an area within department, college or broad functional area. May contribute to important strategy, operational and business decisions which impact the department.
<input type="checkbox"/>	Decisions have a significant impact on the management and operations of a division/college/campus/institution/system. Contributes to the decisions on the overall strategy and direction of the organization.



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Budget Responsibilities

Budget Responsibilities

☐ No Budget Responsibilities

☐ Monitor/maintain budgets – Processes transactions, monitors balances, and reconciles accounts.

☐ Managerial/signature budget authority – Approves and commits funds for salaries, and to acquire materials, resources, supplies, services, etc.

☐ Full budgetary oversight – Establishes budget and has full authority to implement budget initiatives

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Conditions of Employment

CONDITIONS OF EMPLOYMENT

Designated personnel for emergencies – Is this position required to report to their designated work location to ensure operation of essential campus functions or departments during an emergency, or when the University has suspended or delayed operations?

Choose One:

No

Shift

Yes

Required – Select any additional background checks this position requires in addition to the basic background checks

☐ Covered Programs Check

☐ Credit Check

☐ Drug Screening

☐ Security Clearance Check

Work Schedule

Occasional

Frequent

Weekends

Evenings

Overnight Travel

Other Conditions of Employment required to perform essential functions of this position (i.e. the employee would lose their job if at some point they didn't meet these conditions.) e.g. Valid Driver's license, pesticide application certification

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Completing the Classification Request Form

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CLASSIFICATION REQUEST [RESET FORM](#) [PRINT FORM](#)

An updated Position Description and Organization Chart should accompany this request.

CURRENT POSITION INFORMATION

Position Number	Accountant	Personal Number	Campus
Job Title	Department	Cost Center	Class. Div.
Supervisor's Name	Supervisor's Position Number	Phone	Email
Department Contact	Phone	Email	

REASON FOR EVALUATION

Choose One

JUSTIFICATION FOR THE ACTION

Proposed Job Title: Proposed Working Title:

Provide a brief summary of the reason for this request. If this request involves the assignment of new duties or re-assignment/removal of current duties, include the position information for the other position(s) affected by the change. Affected position descriptions should also be updated and reviewed.

PEER POSITIONS

Position Number	Title	Department

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Components of the Classification Request Form

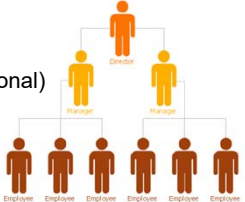
- Organization Chart
- Current Position Information
- Reason for Evaluation
- Justification for the Action
- Peer Positions

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Organizational Chart

Include:

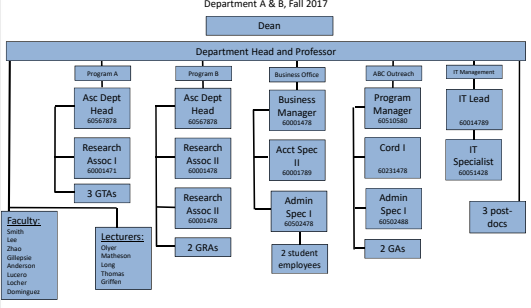
- Every position in the unit/department
- Show where they are in the organization up to the division level
- Titles for each position
- Position number
- Incumbents' name (optional)



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Org Chart Example

Department A & B, Fall 2017



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Current Position Information

CURRENT POSITION INFORMATION			Date of Request:
Position Number	Incumbent	Personnel Number	Campus
Job Title			Choose One:
Supervisor's Name			Chattanooga
Supervisor's Position Number			Development Foundation
Department Contact			Health Science Center
Phone			Institute for Public Service
Email			Institute of Agriculture
			Knoxville
			Martin
			Space Institute
			System Administration
REASON FOR EVALUATION			
Choose One:			

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Current Position Information

CURRENT POSITION INFORMATION				Date of Request:	
Position Number	Incumbent	Personnel Number	Campus	Choose One:	
Job Title	Department		Cost Center		
Supervisor's Name	Supervisor's Position Number	Phone	Email		
Department Contact	Phone	Email			

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Reason for Evaluation

REASON FOR EVALUATION

Choose One:
Choose One:
Career Path
Classification Review
New Position
Standard Review Cycle

Career Path

- Establishing a new position on career path
- Each move on career path

Classification Review

- Reclassification
- Reorganization
- Temporary to Regular Conversion
- Update
- Vacancy

New Position – Creating a new position

Standard Review Cycle – Statewide review

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Justification for the Action

JUSTIFICATION FOR THE ACTION	
Proposed Job Title	Proposed Working Title
Provide a brief summary of the reason for this request. If this request involves the assignment of new duties or re-delegation/removal of current duties, include the position information for the other position(s) affected by the change. Affected position descriptions should also be updated and reviewed.	

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Peer Positions

If applicable, please identify positions performing similar work within your department or within the College/Campus/University.

Position Number	Title	Department

For review submit:

1. Position Description
2. Classification Request Form
3. Organizational Chart

What we covered:

- The who, what, where, when, why and how of Position Descriptions (PD)
- How to write a concise yet descriptive Position Description
- How to complete the new PD and Classification Request Forms

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Thank you for your participation!

Questions?
