

Human Resources Training

Performance Management Training Module 1:

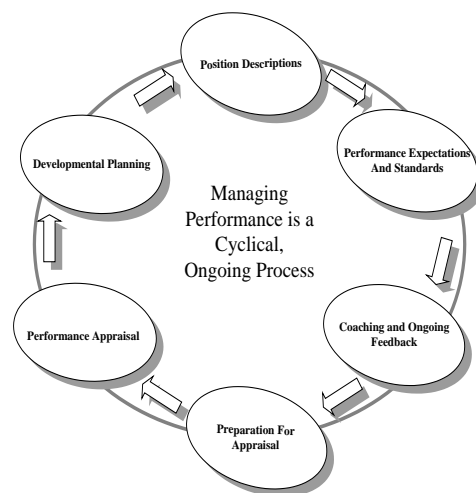
Position Descriptions

Classified Employees

The Performance Management Cycle is an on-going cycle. It has six main components. They are:

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



4

The **Position Description** is the **foundation component** of the Performance Management Cycle.

The 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

Why is a position description important? Why is it important for an employee to have this information? Why is it important for the University to have this information documented? Why is it important for us to have a current up-to-date PD when we recruit for a position?

The answer is that the PD is necessary and basic to all of the following critical employee and position issues:

- 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.

There are 12 Sections in a Position Description: (Classified Form)

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

Worthy of special note is the identification of the Essential Functions of a position. This is a critical function of the Position Description, and is often overlooked when a position description is developed. The Essential Functions of a position are identified in the position description in Section 3, Description of Duties. Identifying which duties are Essential Functions of the position is necessary in order to comply with the American with Disabilities Act (ADA) requirements.

Position Description Form for Classified Employees

Provide complete information on the form and remember to attach a current organization chart with the subject position highlighted.

Remember, when using abbreviations, give an initial explanation of what they mean (e.g., WOU [Western Oregon University]).

Completion of A Classified Position Description (PD) Form by Section

Section 1 - Position Information

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/>

Class Number: This is the class specification number. (e.g. Office Specialist 1 is Class# 0103).

Position Number: This is the position number assigned to this position.

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.)

Work Unit: Provide the name of the specific Unit/Office where this position works.

Work Location (City/County): Monmouth – Polk

Employee Name: This is the name of the employee who will be signing this specific position description.

Effective Date: Show 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.

Position: This information refers to the position not the employee. Make sure you check the correct box in each row for the specific position. The position will be either Regular, Seasonal, Limited Duration, or Academic Year. Also check whether the position is Full Time, Part Time, Intermittent, or a Job Share position. (Note: If Limited Duration is checked, you may want to add the scheduled end date.)

FLSA: The FLSA (Fair Labor Standards Act) exemption status applies to the position, not a position classification. Check either Exempt – Not eligible for overtime, or Non-Exempt – Eligible for overtime. Some general reminders:

- Base FLSA Exemption on individual job content.
- The salary range alone does not make a position Exempt.

- Union Contracts may stipulate overtime provisions differently from the FLSA. These Contracts may create overtime obligations beyond the FLSA. However, they may not limit or restrict application of the FLSA. Contact the Human Resources Office for clarification regarding Contract overtime provisions.
- Contact the Human Resources Office for assistance in determining if the position qualifies as Exempt under one of the three FLSA Exemption Criteria.

Section 2 - Program and Position Information

Describe the Program in which the position exists. State how the program contributes to the purpose of the University. Be sure to include general information about Program size (employees, budget), scope (geographic region, statewide) and who or what the Program affects. If copying in boiler plate language about the University, Section and/or Unit, it is still important to add a separate paragraph describing the Program(s).

Describe the purpose of the position, and how it functions within the Program. Briefly summarize why the position exists and its role in reaching your Program objectives (e.g., 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. For example:

- Example: The purpose of this position is to direct and monitor the work of technical and professional employees of the Accounting Office, who receive and process invoices for payment and verify compliance with government accounting rules and regulations.

Section 3 - Description of Duties

Describe the **Major (or most important) Duties** (task or responsibility statements) assigned to this position. Be sure the task or responsibility statements give a clear picture of what the employee must do in the position. Do not include duties assigned solely for employee development or temporary duties.

- Begin each statement with an action verb that describes the activities, whether physical or mental.
- Do not include marginal job functions.
- Be specific and complete. The duty statements should include what the employee does, how he or she does it, to whom or what and for what purpose.
- Avoid ambiguous terms. Using terms such as “assists,” “handles” and “prepares” without further explanation of how it occurs is invariably a sign

of inadequate information. Using the word “by” and then writing the task, or processes (the “how” it is done), will add clarity to the described duty.

- If this is a lead worker or coordinator position, include those responsibilities within the descriptions of duties.

The **Percent of Time** should be an approximation of how much time per week the employee spends doing the task. If the function is done on a less than weekly basis, but the function 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 this document should list major duties, unless the duty is essential for that position.

For each duty indicate if it is **New (N)** or **Revised (R)**. 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.

Essential Functions (EF) of the Position

Identify the duties (job tasks or responsibility statements) that are an Essential Function of this position by marking an **EF** next to those specific duty statements. This is a critical notation in order to comply with 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 this 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.

Non-Essential Functions are job duties and/or responsibilities that are not critical to this position, or can be assigned to someone else if needed. 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.

Section 4 - Working Conditions

Use this section to describe specific working conditions, including danger of injury and other risks that are out of the ordinary, and include how often such

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

Section 5 – Guidelines

List established guidelines used to do this job (e.g., State or Federal laws or regulations, policies, manuals or desk procedures). Please be specific. If guidelines are related to certain program(s), please indicate the related laws, rules, policies and procedures that support the program(s).

Also, describe how the employee uses these guidelines to perform their job. Please 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 with (out side of co-workers) in the normal course of doing assigned work (e.g., clients, students, inmates, patients, residents, other people within the University, employees in State agencies, legislators, Federal employees at either regional or national levels, people in other governmental or public organizations).

Describe how the employee makes contact (e.g., by telephone, in person, in writing, etc.), why they make the contact (e.g., exchange of information, explain rules, etc.), and how often (e.g., daily, once a week, once a month, etc.) they have contact with each.

Section 7 – Job Related Decision Making

Use specific examples of the **typical** decisions made by the employee in this position (e.g., sets work priorities, hires staff, selects and orders equipment, approves benefits) to illustrate the position's authority. Include the ramification(s) of the decisions. (Note: Sometimes it is easier to identify the consequences of an incorrect decision.)

Section 8 - Review of Work

Describe by position title and position number, the position that supervises and reviews the work assigned to this position. Explain the method, how often, and why the supervisor reviews the work. If more than one position provides review, identify both position titles and position numbers and explain the respective methods, how often, and why the work is reviewed by each.

For example: The Retail Dining Manager (position #) reviews the work at weekly

meetings to discuss problems and to monitor production. The Campus Dining Manager (position #) reviews the work occasionally as needed, and annually in a written job performance review.

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, and/or Provides Informal Work Review to Supervisor.

There should be an interrelationship between this section, the "Description of Duties" section (Section 3), and the "Job Related Decision Making" section (Section 7). If the position has regularly assigned responsibility for some or all of the tasks boxes listed, you should make sure these tasks are also noted in Section 3-Description of Duties, and identify the percent of time, whether it is new are revised, and whether it is an Essential Function of the position.

Section 10 - Additional Job-Related Information

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

Special Requirements: List any special license, certification, registration or permit **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 meets a special requirement (e.g. license, certification, special skill(s), etc.) and identify the time frame allowed to meet the requirement.

Budget Authority: Indicate in what area (Personal Services, Supplies & Services, or Capital Outlay) and how much (biennially).

Section 11 - Organization Chart

Fill in the organizational structure associated with the position; show Name and Position Title in each box. If this is a leadworker position, list employee names and position titles for each position for which this position provides leadwork.

Rather than use the boxes on the PD form, 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 position:

- Each organizational box should include the following information: Position

Title, Classification Number (where applicable), Salary Range, Employee Name and 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. 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 in the position description for this position.
- 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.

Related SEIU Contract Issues - Article 20, Differential Pay

Article 20 of the current SEIU Collective Bargaining Agreement addresses Differential Pay for specific duty assignments. This Article specifies 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 specifically documented in writing. Relevant differential pay employed at Western Oregon University includes:

Section 3. - Special Qualifications Pay:

- (A) Bilingual – assignments to provide Spanish and ASL interpretation
- (D) Special Campus Security Officer Differential – assigned to serve as

Campus Public Safety Officer

Section 4. - Shift Differential – criteria:

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

Section 5. - Lead Work Differential – criteria:

- 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.

Section 6. - Work Out-of-Classification – criteria:

- 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

REMEMBER:

It is important to complete **All** sections of the position description form. If you have difficulty in completing the form, or questions about the form, please contact Bill Sexton at 8-8139 in the Office of Human Resources for assistance.