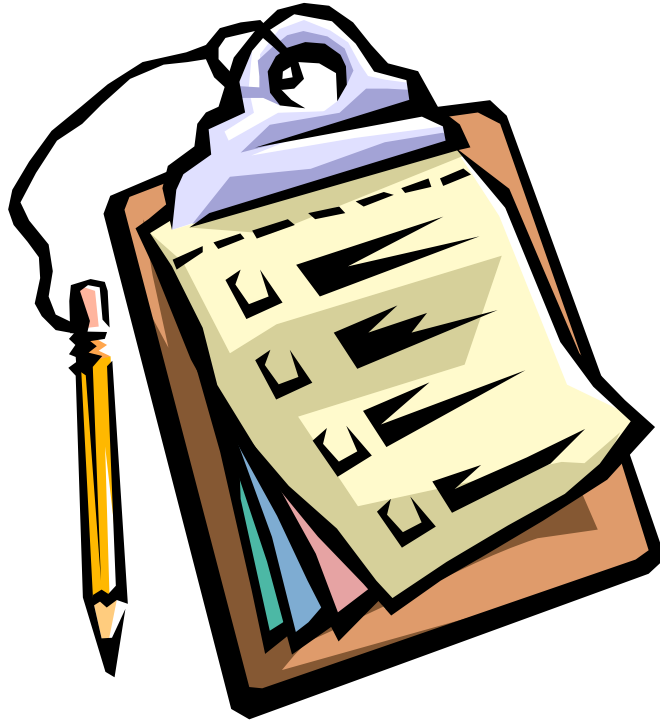


ST. LAWRENCE
UNIVERSITY



Instructional Guide

for the preparation of
job descriptions

Title _____ Date _____

Employee Name _____ Grade (if applicable) _____

Supervisor's Name _____

A. General Summary of Job:

B. Essential Functions:

C. Qualifications:

- Education/Knowledge:

- Experience:

- Skills/Physical Requirements:

***SAMPLE
FORMAT
SEE
INSTRUCTIONS
ON THE
FOLLOWING
PAGES***

D. Supervision Received:

E. Supervision Exercised:



Instructional Guide for the Preparation Of Job Descriptions

No single instrument is as important in effective human resource management as the job description.

What is a job description?



A job description is a narrative statement or listing of duties and responsibilities (sometimes referred to as functions).

An accurately written job description ensures a fair and thorough analysis of the duties each employee is performing independent of the person performing the job. The employee knows exactly what is expected of him/her on the job and to whom he/she is accountable. Wage and salary levels for the position are determined objectively through position analysis.

For management, position descriptions provide a useful guide for employee selection and evaluation. A well-written job description is also essential for:

- >> evaluation of job content
- >> providing accurate data for making pay comparisons with other organizations
- >> use as a communication tool between employees and supervisors
- >> recruitment process
- >> new employee orientation
- >> training and development
- >> career planning

Accurate position descriptions should answer the following questions:

- >> What exactly is required of the employee?
- >> What are the most complex duties performed?
- >> What skills and experience are required?
- >> To what extent is independent judgment required?
- >> What is the likelihood and impact of errors?
- >> With whom does the person interact?
- >> What physical effort or manual dexterity is required?
- >> What unusual working conditions exist?
- >> What supervisory responsibilities are involved?



The process of writing job descriptions is divided into *three* major steps:

I. Collecting Job Description Information



A. The information that is collected will help in:

understanding the *nature* of the work being performed including principal:

- >> tasks
- >> duties
- >> responsibilities



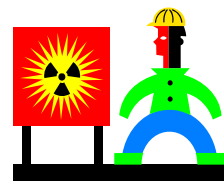
understanding the *level* of work performed, such as:

- >> how much
- >> what type of knowledge
- >> what types of skills
- >> mental and physical effort
- >> responsibilities required for the job



also:

- >> working conditions
- >> hazards
- >> general physical conditions



B. Information about positions is collected from primary or secondary sources.

Primary data sources are the employees who are actually performing or supervising the work. Using:

- >> management input
- >> questionnaires/worksheets
- >> interviews
- >> logs/diaries
- >> direct observation
- >> work plans



Each of these has advantages and disadvantages. You strive for comprehensiveness, accuracy, and flexibility. More than one method of acquiring data should be used.

All other sources of information about a job are referred to as *secondary* sources. Examples of these sources are:

- >> U.S. Department of Labor's Dictionary of Occupational Titles
- >> Occupational Outlook Handbook
- >> information from other departments and campus
- >> pay surveys
- >> existing job descriptions
- >> information on similar jobs provided by other employees
- >> industrial engineering studies (where applicable)



To a great extent, department heads use the primary sources to collect information. The Human Resources Department can provide you with information from the secondary sources.

C. Collecting Data Through the Job Description Worksheet



In preparing a position description, it is often helpful to work with a person who is presently in the position. Give the Job Description Worksheet (see Appendix A) to the employee prior to discussing the job. The employee completes the questionnaire describing, in his/her own words, the functions and duties of the position.

This worksheet is used by the supervisor as a basis for discussion.

B. Collecting Data Through Interviewing the Present Employee



An interview is an act of personal communication, an exchange of information, and a sharing of perceptions. The interviewer must be well prepared with carefully formulated questions to gather good information.

The following are some suggestions for the interview:

- >> hold the interview in an area free from interruptions and distractions.
- >> introduce the purpose of the interview to the employee and how the information will be used.
- >> be prepared - with questions. The *Position Description Worksheet* can help with this step.

II. Writing the Job Description



A. General Summary of Position

The opening paragraph, *General Summary of Position*, should give anyone reading the description an overview of what the position entails. In addition, the General Summary of Position statement indicates the degree of supervision received. One of the following expressions will be appropriate to begin the general summary of the position:

Examples of a completed General Summary of Position are:

"Under the supervision of the Store Manager, perform a variety of clerical, typing, and inventory control duties in support of the materials service function."

"Under the supervision of the Associate Director provides administrative and clerical support for six professional staff members. This work requires completion of a diverse range of complex tasks with minimal supervision."

B. Duties/Responsibilities

This section is a more complete listing of the duties of the job.

In describing *duties/responsibilities* the list of one line responsibilities should be combined into paragraphs describing similar functions.

The following examples are typical:

“Accept daily incoming mail from both interoffice and outside the University and immediately distribute as appropriate; this excludes daily bulk mail deliveries from the campus mailroom”

“To provide additional clerical support (alphabetizing, typing, data entry, labels, etc.) as the work load allows. During peak application weeks, there may be a need for clerical assistance in another phase of the application processing. When the telephone call load allows, this individual is responsible for identifying the times/areas that need the extra assistance”

In selecting paragraph order, the most complex, responsible, time-consuming, or important duties are usually listed first.

A succinct, direct style of writing should be used. Sentences should begin with action verbs (see list in Appendix B) and phrases should clearly indicate the physical tasks and scope of the duties being performed. Imprecise verbs and phrases such as “deal with” and “handle” should be replaced with more accurate action verbs. Use the present tense. Complete sentences are not essential, but clarity is very important.

One or two examples can be clearer than several sentences of description.

“Perform other duties as assigned” is generally added at the end to cover the less common tasks.

See “Appendix C Helpful Hints: Describing Duties, Skills, Minimum Qualifications” and appendix D a “Percentage of Time Chart” .

C. Qualifications

The qualifications section describe the primary education/knowledge, experience, and physical requirements for the position. Required vs. preferred: when a skill/knowledge/experience statement is required an applicant must meet that requirement in order to be considered. This can also be said as a “must”. Preferred means just that: the skill/knowledge/experience level is desirable, but the lack of it does not disqualify a candidate.



1. Education/Knowledge

The complexities and relative levels of specialization involved in various positions demand varying degrees of knowledge, skills, and abilities, which constitute the basic knowledge requirement of the position. The minimum amount of formal education required to perform the position’s basic duties should be expressed here. Usually this statement begins with the words, “Equivalent to . . .”, unless a state law requires a license to perform the position duties, in which case, that should be indicated, e.g.:

“High school diploma or equivalent”

“Associate Degree in Secretarial Science preferred, or 3 years prior secretarial/clerical experience”

“Completion of secretarial studies program”

2. Experience

Assuming a person meets the Education/Knowledge requirement for the position, the Experience requirement should accurately indicate, usually in years, the minimum amount of experience necessary to proficiently perform the basic duties of the position. This includes previously qualifying experience in a related or less responsible position either within the organization or outside, plus the length of “on-the-job training” or period of adjustment and adaptation on the specific job itself, e.g.:

“Proficiency with Microsoft Word and Excel and working knowledge of Microsoft Access is required”

“Three to five years of experience in University housekeeping, including at least one year of supervisory responsibility required”

“At least two years of related and progressively responsible experience in a similar position preferred.”



3. Skills/Physical Requirements

The Skills/Physical Requirements are concerned primarily with the skills involved and physical demands of the job. Many positions require primarily mental demands. Other positions require the application of varying degrees of manual skills, such as lifting light, moderate, or heavy materials or objects; exposure to animal wastes or elements such as chemical fumes, radiation, dust, or work outdoors in all types of weather. (Accommodations and technical aids should be considered when hiring a disabled person.) Typical statements include:

“Duties involve operation of various electro-mechanical devices and equipment in carpenter shop. Ability to lift 20-30 pounds required.”

“Duties involve keyboarding/word processing at a speed of 50 words per minute with 95% accuracy.”

Check to insure that every duty corresponds to the general requirements.

D. Supervision Received

This statement should indicate the relative degree of independence the individual exercises in performing the position's duties, e.g.:

“Performs independently, within department's policies and procedures, referring administrative problems to the Department Head.”

“Duties performed with supervision from the Associate Director”

“Duties performed under the direct supervision of the Department Chair/Athletic Director and Associate Directors.”

“Duties performed under close supervision; most of work subject to frequent review or inspection.”

E. Supervision Exercised

Supervisory responsibility, if any, should be expressed both in terms of the level of responsibility for other (i.e. the type of supervision provided) as well as the number of persons, full-time and part-time, supervised and student status or not.

Definition of Supervision

DIRECT SUPERVISION - responsibility for assigning work, reviewing performance and making decisions regarding hiring and dismissal of employee.

Typical statements include:

"Direct supervision of five section heads; responsible for indirect supervision of up to 40 laboratory personnel."

"Provides functional guidance to five full-time and two part-time office clerks."

III. What *Not* to Include in Position Description



Federal and state laws, regulations, and recent court decisions pertaining to equal employment opportunity and anti-discrimination require careful attention to the content of position descriptions. Some examples are:

A. Discriminatory Position Titles

Use of position titles which imply that incumbents are restricted to either male or female employees is inappropriate. For example: the former position titles of Houseman and Maid would now be Housekeeper.

B. Discriminatory Use of Pronouns

Use of the pronouns "he" and "she" or "his" and "her" in position descriptions should be avoided, e.g.: instead of "In *her* absence, fill-in duties of that position." The correct way to address this type of statement would be to state "In the absence of the Lead Technician, fill-in duties of that position."

C. Names

Use the position titles when referring to a reporting relationship, e.g.: "Under the direction of the Principal Investigator" instead of "Under the direction of Dr. John Doe."

"Refers administrative problems to the Department Head" instead of "refers administrative problems to Dr. John Doe."

Job Description Worksheet

(Appendix A)

This worksheet has been prepared to assist you in describing the duties and responsibilities of your position. Please complete it and return it to your Supervisor.

Name _____ Date _____

Title _____

Department _____

Immediate Supervisor _____ Title _____

1. General Responsibilities

Describe briefly the major duties and responsibilities of your position in a way that is clear to someone not familiar with your work.

2. What are the most important aspects of the work you perform?

3. What are the most time consuming activities of your position?

4. Independent Action

List the types of work-related problems or questions you refer to your Supervisor.

(Continued)

3. **Supervision**

Do you supervise other employees? Yes _____ No _____

If yes, how many? _____ full time? _____ part time? _____

4. **Physical Requirements/Conditions**

a.) List examples of the types of equipment and instruments used in performing your duties?

b.) List examples of duties you perform that require close visual acuity.

c.) List examples of duties you perform that require physical effort in lifting or positioning or continuous standing.

d.) List examples of conditions in the physical environment in which you work that are unpleasant or hazardous; i.e., extreme temperatures, explosive chemicals, fumes, etc.

5. **Interrelationships**

What contacts are you required to make with persons, both within and outside the University?

a.) Contacts within the University:

Category of Persons Contacted

Nature of Contacts

Frequency

b.) Contacts outside the University:

<u>Category of Persons Contacted</u>	<u>Nature of Contacts</u>	<u>Frequency</u>
--------------------------------------	---------------------------	------------------

6. Education

a.) What do you feel is the minimum level of formal education and/or training required to perform your job?

	Min. No. of Years Required	Degree	Course of Specialization
High School	_____	_____	_____
College	_____	_____	_____
Other	_____	_____	_____

b.) Any specialized skills, courses, or technical knowledge required in addition to the above?

7. Experience

What type, and how much, previous work experience is required to perform the duties of your position?

Length of Time

Type of Experience

8. Other Requirements

List any other requirements and/or skills, not covered above, which are necessary for this position.

Appendix B

Some Useful Active Verbs for Use in Job Descriptions

Act, administer, direct, establish, manage, organize, initiate.

Do, execute, implement, perform.

Make, create, design, compose, develop, devise, formulate.

Start, operate, undertake, process, set-up.

Advise, propose, discuss, plan, anticipate, suggest, prepare, schedule, submit.

Endorse, approve, recommend, authorize.

Assign, supervise, delegate, represent, refer.

Expedite, facilitate, collaborate, confer, consult, negotiate, arrange, resolve, act as liaison (not just liaison, please!).

Participate, attend.

Interpret, explain, clarify.

Ensure, check, analyze, ascertain, control, examine, monitor, verify, consolidate, reconcile, compile, assemble.

Determine, discover, investigate, evaluate, correlate, research, survey.

Find, locate, screen.

Draft, write, edit.

Follow-up, maintain, update, review, revise.

Respond, report, react, record, document.

Give, distribute, circulate, disseminate.

Instruct, train, teach, orient, explain.

Some Useful Qualifying Phrases

As requested = duties performed for peers and/or supervisor.

As assigned = duties given by supervisor.

As required = duties performed on own initiative to get the job done.

As appropriate = duties performed within limit of responsibilities or in unusual situations.

According to established procedures = highly limited freedom to act.

Within scope of responsibilities = defined freedom to act.

Some Verbs Which Should Never Be Used

"Handle", "deal with", or "cope with".

"Assist" and "coordinate" shouldn't be used unless a detailed explanation is included.

Appendix C

Helpful Hints: Describing Duties, Skills, Minimum Qualifications

- Describe the work as it is currently being performed.
- Avoid the use of words that have many meanings such as assists, prepares, analyzes or handles. Instead use *action* words with specific meanings such as computes, answers, records, writes, types or decides. Position content, rather than choice of elaborate words, forms the basis for position evaluation.
- Write in the present tense.
- Eliminate unnecessary words and use a succinct, direct style.
- Each sentence should begin with an action verb.
- Include duties which take less than 5% of the time only if:
 - they are critical to the position;
 - they require different skills than the other duties on the list.

Checklist of Common Skills, Knowledge & Credentials

Language Skills and Knowledge

- ☞ Skill in reading to understand technical information in a specific subject matter area.
- ☞ Skill in writing memos, brief narratives or standard form replies.
- ☞ Skill in writing correspondence.
- ☞ Skill in writing formal or technical reports.
- ☞ Skill in speaking at meetings or in difficult one-to-one situations where tact or careful planning is required.
- ☞ Skill in speaking for formal presentations or public speeches.
- ☞ Knowledge of specialized vocabulary (specific type of specialization, e.g., medical terminology).

Office Skills and Knowledge

- ☞ Skill in word processing (specify speed requirement, i.e. 50 wpm).
- ☞ Skill in machine transcription
- ☞ Skill in operating switchboard.
- ☞ Skill in operating photocopier.
- ☞ Skill in operating 10-key adding machine.
- ☞ Skill in operating other office machines (specify).
- ☞ Skill in using computer software such as MS Word, Excel, and Access.
- ☞ Skill in alphabetizing, organizing and maintaining files.

- ✍ Skill in recording data accurately.
- ✍ Skill in checking or proofreading data for accuracy and completeness.
- ✍ Knowledge of bookkeeping principles.

Management Skills and Knowledge

- ✍ Skill in planning and organizing to meet work objectives.
- ✍ Skill in analyzing and solving problems; decision-making skills.
- ✍ Skill in coaching and counseling.
- ✍ Skill in delegating.
- ✍ Skill in forecasting and budgeting.
- ✍ Effective writing and presentation skills.
- ✍ Skill in managing conflict.
- ✍ Skill in developing performance expectations and conducting performance reviews.



Mathematical Skills

- ✍ Basic arithmetic to add, subtract, multiply, and divide.
- ✍ Basic arithmetic to perform operations requiring the use of standard formulas, or a long series of steps (e.g., ratios, percentages, balancing, discounts, simple interest, graphs and table interpretation).
- ✍ Arithmetical ability requiring an understanding and adaptation of algebraic formulas.

Helpful Hints; Describing Minimum Qualifications

- ✍ Check the duties
- ✍ Make sure the knowledge skills and experience make sense in light of the duties.
- ✍ To describe skills and knowledge, you may find it helpful to read through each job duty.
- ✍ The answer to the questions, "If I were to hire someone to do this duty, which skills, knowledge and experience would he or she need?" describes specialized skills and knowledge.

Appendix D

 Minutes Per Day	Percentage of Time Chart			 Percentage
Per Day	Per Day	Per Week	Percentage	
445 - 480	7 1/2 - 8	37 - 40	100%	
334 - 360	5 1/2 - 6	28 1/3 - 30	75%	
223 - 240	3 3/4	19 - 20	50%	
111 - 120	2	9 1/2 - 10	25%	
90	1 1/2	7 2/3 - 8	20%	
60	1	5 2/3 - 8	15%	
45	3/4	3 3/4 - 4	10%	
20	1/3	2	5%	
18		1 1/2	4%	
13		1	3%	
10		3/4	2%	
5		1/3	1%	

Appendix E Sample Job Description

Building Supervisor (Part time/Seasonal)

Revised 7/99

Library Assistant III

Grade 13

General Summary of Position:

Duties include supervisory and security responsibilities in ODY and the Science Library. Some special project hours in other departments are available on a limited basis.

Examples of Duties/Responsibilities

- Assuring desk coverage in public services areas.
- Supervising student workers.
- Interacting with public regarding library policy and providing assistance to patrons.
- Security - including overseeing closing procedures and reporting problems to Physical Plant or University Security.
- Circulation activity - may include shelf reading, stack maintenance, shelving and patron assistance.
- Interlibrary Loan activity - may include processing incoming and outgoing books and photocopies, photocopying.
- Maintenance of computer and photocopy equipment in the library, e.g. replacing paper, fixing jams, reporting problems, turning off machines, et.

Projects:

The opportunity exists for Building Supervisors to participate in a range of library operations through project-specific assignments in a number of different departments. Projects are offered to broaden and expand the contribution of the Building Supervisors. Participation is voluntary, hours limited.

Qualifications:

- 1. Education:** Required: High school diploma (or equivalent)
Preferred: College course work
- 2. Experience:** Required: Two-three years previous work experience
Experience with computer applications
Preferred: Related experience in a library
- 3. Skill/Physical Requirements:**
 - Ability to work successfully in a busy, potentially stressful environment
 - Time management skills

- Communication skills
- Attention to detail
- Visual acuity
- Normal physical agility/flexibility
- Ability to organize a wide variety of tasks
- Ability to work independently
- Ability to work with the public in a service oriented environment

D. SUPERVISION RECEIVED: *Access Services Librarian*

E. SUPERVISION EXERCISED: *Student Workers*