Writing an Effective Position Description

Administrative Professional & State Classified

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MyHR Working Together

Colorado State University

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How do you give Human Resources the correct information to quickly and efficiently classify your position?
Presentation Outline

- Essentials of a Position Description
- Elements of a Position Description
- Required & Preferred Qualifications
- Essential Job Duties
- Functional Attributes
- Administrative Information
- Supplemental Documentation & Org Charts
Essentials of a Position Description
We need to understand what a Position Description really is...

Definition: A formalized statement of the duties, qualifications, and responsibilities of the position. It may include information on working conditions, tools and equipment used, and relationships with other positions.

Purpose

- Aiding in recruitment and selection of the right candidate
- Defining duties and responsibilities – outlining expectations
- Assisting in performance evaluation
- Determining the appropriate classification (AP or State Classified)
- Designating exemption status under Fair Labor Standards Act (FLSA)
- Identifying functional attributes – American with Disabilities Act (ADA)
- Limiting legal exposure to issues such as equal opportunity and discrimination laws
When to Write or Update a Position Description

When an appointing authority creates a new position

When an appointing authority is filling a vacant position that has changed in duties or responsibilities

When permanent and substantial changes have been made to the duties and responsibilities of a filled position

When department practice dictates. For example, some departments require an annual review of position descriptions, sometimes as part of annual performance planning. This is recommended practice that will help ensure current and accurate position descriptions.
Four Characteristics in Effective Position Descriptions

1. Define the position, not the person

2. Detail information about the current position, not what it might be, or used to be

3. Are easily read and understood Simple/Concise

4. Honest wording and a true reflection of the position

#4 is crucial because if the position description is not honest and accurate, the employee could make reports to outside agencies and CSU could be legally and financially penalized.
True/False

A position description should be written with an individual in mind

False! The position description should define the current position, not an incumbent or possible candidate.
Who Should be Involved in the Information Gathering

- Supervisor
- Employees
- Human Resources
Five Basic Questions That Need To Be Answered

- What is done and what is required to do it?
- How is it done?
- Why is it done?
- When is it done?
- What is the general purpose of the position?
Elements of a Position Description
Elements of a Position Description in TMS

- Position Justification
- Classification Selection
- Position Details
- Essential Job Duties
- Functional Attributes
- Position Budget Information
- Background Check Requirements
- Supervisory Position
- Position Documents
- Position Request Summary
Modify or Create a New Position Description in TMS?

State Classified – When an occupied position is reviewed and position description is updated it is referred to as a job audit

Administrative Professional – Questions to ask when modifying or creating a new position

Modification – when there is an existing position number

• Are the duties of the position changing (adding/subtracting)?
• Will the current position description be used to backfill?
  ➢ Example: The position description is occupied and the duties are changing. Or, the position is vacant and it is changing from how it was written previously.

Create New – no position number exists

• Are these new duties that no one is currently performing?
• Is this a conversion from State Classified to Administrative Professional?
  ➢ Example: If no position number currently exists and the duties are new to the department or are being restructured from other positions.
Working Title

Specific to the work performed. Should appropriately describe the level, responsibility, and type of work. Use titles that are known in your industry.

<table>
<thead>
<tr>
<th>Good Working Titles</th>
<th>Working Titles that Need Improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Director of the XYZ Program (AP)</td>
<td>Professional/Individual Contributor II (Oracle Title)</td>
</tr>
<tr>
<td>Architectural Project Manager (AP)</td>
<td>Assistant Coordinator</td>
</tr>
<tr>
<td>Assistant Director of Admissions (AP)</td>
<td>Program Coordinator</td>
</tr>
<tr>
<td>Help Desk Support Analyst (SC)</td>
<td>Assistant Director</td>
</tr>
<tr>
<td>Lab Support II (SC)</td>
<td>Chief Financial Officer of XYZ Department</td>
</tr>
<tr>
<td>Business Manager (AP/SC)</td>
<td>Diagnostic Procedures Technician II</td>
</tr>
</tbody>
</table>

Any new Executive Director, Director, Associate Director, Assistant Director, Chief Financial Officer, and Chief Operating Officer title requests require approval by the President’s Office.
The ‘Justification of Need’ should include any organizational changes, business needs (e.g. extended hours, new services, and/or position vacancies) which explains the reason for the position.

If more than one position will be filled from the search, additional position descriptions will need to be submitted.

Important info – Only select ‘Yes’ if this position is 100% grant, gift, external funding. If the position is only partially grant funded, select ‘No’ but list the budget breakdown (funds and percentages) in the Source Funding box.
Position Details

Complete the information on the ‘Position Details’ tab

Tip! – Will be determined by HR upon review of Position Description
Tip! – Both the ‘Proposed Annual Salary Range’ and ‘Salary Basis’ are required for proper FLSA classification (AP Only)
## FLSA Determination

Primary duties and salary must meet all requirements of the FLSA to be exempt from overtime.

Position titles do not determine exempt status.

<table>
<thead>
<tr>
<th>Salary Basis Test</th>
<th>Duties Basis Test</th>
</tr>
</thead>
<tbody>
<tr>
<td>Positions paid on a salary basis with a minimum salary threshold of $913 per week, $47,476 annually</td>
<td>Positions are evaluated based on the primary exempt duties</td>
</tr>
<tr>
<td></td>
<td>• Computer Exemption</td>
</tr>
<tr>
<td></td>
<td>• Administrative Exemption</td>
</tr>
<tr>
<td></td>
<td>• Professional Exemption</td>
</tr>
<tr>
<td></td>
<td>• Executive Exemption</td>
</tr>
<tr>
<td></td>
<td>• Agricultural Exemption</td>
</tr>
</tbody>
</table>

When the FLSA exemption status is questionable, **THE DESIGNATION WILL BE NONEXEMPT**.
Description of Work Unit & Position Summary

Mission statement, services provided by department, marketing language, etc. that will populate the job posting.

Position Summary
Description of Work Unit

Describe the unit/program, its purpose, and how it fits in the University.

Only talk about the work unit/department/college. This information can be pulled from the website and copied from one position description to the next.

Chance to sell the unit/program and CSU. Why is your department the best (bragging rights)? What separates it from other departments at similar institutions?
Position Summary

Brief summary including

- Describe the purpose of the position
- Why does this position exist?
- Market the position to interested applicants
- Connect the overall objectives for the position with the mission of the unit/program
- What is the overall end result expected of this position?
- To whom does this position report?

Do not copy and paste the Job Duties into the Position Summary!
Exercise 1

Write 2-4 sentences of a Position Summary for the position you currently hold. Refer to the provided examples of Good and Bad Position Summaries for guidance.
Position Supervises/Decision Making & Complexity/Conditions of Employment

Tip! – We’ll go into these two sections in following slides as they are crucial in the evaluation process.

Tip! – Fill in the boxes next to the Conditions of Employment to further define the requirements. (See example for Valid Driver’s License.)
Position Supervises

Does this position supervise or provide work direction to other positions?

Provide titles, position numbers, and FTE

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**Important info**

Do not forget to add supervisory duties to the Essential Job Duties section along with the percentage of time involved performing these duties.

Also, if this position does supervise other positions, please ensure the organizational chart is updated with this information and uploaded in the Position Documents section.
Decision Making

Decision Making is critical to the evaluation process. Provide specific examples of decisions at the highest level of significance that are related to the Essential Job Duties of the position, are regular and on-going, do not require supervisory approval, and determine how the duties are performed.

- Does this position have authority to make decisions about aspects of their work?
- At what point is the position required to request some type of approval?
- Provide examples of regular, day-to-day decisions made by this position and challenges faced.
- What is actually done? What is the level of accountability?
Complexity

Provide examples of typical problems or challenges encountered by this position, and the guidance used to resolve the problem (i.e. manuals, laws, rules, policies, etc.)

What is the authority in the budgetary process?

What is the responsibility for tracking, creating, allocating, or approving the unit budget?

Once a decision is made, what is the consequence of error (impact to team, department, University)?

What is the role in creating, approving, and/or implementing policies?
Exercise 2

On the line to the left of each statement, determine and write if they are a Decision Making statement, Complexity statement, or neither.
Required & Preferred Qualifications
Required & Preferred Qualifications

Select the appropriate Hiring Authority to ensure the position moves through the approval process.

Tip! – For State Classified positions, minimum qualifications are designated by the State.

For AP positions, minimum qualifications are determined by the department but must follow established degree standards.
## Required & Preferred Qualifications

These two sections describe the specific job qualifications considered to be measurable factors.

<table>
<thead>
<tr>
<th>Experience (Generally Required)</th>
<th>Training/Education (Generally Required)</th>
<th>Knowledge, Skill &amp; Ability (Generally Preferred)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time spent working and training in the use of equipment, materials, or technology needed to complete the job tasks. How long should the incumbent have worked in this job or in closely related jobs? When designating years of experience, remember it’s a minimum threshold required to successfully perform in the position.</td>
<td>Formal learning or training necessary for the development of sufficient mental or physical capabilities to complete job assignments. Verify that the educational requirements are not unrealistically high or low, and are relevant to the job.</td>
<td>Some basic questions to answer are: 1. What body of knowledge is preferred to be a top performer? 2. What type and level of skills are preferred? 3. What abilities are preferred for this position?</td>
</tr>
<tr>
<td><strong>Education</strong></td>
<td><strong>License/Certification</strong></td>
<td></td>
</tr>
<tr>
<td>----------------</td>
<td>--------------------------</td>
<td></td>
</tr>
<tr>
<td>Designate the <strong>minimum</strong> level and type of education <strong>required</strong> to be successful at the job as well as any acceptable substitutions</td>
<td>Designate any licenses or certifications <strong>necessary</strong> to do the job</td>
<td></td>
</tr>
</tbody>
</table>

**Applicants must meet the minimum qualifications to proceed in the selection process.**

**Experience**
Designate the **minimum** level and type of experience **required** to be successful at the job as well as any acceptable substitutions

**Motor Vehicle Record (MVR) checks must include the following statement in the Minimum Qualifications:**

“Must have a valid driver’s license or the ability to obtain a driver’s license or access to a licensed driver by the employment start date.”
Degree Requirements - Admin Professionals

“...the exercise of discretion, analytical skill, judgement, personal accountability, and responsibility for creating, developing, integrating, applying, or sharing an organized body of knowledge.”
- House Bill 11-1301

Acquired through education or training that meets the requirements for a bachelor’s or graduate degree or equivalent specialized experience;

AND

Continuously studied to explore, extend, and use additional discoveries, interpretations and applications and to improve data, materials, equipment, applications, and methods.
Degree Requirements - AP vs SC

Administrative Professional

• Degree requirement in (a list of related degrees) or closely related field
  ➢ Example: “Bachelor’s degree in Business, Public Administration, Communication, Liberal arts or a closely related field.”

• Degree requirement (this could be generic or have a list of related degrees) AND two years of experience (specific position related experience)
  ➢ Example: “Bachelor’s degree in Business, Public Administration, Communication, Liberal arts or a closely related field OR a Bachelor’s degree with a minimum of two years experience as a development officer, or major gift officer, in an institution of higher education or equivalent complex organization.”

State Classified

• The Colorado Department of Personnel and Administration has defined minimum qualifications for all State Classified positions, including various degree requirements or substitutions (see Resources slide for link)
Preferred Job Qualifications

“Well, it would be nice if the candidate had these qualifications too.”

“True. But they have to be preferred and not required. They’re not absolutely necessary to perform these job duties.”

Example...

Required
- Bachelor’s degree in Human Resources, Business, or related field
- Three years of professional experience within Human Resources

Preferred
- Master’s degree in Human Resources, Business, Industrial/Organizational Psychology, or related field
- Experience in Higher Education
- Experience with an Applicant Tracking System
- Certified Professional in Human Resources
- Ability to present information to a diverse population
Exercise 3

Write 3-5 Preferred and Required Qualifications for the position you currently hold.
Essential Job Duties
1. Essential Job Duties include job duty category, responsibility, and percentage of time.

2. All Essential Job Duties should add up to 100% for the ‘Percentage of Time’ – even for part-time positions.

3. Summarize the Duties/Responsibilities with a title for the ‘Job Duty Category’.

4. Each job duty should begin with a verb and end with an explanation of how the action is completed.
Essential Job Duties

A few things to remember while writing Essential Job Duties:

- List in order of importance and percentage of time for each duty. **All percentages must add up to 100%!**
- Make sure that the description of current job duties is honest, truthful, and accurate.
- If this position supervises employees, don’t forget to add Supervisory duties with the percentage of time performing these duties.
- Document current, permanent, primary job duties. Do not include temporary, incidental assignments, or duties performed due to absence of another employee.
- What the position currently does, not what was done in the past or may be done in the future.
- What is done?
  - How is it done?
  - Why is it done?
Essential Job Duties

How to properly structure Essential Job Duties

**Action Verb / Object / Explanatory Phrase**
(Activity/Action Accomplished/Why or How)

Example:

Analyzes *(action verb)* the data *(object)* to identify job content and critical evaluation issues *(explanatory phrase)*.

Collaborates *(action verb)* with hiring managers *(object)* to establish recruitment strategies, and determine comparative analysis methods for evaluative assessment criteria *(explanatory phrase)*.
**Essential Job Duties**

**Bad:** Responsible for office equipment.

**Good:**
- Arranges routine maintenance, orders necessary supplies, and contacts vendors for required repairs of all office equipment including copiers, printers, and fax machines – 40%

**Bad:** Handle administrative tasks.

**Good:**
- Receives, sorts, and files monthly personnel actions reports
- Edits and types grant documents, department newsletter, presentations, etc.
- Composes routine correspondence for the manager from general verbal instructions – 40%

**Bad:** Sometimes will create reports.

**Good:**
- Generates accounting reports using the Kuali system to determine current budget status – 20%
Memory Check

List the three components that should be included in the structure of essential job duties

Action Verb/Object/Explanatory Phrase
(Activity/Action Accomplished/Why or How)
Exercise 4

Go through the list of Essential Job Duties and indicate if they are good or bad on the line to the left of the duty. Then, choose three of the duties you determine to be bad and show how you would improve them.
Functional Attributes
Use the drop-down menu to complete sections for Physical Demands, Mental Functions, Environmental Conditions, Physical Surroundings, and Hazards associated with the position.

Functional Attributes

Establishes the environment in which the job is performed

Tip! – Click ‘Link to full definition/description’ to better understand the terms

Important info – Functional Attributes can be used for ADA, Worker’s Compensation, and FML. Please complete this section regardless of position.
Administrative Information
On the Position Budget Information tab click on the ‘Add Budget Summary Entry’ button to complete the Budget Account Number, Percentage Funded, and Budget Account Name.
Background Check Requirement

Tip! – Please note the Help Text regarding background checks for all new hires.

Important Info - Is a regular or commercial driver’s license required to perform the duties of this position (If Yes, check appropriate Motor Vehicle Record boxes.) The following statement must be included in minimum qualifications:

“Must have a valid driver’s license or the ability to obtain a driver’s license or access to a licensed driver by the employment start date.”
Choose the Supervisor for this position. The Direct Supervisor may be different than the Hiring Authority previously designated.
Supplemental Documentation & Org Charts
## Position Documents

Uploads will be converted to PDF documents.

PDF conversion must be completed for the document to be valid when applicable.

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Name</th>
<th>Status</th>
<th>(Actions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organizational Chart</td>
<td></td>
<td></td>
<td>Actions</td>
</tr>
<tr>
<td>FLSA Form</td>
<td></td>
<td></td>
<td>Actions</td>
</tr>
<tr>
<td>State Classified PDQ - Physical Copy (NEW)</td>
<td></td>
<td></td>
<td>Actions</td>
</tr>
<tr>
<td>State Classified PDQ - Physical Copy (PREVIOUS)</td>
<td></td>
<td></td>
<td>Actions</td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td>Actions</td>
</tr>
<tr>
<td>State Classified - Individual Allocation Notice</td>
<td></td>
<td></td>
<td>Actions</td>
</tr>
<tr>
<td>State Classified - Individual Allocation Report</td>
<td></td>
<td></td>
<td>Actions</td>
</tr>
<tr>
<td>State Classified - Employee Certification of Position</td>
<td></td>
<td></td>
<td>Actions</td>
</tr>
</tbody>
</table>
Necessary Information on an Org Chart

Name (or Vacant)       Jane Smith
Working Title          Manager of Santa Land
Classification         BUMG01
Position.version#      021351.0001
Resources

For inquiries you can connect with our Classification/Compensation or Employment Unit representatives. Their contact information is found on our website:

http://www.hrs.colostate.edu/contacts/

Colorado Department of Personnel and Administration
Job Classification Descriptions and Minimum Qualifications for State Classified positions:
https://www.colorado.gov/pacific/dhr/classdescriptions
Questions