



Human Resources Training

Performance Management Training Module 1:

Position Descriptions

Classified Employees

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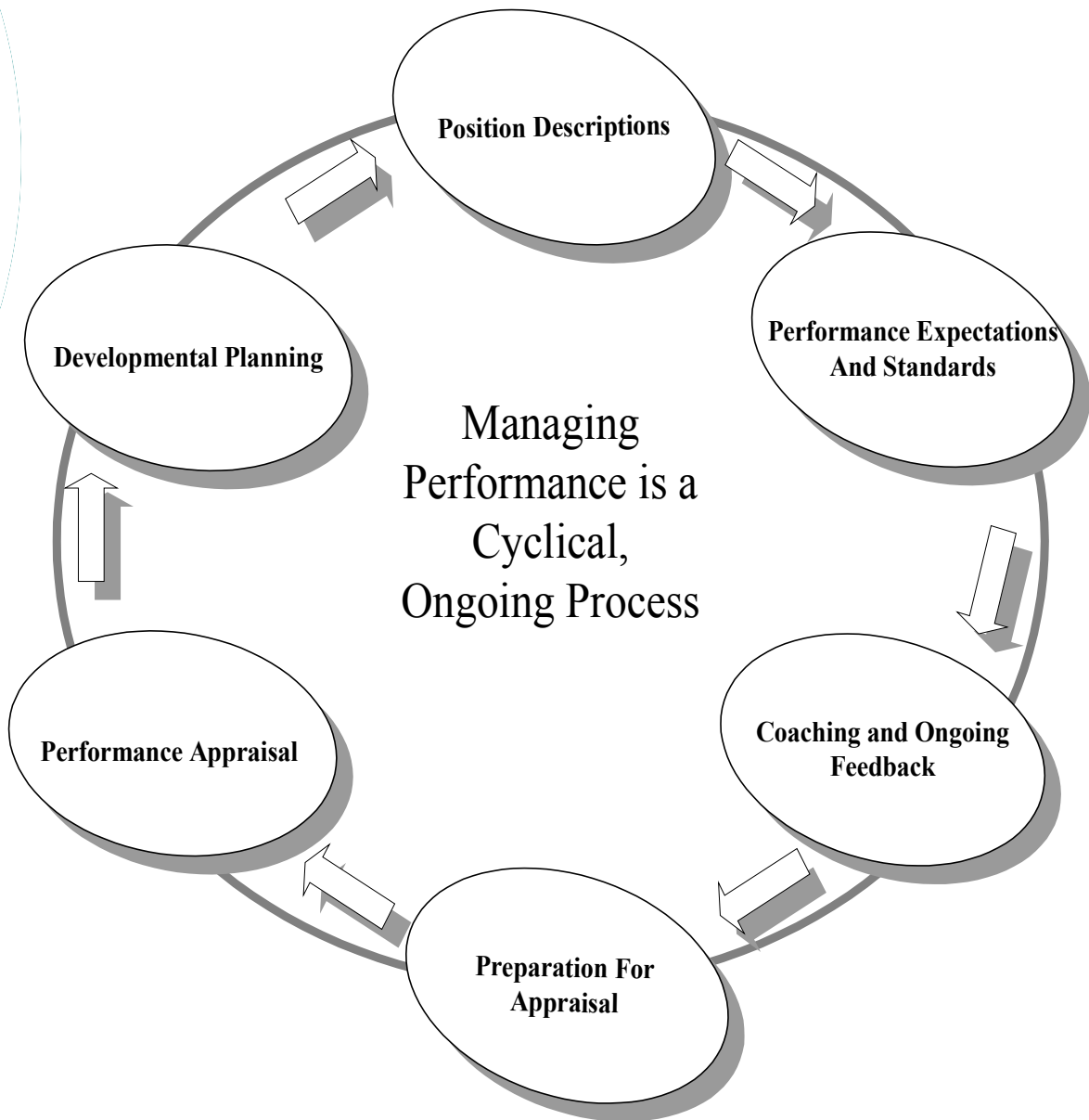
Objectives:

- Identify the Position Description in the Performance Management Cycle
- Understand the Purpose and Importance of a Position Description
- Go through the 12 Sections of a Classified Employee Position Description

Components of the Performance Management Cycle

1. **Position Description**
2. Performance Expectations and Standards
3. Coaching and On-going Feedback
4. Preparation for an Appraisal
5. Performance Appraisal
6. Developmental Planning

Performance Management Cycle



Purpose of a Position Description

1. Relates the position (a job) to the organization's mission
2. Clearly describes a job within an organization
3. Describes the special requirements of a job
4. Creates an agreement between the employee and the supervisor
5. Forms the foundation of Performance Management

Purpose of a Position Description

(continued)

A PD is necessary and basic to:

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

12 Sections of the Position Description

1. Position Information
2. Program and Position Information
3. Description of Duties
4. Working Conditions
5. Guidelines
6. Work Contacts
7. Job-Related Decision Making
8. Review of Work
9. Leadwork or Coordination of Duties
10. Additional Job-Related Information
11. Organizational Chart
12. Signatures

Section 1:

Position Information

- a. Class Title: This is the name of the class specification as listed in the Oregon University System Class Specifications. <http://www.ous.edu/dept/hr/classification-specs/>
- b. Class Number: This is the class specification number. (e.g. Office Specialist 1 is Class# 0103).
- c. Position Number: This is the position number assigned to this position.
- d. Working Title: This is the general term used when referencing the job. (e.g. an Office Specialist 1 class may be working as a Receptionist, Records Specialist, Office Support, etc.)
- e. Work Unit: Identifies the name of the specific Unit/Office where this position works.
- f. Work Location (City/County): Monmouth – Polk
- g. Employee Name: Identifies the name of the employee who is filling the position and will be signing this specific position description.
- h. Effective Date: Identifies the initial date the employee was assigned into the position. This date **does not** change if the position is revised, reviewed and re-signed by the employee as part of the Performance Evaluation process.

Section 1:

Position Information

(continued)

- i. Position: This information refers to the position not the employee. Check the correct box in each row for the specific position:
- It will be either a Regular, Seasonal, Limited Duration, or Academic Year position.
 - It will be either a Full Time, Part Time, Intermittent position.

Note: If Limited Duration is checked, you may want to add the scheduled end date. WOU does not have any Job Share positions.

- j. FLSA: This is the Fair Labor Standards Act (FLSA) designation.
- Mark “Exempt – Not eligible for Overtime”
OR
 - Mark “Non-Exempt – Eligible for Overtime”.

Section 2: Program/Position Information

Describe the Program:

- How the program contributes to the purpose of the University.
- Include general information about Program size (employees, budget), and scope (geographic region, statewide)
- Who or what the Program affects.
- If copying boiler plate language about the University, Section and/or Unit, it is still important to add a separate paragraph describing the Program(s) it contains.

Section 2: Program/Position Information

Describe the Purpose of the Position:

- Briefly summarize why the position exists
- How the position functions within the Program.
- Indicate its role in reaching the Program objectives (e.g., supportive, technical, supervisory, program manager).

(Think in terms of briefly describing the position to a friend.)

Section 3: **Description of Duties**

List the **Major Duties**, or most important task and/or responsibility statements.

- Task or responsibility statements should give a clear picture of what the employee must do.
- Do not include employee development or temporary duties.

Section 3:

Description of Duties

(continued)

Note the **Percent of Time** for each Duty listed.

- It should be an approximation of how much time per week the employee spends performing that duty.
- If the duty is performed on a less than weekly basis, but it is essential to the job, you may want to estimate percentage of time based on number of hours spent performing that duty during the month/year; important for cyclical functions.
- It is not necessary to list duties below 5% of time because the PD should list only major duties, unless the duty is essential for that position.

Section 3: **Description of Duties** (continued)

Indicate if the duty is a **New (N)** or a **Revised (R)** duty.

- Revised means there is a change in how the duty is being performed.
- Changing how the duty is described for clarity would not warrant marking (R) for revised, unless how the duty is completed has changed.

Section 3:

Description of Duties

(continued)

Essential Functions (EF)

- An Essential Function is a critical duty – there is a consequence if the duty is removed.
- Mark “**EF**” to indicate each duty listed as an Essential Function **if**:
 - The position exists to perform the function.
 - There are a limited number of other employees available to perform the function or, among whom the function can be distributed; **OR**
 - The function is highly specialized, and the person in the position is hired for special expertise or ability to perform it.

The employee in the position **must** be able to perform these functions (critical duties) unaided or with the assistance of an approved reasonable accommodation (ADA).

Section 4: **Working Conditions**

This section describes:

- Specific working conditions.
- Danger of injury and other risks that are out of the ordinary.
- How often such conditions are present.

Note - If a more detailed analysis of physical and mental requirements is needed to assure compliance with governing regulations, contact the Office of Human Resources for assistance in conducting a job analysis.

Section 5: Guidelines_

List established guidelines used to do this job:

- List State and/or Federal laws or regulations, policies, manuals or desk procedures.
- Be specific; if guidelines are related to certain program(s), indicate the related laws, rules, policies and procedures that support the program(s).

Describe how the employee uses these guidelines to perform their job:

- Be specific as to how and/or when the employee uses the specified guidelines in performing the duties assigned to the position

Section 6: **Work Contacts**

Identify people or groups of people with whom the employee has contact within the normal course of doing assigned work; such as:

- Clients, students, faculty, residents, support staff, employees in other agencies, legislators, regional or national Federal employees, people in other governmental or public organizations.

Describe how the employee makes contact:

- By telephone, in person, in writing, etc.,
- Why they make the contact (i.e., exchange of information, explain rules, etc.), and
- How often they have contact with each (i.e., daily, once a week, once a month, etc.).

Section 7: **Job-Related Decision Making**

State specific examples of the **typical** decisions made by the employee to illustrate the position's authority; such as:

- Sets work priorities, hires staff, selects and orders equipment, or approves benefits.
- Include the ramification(s) of the decisions.

(Note: Sometimes it is more helpful to identify the consequences of an incorrect decision.)

Section 8: **Review of Work**

Identify the position that supervises and reviews the work assigned to this position; list their -

- Position title,
- Position number, and
- Explain the method, how often, and why the supervisor reviews their work.

Note: If more than one position provides review, identify both position titles and position numbers, and explain their respective methods, how often, and why the work is reviewed by each.

Section 9: **Leadwork or** **Coordination of Duties**

Indicate which leadwork or coordination activities this position performs on a regular basis.

Check the appropriate boxes that apply to this position:

- Trains Employees;
- Assigns Work;
- Directs Work Procedures;
- Reviews Work,
- Provides Informal Work Review to Supervisor.

Section 9: **Leadwork or** **Coordination of Duties**

- This section should be interrelated to the "Description of Duties" (Section 3), and "Job-Related Decision Making" (Section 7).
- If the position has regularly assigned responsibility for some or all of the tasks boxes listed, make sure these tasks are specified in Section 3 (Description of Duties), and identify the percent of time, whether it is New or Revised, and whether it is an Essential Function of the position.

Section 10: **Additional Job-Related Information**

- This section provides an opportunity to add any additional job-related information not captured in the other sections of the Position Description.
- This information is often important for recruiting purposes.

Section 10: Additional Job-Related Information

Special Requirements:

- Note special licenses, certifications, registrations or permits **required** by law, rule or regulation for the position to perform its assigned duties.
- Include any specific knowledge and skills required for the position at the time of hire that are not already in the class specification.
- Indicate if an employee must meet a special requirement (i.e. license, certification, special skill(s), etc.) and identify the time frame allowed to meet the requirement.

Section 10: **Additional Job-Related Information**

Budget Authority:

- Indicate in what area the position has authority to approve funds (i.e. Personal Services, Supplies & Services, or Capital Outlay)
- Indicate how much, or the authorization limit and time frame.

Section 11: **Organization Chart**

Indicate the organizational structure associated with the position; in each box show:

- Name
- Position Title

If this is a leadworker position, list employee names and position titles for each position for which this position provides leadwork.

Section 11: **Organization Chart**

Rather than use the boxes, it is better to attach a current expanded organizational chart to the position description.

If an organizational chart is submitted, be sure the following information is shown on the chart for each organizational box:

- Position Title
 - Classification Number (where applicable)
 - Salary Range
 - Employee Name
 - Position Number
-
- Highlight or clearly designate the subject position.
 - Identify at least two levels of supervision above the subject position.
 - Identify all other positions directly reporting to the same supervisor.

Section 12: **Signatures**

- The position description is an official statement of the work assigned to the designated position.
- The date on the signature line indicates the date the most updated position description was reviewed.

Section 12: **Signatures** (continued)

Signatures certify the following:

- **Supervisor** - certifies that the form is the most recent version of the position description and contains complete and correct information describing the job that immediate supervisor wants this position to do. The signature also certifies that the supervisor has reviewed the completed form with the employee and has provided the employee a completed signed copy of the position description.
- **Reviewer** – certifies that the form has been reviewed and approved by the supervisor’s manager/director; and confirms the job and performance expectations identified.

Section 12:

Signatures

(continued)

- **Employee** - certifies that the employee has had the opportunity to review the form with the supervisor, has received a signed copy and understands that it reflects the job the employee is expected to perform while assigned to the position.
- **Appointing Authority** - certifies that the position description form has been reviewed by the Office of Human Resources for accuracy and completeness and that it is the most current official document reflecting the job duties and responsibilities assigned to that position.

Article 20 Differential Pay

Article 20, Differential Pay, of the current SEIU Collective Bargaining Agreement, has a number of differential payments that come into play when specific duties are assigned to classified employees. These specific duties and/or responsibilities should be reflected in their position description or documented in writing.

Section 3. Special Qualifications Pay:

- (A) Bilingual - provide Spanish and ASL interpretation
- (D) Special Campus Security Officer Differential - serve as Campus Public Safety Officer

Section 4. Shift Differential

- Salary range 23 and below
- Scheduled to work between 6:00 pm and 6:00 am, and on weekends

Article 20

Differential Pay

(continued)

Section 5. Lead Work Differential

- For 2 or more employees
- At equal or lower salary range
- For at least 10 work consecutive **work days** or longer
- Directed to do all of the following duties on a recurring basis
 - Orient new employees
 - Assign and reassign tasks to workers to accomplish prescribed work
 - Provide direction regarding work procedures
 - Communicate performance standards to workers
 - Review worker performance for conformance to standards
 - Provide informal assessment of worker performance to supervisor
- Specific classification are assigned Leadworker for 4 or more student employees that work 40 hours or more for each week.

Article 20

Differential Pay

(continued)

Section 6. Work Out-of-Classification

- Assigned duties of a higher level classification
- For more than 10 consecutive **calendar days**
- Begins from the first day of the assignment for the full period of the assignment
- No differential pay for training or developmental purposes; must be in writing and include the purpose and length of the assignment

For assistance and additional
information, contact:

Bill Sexton

Office of Human Resources

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