



**HR PRODUCTS AND SERVICES**

**HR RESOURCE GUIDE**

# **Writing Job Descriptions Resource Guide**

**Provided By**

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# WRITING JOB DESCRIPTIONS

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## **FOREWORD: THE IMPORTANCE OF JOB DESCRIPTIONS**

An increase in employee litigation and legislation has made job documentation a must. While legal implications are reason enough to make sure all of your employees have job descriptions, documenting jobs within your organization is key for each part of your business strategy – from designing effective compensation and employee training programs to meeting broader organizational and human resources goals. Current turnover rates and escalating competition for talent requires that organizations do a better job of matching people to work. Job documentation is the cornerstone of this effort.

The most common type of job documentation is the job description, which identifies, defines, and describes the most important features of a job as it is being performed. This includes the general nature and level of the work, specific duties and responsibilities, and qualifications necessary to perform the job. When properly developed to meet specific needs, job descriptions have the potential for a wide variety of administrative and compliance applications, including:

1. Guidance to employees about what to do and how to do it.
2. Information that can be used in recruiting for the job – not only technical skill requirements, but also information about the “nature” of the person best suited for the work. The importance of hiring qualified people who meet both the “what” and the “how” of a job cannot be overstated!
3. An expertise directory or “who’s who” that enables people in the organization to know who does what and who knows what.
4. Evaluation of the content of one job in relation to other jobs in the organization, with the purpose of developing an effective compensation program. Internal equity assessment cannot be determined or documented without solid job descriptions.
5. Establishment of career paths and succession planning.
6. Serving as a foundation for performance standards for individuals.
7. Determination of essential functions and required mental and physical capabilities to meet requirements of the ADA (Americans with Disabilities Act, affecting employers with 15 or more employees), including providing assistance with identifying reasonable accommodation.
8. Creating a document for physician review in cases of return to work from a worker’s compensation injury or illness, or approval of light duty restrictions.
9. Assistance in documenting why someone was not hired, was placed on a performance plan, was not promoted, or was discharged.
10. Legal defense in the event of a lawsuit alleging discrimination, etc.

This Guide provides a variety of tools to help analyze jobs within the organization and a step-by-step “how to” process for writing meaningful job descriptions. Using this Guide, individuals will be able to:

- Focus job descriptions on actual tasks and duties.
- Understand the specific mental and physical requirements of each job.
- Understand the definition and importance of each section of the job description.
- Create a job description format that will work for the organization.
- Write job descriptions from Job Analysis Questionnaires (JAQ).
- Assess existing job descriptions and make changes that will improve current job documentation.
- Use job descriptions to actively assist in employment legal claims, including ADA, FLSA, and workers compensation situations.

Undertaking an effort to build meaningful job descriptions in the organization can have many benefits. The ultimate benefit is a common language for describing work and positions in the organization, a language that goes beyond technical skills, degrees, and years of experience and gets to the heart of what work is really about – the behaviors, cognitive skills, and social context in which each job must operate. Meaningful job descriptions help define work, which helps employees understand what they are expected to do and assists supervisors and managers to set appropriate expectations. When job responsibilities and roles are commonly understood, productivity and good performance are far more likely.

## INTRODUCTION

### CONTEXT OF THE JOB DESCRIPTION

Job descriptions are a single, but key, component of an overall human resources function. Each component of the HR function involves specific programs designed to achieve key objectives for the organization. These programs include:

- A selection/staffing strategy that links the nature and level of work in an organization with the available skills in the labor market. Job analysis and documentation are a significant component of this strategy.
- A rewards strategy that includes objectives for base pay and other compensation and benefits programs. Within this strategy, job analysis, documentation, and evaluation are important in establishing a job worth hierarchy, which is the perceived value of one job relative to others in the organization. This is the foundation of a base pay program.
- An organization development strategy that may be influenced by how work is assigned, how employee progression is planned, how skills are developed, how succession is determined, etc.

The product of job analysis and documentation are job descriptions that will serve as the underpinning of each of the programs listed above.

### AN OVERVIEW OF JOB DESCRIPTIONS

For most organizations, job descriptions are the cornerstone of many human resources programs. Job descriptions are used to develop interview questions, build compensation programs, develop performance appraisals and training programs, and influence many other business strategies. However, these programs are only as good as the job descriptions on which they are based. In addition, the passage and implementation of the Americans with Disabilities Act (ADA) in 1990 and the ADA Amendments Act of 2009 increased the importance of job descriptions to organizations, becoming a primary vehicle for defining the essential functions and skills required by a position, and serving as the source document for what is reasonable accommodation. The result is that job descriptions are becoming more detailed and work-specific than they've been in the past, with added emphasis on specific mental and physical requirements for each position.

Depending upon its purpose, a job description can be in one of several different formats. The format recommended by HR Answers is designed to clearly identify the essential functions, and define the specific mental and physical requirements of a position. In the following pages, each section of the job description will be defined and explained. Specific examples will demonstrate how the descriptions are written based on the information found in the Job Analysis Questionnaire (see Appendix), and how to build a list of required mental and physical abilities. A shorter version, the Mental and Physical Activities Requirements document, designed to support primarily ADA and recruiting functions, is also provided; however, this option has several limitations that can prevent it from fulfilling all the uses that a full job description can perform.

## GENERAL GUIDELINES FOR WRITING JOB DESCRIPTIONS

While no two job descriptions are the same, much of what they address and their individual content can be very similar. There are no hard-and-fast rules for writing job descriptions, but there are some general principles that can ease the writing process. The following three guidelines can be applied to the construction of all job descriptions.

1. Focus on Actual Tasks and Duties

By focusing on tasks and duties that are observable, measurable, and easily described, the HR professional can develop a document that is easy to understand. Developing essential functions based on observable tasks and duties should significantly reduce confusion and should also increase the usefulness of the job description in performance appraisals, job evaluations, recruitment, and compensation programs. This will also aid in using job descriptions as support to classifying positions as exempt or non-exempt under the Fair Labor Standards Act (FLSA).

2. Be Specific Regarding Mental and Physical Requirements

Clearly defining the *specific* mental and physical requirements of a position can greatly aid the interview process and the compliance support role. Specifying actual requirements can help applicants decide whether to apply for a position, and can serve as a basis for discussion of reasonable accommodations required by the ADA, which requires organizations to make reasonable accommodations to allow those with disabilities to perform job duties.

3. Specify Scope

When defining a position's job duties, it is important to include time and scope components. For example, a job description that calls for typing skills would need to include the required speed and accuracy. A clearly written job description would require, for example, "Accurate keyboarding at 60 wpm." Lifting and carrying requirements should specify how much is to be lifted, how often, and possibly how far the weight is to be carried.

Each of these guidelines can be applied to all sections of the job description. The key is to make the job description as clear and concise as possible. Focusing on tasks and duties, clearly defining mental and physical requirements, and specifying scope components can all help increase clarity.

It is also important to note what a job description *isn't*. It is also important to note that a job description does not set performance standards. These should be established through a different document. Including how fast a phone should be answered, describing the customer service philosophy expectations, or stating how many units are to be created during a shift assumes that each incumbent will be identical regardless of their tenure. Therefore, we strongly discourage including this type of information in a job description.

A Job Analysis Questionnaire provides a basis for gathering the information that is essential for writing a meaningful job description. This questionnaire (included in the Appendix of this Guide) is used to interview supervisors, incumbents, and co-workers to identify and describe the elements of the job, and how it fits into the organization.



## **SECTIONS OF THE JOB DESCRIPTION**

The job description format developed and recommended by HR Answers includes 10 sections:

- Job Title and Header
- General Position Summary
- Essential Functions/Major Responsibilities
- Secondary Functions
- Job Scope
- Supervisory Responsibility
- Interpersonal Contacts
- Specific Job Skills
- Education/Experience
- Job or Working Conditions

### **JOB TITLE AND HEADER**

The Job Title should describe both the nature and the level of work performed, taking into account both internal and external status issues, and avoiding potential discriminating titles such as those that imply gender or age. To ensure that the nature and level of the work is more easily understood, it is also important to refrain from inflating titles. This is especially important to the recruitment process so that you are able to attract the right candidates with the right qualifications for a position. A common issue is labeling a position as a manager when the incumbent is responsible for a function but supervises no people. (See the Title Definitions in the Appendix.)

For the purposes of external relations, a separate job title or business card title may be advisable. For example, the internal title may be Sales Representative, distinguishing the position from those with management responsibilities; however, to convey the appropriate level of autonomy and status, the business card may carry a title of Regional Sales Manager, allowing the job incumbent to benefit from a perceived higher level of status in the customers' eyes.

This section should also indicate whether a job is exempt or non-exempt, based on the provisions of FLSA. FLSA requires most employers to pay overtime to employees in non-exempt jobs. The whole job description must be consistent with and support the classification determined. Other items in the header include organization name, which position the job reports to, and identification of other organizational data.

## **GENERAL POSITION SUMMARY**

The General Position Summary introduces the reader to the position and briefly summarizes its duties. This introductory paragraph consists of no more than three or four sentences that indicate why the job exists, and it may also summarize the essential job functions.

The General Position Summary is covered by Section I of the JAQ.

## **ESSENTIAL FUNCTIONS/MAJOR RESPONSIBILITIES**

This section outlines the essential functions of the position. It should list *only* the essential job functions, all of which must support the reason the job exists as described in the General Position Summary. Essential functions are defined as fundamental or primary job duties of the position. Job duties can be identified as essential based on three criteria:

- The position exists to perform these functions.
- A limited number of employees are available among whom the function can be assigned.
- The function is highly specialized and only a few employees can perform it.

Some positions require regular and dependable attendance because of the consequences of an employee being absent often. If that is the case with a position in your organization, then you may wish to add an essential function that stipulates that “Regular attendance and the ability to work the hours scheduled is considered essential to performance of the job.”

Typically, these functions are listed in order of most important to least important. They are normally short statements that begin with a verb or action word. Usually a job can be described in eight to twelve functions. (See the sample Job Description for examples of this language.)

Essential functions are covered by Section II-A of the JAQ. Section II-C may also include relevant information.

It is necessary to add a statement to the effect that other relevant job duties may be assigned, as a way of ensuring flexibility in adding necessary job duties as the need arises. The following is appropriate wording:

*“This job description reflects management’s assignment of essential functions; it does not proscribe or restrict the tasks that may be assigned.”*

## **SECONDARY FUNCTIONS**

This section lists functions that are not essential or primary, and/or that could be, or are, performed regularly by others. Because the employment provisions of the ADA focus on essential functions, the employer must ensure that all essential functions are covered in the job description and delineated from secondary ones.

The format in this section is similar, if not identical, to the previous section in that it lists job responsibilities in short statements that begin with a verb. Job functions to include in this section are those that are incidental to the position and could reasonably be performed by another position.

Section II-B in the JAQ is devoted to secondary functions. The key is to identify duties or functions that are incidental to the primary duties of the position. These duties cannot be considered when complying with the ADA.

### **JOB SCOPE**

This section describes the complexity and breadth of the position, including information about latitude, discretion and judgment, decision-making, and the impact of errors.

Beginning with a description of the nature of the work, this section describes the guidelines, policies, procedures, and constraints under which the position operates. Such factors typically include the degree of complexity or difficulty, the amount of guidance or direction received, the diversity of work situations, latitude for decision-making, the level of initiative required, and the degree to which the work is reviewed or inspected. In addition, this section addresses the responsibility for records maintenance, potential for impact on expenses, budgets, and work products, accountability for capital assets/equipment, involvement in long-range planning, and impact of errors.

Section III-A through E in the JAQ addresses demands and complexity.

### **SUPERVISORY RESPONSIBILITY**

The extent of staffing accountability is described in this section, including the breadth and depth of the responsibility.

This section identifies the type and level of supervision and leadership responsibility vested in the position. It defines the breadth of the supervision given, including whether simple work direction is given or whether the responsibility extends to making employment decisions (e.g., hiring, firing, reviewing performance, terminations, pay changes, etc.). Also, the number and type of employees supervised should be identified.

Section A of the Attachment to the JAQ addresses supervisory responsibilities.

### **INTERPERSONAL CONTACTS**

This section focuses on the type, kind, and content of interactions with others both inside and outside the organization. It should specify what type of interactions occur (one-on-one, group, presentations, face-to-face, via telephone, via written correspondence, etc.), the complexity of interactions (simple information exchange, negotiation, giving/receiving instructions, problem-solving, etc.), typical content of interactions (i.e., whether confidential and/or sensitive information is discussed), and with whom the interactions occur. Also, the potential impact of the interactions needs to be addressed.

Section IV of the JAQ addresses interpersonal contacts. In addition, the essential functions in Section II should be examined to identify/verify the type and nature of interactions with others.

### **SPECIFIC JOB SKILLS**

This section is critical to a Job Descriptions meeting the needs for ADA compliance and any return to work arrangements. It lists specific mental and physical abilities required to perform the essential functions of the position. It also describes the tools or equipment used. In addition, any knowledge, skills, abilities, and/or mental or physical capabilities required by any other portion of the job description should be included. (For example, if communication requires presentations, then oral presentation skills, speaking ability, and the ability to develop presentations should be included here). Equal attention should be given to job skills that are required to successfully carry out the functions of the job, such as the operation of specific medical equipment. A sentence regarding the requirement to work in excess of eight hours per day and/or forty hours per week should also be included, if applicable.

Section V-A through C in the JAQ addresses job skills. Checklists for mental and physical requirements are provided to ease the task of listing skills. It is often easiest to group these skills based on the frequency with which they occur, e.g., listing all of the mental tasks that occur continuously, frequently, etc. These checklists are taken directly from the ADA text which should aid an organization in achieving compliance with those regulations.

### **EDUCATION/EXPERIENCE**

This section defines the specific educational and/or experience requirements of the position. It may also describe required or helpful skill areas, and required licenses or certifications.

The section should address the specific educational background and/or other credentials required to perform the job. Items that should be included are diplomas, degrees, certifications, and licenses. Be sure not to inflate the educational requirements. For example, do not state “Bachelor’s degree required,” unless it really is. There are actually very few jobs for which a degree at any level should be required. Making a degree a requirement is equivalent to saying that no one, regardless of the number of years’ experience or other educational efforts that have been made, could perform the tasks or duties of the job unless they had a specific degree. Positions such as attorneys, physicians, and engineers require a degree because individuals cannot meet the licensing requirements without one, but that type of situation applies to only a few types of positions. Requiring a degree when it really isn’t necessary has been found to be a prima facie case of both race and age discrimination. The rationale for this is that studies show that the younger a person is, the greater the likelihood that they will have a degree. Therefore, the requirement of a degree suggests that it discriminates against older workers. The same is true for race, in that studies show there is a greater likelihood of having a degree if the individual is Caucasian than if they are of a different racial profile.

While there is no intentional discrimination by stating a requirement of a specific educational level, it has been found to have an adverse impact on older and non-Caucasian individuals.

This section should also specifically identify the number of years and type of experience necessary to meet minimum job requirements. Finally, skills that are helpful, but not required, may also be included here.

Section VI of the JAQ covers education and experience.

### **JOB CONDITIONS**

This final section describes the working conditions under which the job duties are performed. It identifies the work environment, job demands, and any undesirable features of the position. Some of the areas to address include extensive travel, overtime, evening meetings, interruptions, extensive computer monitor work, exposure to hazardous materials, etc.

Information on this section is found in Section VII of the JAQ.

## WRITING JOB DESCRIPTIONS FROM JAQ'S

The process of writing job descriptions based on the information found in the Job Analysis Questionnaire is made easier by the structure of the JAQ and a thorough understanding of the three general guidelines outlined in the first section. The following describes how each section is written based on the JAQ.

The first step in writing the job description is to review the JAQ and ensure that all relevant information is included. Incomplete answers, skipped sections, and unreadable writing should be clarified. When writing the description, rely on the standardized language of the JAQ. It is perfectly acceptable to use the same language found in the answers to each question. In fact, doing so will ensure that the language between job descriptions is consistent. It is not necessary to include every written comment or response. Use the written comments to clarify ambiguities, or add to responses. The language in the questions and/or answers on the JAQ is usually sufficient to describe the position without relying on the written comments.

Begin by filling in the information at the top of the job description, including the position title, the department, to whom the position reports, and whether the position is eligible for overtime. Sample job descriptions are provided in the Appendix of this manual.

### 1. Job Title

In creating an appropriate job title for the position, asking the incumbent may be the best place to start. Often incumbents can quickly come up with a practical name for their position that neither understates nor over-inflates the level of the position within the organization's hierarchy. Another resource is the Dictionary of Occupational Titles available through the U.S. Department of Labor. Cute or catchy titles may be fun, but it is important to remember that the title conveys information to people, including the position incumbent. If the title is inflated it is easy for the individual in that job to make inappropriate comparison in the marketplace and arrive at a conclusion that he/she is underpaid. If the title is inflated, people interacting with that employee may think he/she has more authority or responsibility than he/she actually does and that can cause difficulties in the relationship when those expectations are not met.

### 2. General Position Summary

The General Position Summary is developed from the language found in Section I of the JAQ. Incumbents will often list their primary duties in this section. The writer's goal is to summarize these duties and develop a general statement that allows the reader to understand why the position exists. The summary sets the tone for the remainder of the job description. It is the capstone, or pinnacle, of the description. Each subsequent section of the job description supports the General Position

Summary. One of the best ways to think about a General Purpose statement is to think about what the incumbent might say when responding to the question, “So what do you do in your job?” Most everyone has a shorthand statement they make about what their job entails. This is a great place to start when thinking about what words should be used in this section.

### 3. Essential Functions/Major Responsibilities

This section describes the individual duties that are performed in fulfilling the position requirements and is developed from information found in Section II of the JAQ. Each essential function statement starts with an active verb and goes on to describe the work performed. The responses on the JAQ may tend to lack the specificity needed to develop detailed essential function statements. Having some knowledge of the job can be helpful to the writer, allowing him/her to apply that knowledge to fill in any blanks in the incumbent's description of the essential functions of the job. For example, an incumbent may list “Performs nursing duties.” While this gives the reader a flavor of the job, it fails to clearly identify what the incumbent actually does. Such a vague statement should be expanded to include the actual job duties or behaviors. For example:

*Performs a variety of nursing duties, including changing dressings, giving injections or meds, conducting routine medical assessments such as blood pressure, temperature, and respirations, arranging for tests and procedures conforming to doctors’ orders, charting changes in a patient’s condition, and working to ensure that patients’ needs are adequately met.*

This essential function statement clearly identifies the duties that may be part of a nursing position. In addition, this statement can be used later to define and develop the section on interpersonal contacts and specific job skills.

### 4. Secondary Functions

In reading the essential function statements in the JAQ, the job description writer will often find that duties are included that do not relate to the General Position Summary. Positions that cover other positions, or fill in during breaks will often contain essential function statements that are candidates for this section. The key here is to examine each essential function with respect to both the General Position Summary and to the three tests outlined in the definition of the essential functions section. For example, it may be that the HR Director is responsible for the organization’s employee events, but that would be a secondary function since it is unlikely that handling those events are the reason the organization has an HR Director.

### 5. Scope

Much of this section can be written directly from the language in Section III of the JAQ and, if applicable, from the Attachment to the JAQ. In short, the writer's goal is

to tie the language of each response into a single paragraph. By using the language from the JAQ, in many cases verbatim, the writer will ensure that job descriptions throughout the organization contain consistent language. This will help and enhance the processes of conducting job evaluations and developing performance appraisals. It will also increase the ability to compare positions.

It is important to note that the information to be included in this section is found throughout the JAQ. The use of authority, independent discretion and judgment, the extent to which the position has reasonability for financial expenditures, and the level of decisions typically made are all elements that would be addressed in this section. Finally, the writer must carefully examine the description of the impact of errors and write a short (usually one sentence) description about the potential consequences of errors in performing job duties.

#### 6. Supervisory Responsibility

This section can be written almost entirely from the information found in the Attachment to the JAQ. The writer should clearly define the level of supervisory responsibility, making sure to include the number and type of employees supervised. If the position has the responsibility to recommend actions regarding employees but does not make the final decision, then this should be clearly stated here.

#### 7. Interpersonal Contacts

Much of this section can be written directly from Section IV of the JAQ. It is important to clearly define with whom the internal and external contact occurs (e.g., customers, vendors, public, other agencies, regulators, etc.). Once again, knowledge of the position can help augment information provided by the incumbent. It is important to use words in this section that are particularly relevant to the employer. Some organizations would think of interactions with customers, while others would be more comfortable referring to them as clients. Sensitivity to the nuances of vocabulary can make a positive difference here.

#### 8. Specific Job Skills

This can be the most challenging section to develop because it relies on the writer's ability to examine the JAQ and develop a list of specific job skills and mental and physical requirements from Section V of the JAQ. One method of developing such a list is to examine each section of the job description written so far and list any job skills and mental or physical capabilities that would be required to perform those duties or functions. For example, the essential function statements for the nursing position described above might lead to the following list of job skills:

- Use thermometer
- Carry on complex interactions
- Provide information by telephone and in person



- Present complex medical information in a clear and understandable manner

Mental and physical requirements may include:

- Use of discretion
- Communicate effectively
- Make decisions within the scope of expected knowledge
- Solve problems
- Interact effectively with individuals who are upset or hostile
- Ability to read, write, speak, and understand English
- Sit for extended periods of time
- Ability to lift up to 200 pounds with the aid of another employee or mechanical equipment
- Use a computer

The physical and mental checklists included in the JAQ greatly simplify the process of describing physical and mental requirements. To further simplify the summarization of these lists, group requirements by the frequency with which they are utilized. For example, group all of the physical activities that occur continuously versus occasionally. This section might then read:

*Continuously sits; frequently stands, walks, bends, stoops; may lift and carry up to 25 pounds; reaches, talks, and hears. May occasionally use repetitive motions of the hands/wrists and/or feet.*

The same method can be used with the section on mental requirements. Depending on the level of detail desired, this section may also include the degree of difficulty and/or complexity (simple, moderate, complex) for each activity. For example, a typical section describing mental activities might read:

*Continuously conducts complex interpersonal interactions, makes moderately complex decisions, supervises others, analyzes and solves complex problems, and handles multiple tasks. Frequently uses teamwork skills, discretion, and mentors/trains new employees.*

Another example of how this might read for a less complex position might be:

*Frequently conducts simple interactions with others, analyzes and solves moderately complex problems with input from the supervisor, and may occasionally use collaboration skills.*

Much of this section requires that the individual filling out the JAQ, the supervisor who reviews the JAQ, and the person who writes the job description critically appraise the actual requirements of the job. While it is tempting to classify all activities as being complex and occurring continuously, it is far better to realistically portray the actual job duties.

## 9. Education/Experience

This section relies almost completely on the language in Section VI of the JAQ. It is important to understand that the goal is to identify possible ways in which an individual can develop and demonstrate the necessary knowledge base. This can be achieved through education and/or experience. Any listing of required academic degrees should *only* be included when the requirement can be justified and documented. In general, the statement can be written as follows:

*“Incumbents will typically possess a [fill in educational requirement here] specializing in [fill in major, if applicable], and \_\_\_ to \_\_\_ years of experience, or equivalent with a demonstrated mastery of the required skills.”*

Following this opening, summarize any written description of licenses or certificates required.

## 10. Job Conditions

This final section of the job description can be written directly from the checklist in Section VII of the JAQ. After verifying the accuracy of the checklist, simply list the items that are checked and add a brief description of the environment where the job occurs (e.g., office, in the field, etc.).

## **REVIEWING THE JOB DESCRIPTION AND ASSESSING THE CONTENTS**

When writing job descriptions from JAQ's, it is important to have more than one person check the content to ensure that both the JAQ and the job description adequately describe the actual position. If an incumbent initially completes the JAQ, a supervisor should review it prior to writing the job description. Afterward, both the supervisor and the incumbent should review the job description. This way, there are multiple opportunities to ensure that the final document is a true and accurate description of the position. Another key consideration is the use of the HR department if the organization has one. The individuals who staff this function should have the most complete and comprehensive knowledge about job descriptions and should be utilized to write them, or at least review them once they are written, to ensure consistency of information and format. Organizations that use the same format and the same depth of information in the job descriptions are far less likely to have compliance problems with these key documents.

Ensure that the essential function statements match and support the General Position Summary. A close review of the job scope section may prompt questions about the perceived level of authority and decision-making vested in the position. Also, carefully review the Specific Job Skills section, and examine each essential function statement and the other sections of the description to ensure that all relevant requirements are listed. Each of the job skills listed should include a description of how often it is used, and whether any qualifying descriptors would clarify the level of skill applied. (For example, how much time is spent sitting versus standing, and the complexity of interactions with others.)

Review the Education and Experience section to ensure required licenses and certifications are clearly identified, not exaggerated, and include possession of a valid driver license if driving is required.

By taking the time to carefully construct each job description, you will create a document that can easily be used for many important employee relations and human resources purposes.

Finally, it is important to have a formal schedule for reviewing all job descriptions at least once a year for content changes. Another approach is to review job descriptions as vacancies occur or at time of the performance review of the incumbent.

# APPENDIX

## **Glossary of Action Verbs**

<b>Administer</b>	Exercise and implement control over the performance of specific operations, approved plans, or established policies within the scope of limited and well-defined authority.
<b>Advise</b>	Give information or opinion pertinent to a probable course of action.
<b>Analyze</b>	Study the factors of a problem to determine a proper solution.
<b>Anticipate</b>	Foresee events, trends, consequences, or problems.
<b>Appraise</b>	Exercise expert judgment of the value or status of proposals or performance.
<b>Approve</b>	Authorize action; exercise final authority; act independently without further consultation.
<b>Arrange</b>	Make preparation for an event; put in proper order.
<b>Assemble</b>	Collect or gather together in a predetermined order; fit together the parts of.
<b>Assign</b>	Appoint subordinates to accomplish specific responsibilities.
<b>Assist</b>	Take active part or give support in performing a function.
<b>Audit</b>	Examine to verify accuracy or conformity with requirements.
<b>Authorize</b>	Give subordinates the power or right to act by virtue of having final or definite authority.
<b>Circulate</b>	Pass into the hands of readers.
<b>Collaborate</b>	Work or act jointly with others.
<b>Collect</b>	Gather or assemble into one body or place, usually for further study or examination.
<b>Compile</b>	Compose out of materials from other documents.
<b>Conduct</b>	Exercise leadership in a project or study.
<b>Consolidate</b>	Combine into a single whole.
<b>Consult</b>	Seek opinion or advice of another.
<b>Contribute</b>	Play a significant part in bringing about an end or result.
<b>Control</b>	Exercise restraining or governing influence over activities to accomplish planned results by 1) establishing standards; 2) measuring work in progress; 3) interpreting results; and 4) taking corrective action.
<b>Coordinate</b>	Combine (through balancing, timing, integrating) the effects of separate groups to accomplish a specific objective; can be exercised without line authority.
<b>Counsel</b>	Give advice and guidance to another.

<b>Delegate</b>	Entrust to another's care and management.
<b>Determine</b>	Obtain definite and firsthand knowledge of.
<b>Develop</b>	Advance programs, planning, or personnel capabilities to a higher stage.
<b>Direct</b>	Authoritatively define, regulate, or determine the activities of subordinate organizational units to achieve predetermined objectives.
<b>Distribute</b>	Apportion or deal out as in distributing literature or mail.
<b>Draft</b>	Write or compose papers or documents in rough, preliminary, or final form, usually for clearance and approval by others.
<b>Edit</b>	Revise and prepare, as for publication.
<b>Ensure</b>	Make certain of an outcome.
<b>Establish</b>	Put into effect or determine conclusively.
<b>Estimate</b>	Gauge the probable amount or value of.
<b>Evaluate</b>	Appraise; consider the value of.
<b>Execute</b>	Put into effect according to a plan (see <i>administer</i> ).
<b>Exercise</b>	Bring to bear or employ actively, as exercise authority or influence.
<b>Expedite</b>	Hasten the movement or progress of; remove obstacles; accelerate.
<b>Facilitate</b>	Make easy or less difficult (usually by doing something to advance the accomplishment of an act).
<b>Follow-up</b>	See that actions are carried out to the finish.
<b>Formulate</b>	Express in an exact or systematic form.
<b>Guide</b>	Show the way through the intermediate steps in a broad plan or course of action by advice or suggestion rather than by authoritative direction.
<b>Implement</b>	Carry out; perform acts essential to the execution of a plan or program.
<b>Inform</b>	Tell or make known; communicate knowledge to; acquaint.
<b>Initiate</b>	Start, begin, or introduce a program or action.
<b>Interpret</b>	Explain or clarify.
<b>Investigate</b>	Inquire into systematically.
<b>Issue</b>	Send out or distribute officially.
<b>Maintain</b>	Keep in a state of efficiency or validity.
<b>Manage</b>	Plan, organize, and control <u>dissimilar functions</u> to achieve coordinated objectives on leading and directing subordinates without giving detailed supervision (also see <i>superintend</i> and <i>supervise</i> ).
<b>Motivate</b>	Inspire and stimulate subordinates to maximize their efforts and productivity.

<b>Negotiate</b>	Reach agreement on specific proposals through discussion or communication with others of different viewpoints.
<b>Organize</b>	Set up plans and procedures for achieving objectives.
<b>Participate</b>	Take part in and share responsibility with others for action, but without individual authority to take action.
<b>Perform</b>	Accomplish to completion.
<b>Plan</b>	Devise or determine a course of action to achieve a desired result.
<b>Prepare</b>	Make ready for a specific purpose; put into written form.
<b>Present</b>	Offer for consideration.
<b>Process</b>	Handle in accordance with a prescribed procedure, as in work or requisitions.
<b>Promote</b>	Offer for consideration in a manner intended to attract favorable attention and influence acceptance or support.
<b>Propose</b>	Offer for acceptance or adoption.
<b>Provide</b>	Furnish necessary information or services.
<b>Propose</b>	Offer for consideration or adoption; form or declare a plan or intention.
<b>Provide</b>	Supply for use; furnish; take precautionary measures in view of a possible need.
<b>Recommend</b>	Offer for acceptance and support a course of action to persons responsible for approval or authorization.
<b>Refer</b>	Send or direct to a person or place for action, approval, etc.
<b>Release</b>	Permit the publication or dissemination of on a specified date but not before.
<b>Represent</b>	Take the place of.
<b>Review</b>	Go over or examine deliberately or critically (usually with a view to approval or dissent).
<b>Revise</b>	Make a new, improved, or up-to-date version of.
<b>Schedule</b>	Plan a timetable; get specific times for.
<b>Secure</b>	Get possession of; obtain.
<b>Select</b>	Take preference or choice from among others; pick out.
<b>Serve</b>	Actively carry out duties within the framework of a specialized activity, such as a committee.
<b>Submit</b>	Present for decision, information, or judgment of others.
<b>Superintend</b>	Plan, organize, and control a function to achieve an objective by leading and directing subordinates without giving detailed supervision (also see <i>manage</i> and <i>supervise</i> ).

<b>Supervise</b>	Instruct subordinates in details of the work they perform (either directly or by enforcement of well-established rules), allot work, observe performance in detail and work with subordinates to improve performance.
<b>Survey</b>	Determine and delineate the form, extent, position, etc. of a situation (usually in connection with gathering information).
<b>Train</b>	Increase skill or knowledge by capable instruction. Usually in relation to predetermined standard.
<b>Verify</b>	Prove to be true or accurate; confirm or substantiate; check exactness.

### **Related Verbs - Differences**

<b>Assure</b>	Give confidence to someone
<b>Ensure</b>	Make certain
<b>Insure</b>	Protect against loss
<b>Affect</b>	Influence. Implies the producing of an effect (cause) strong enough to evoke a reaction.
<b>Effect</b>	Cause. Applied to that which is directly produced by action, process, or agent.

### **Words to Avoid (nebulous, non-action verbs)**

- Know
- Comprehend
- Be familiar with
- Appreciate
- Understand
- Believe
- Grasp the significance of
- Enjoy



ORGANIZATION NAME

JOB ANALYSIS QUESTIONNAIRE

Employee Name: \_\_\_\_\_

Current Job Title: \_\_\_\_\_

How Long in This Position? \_\_\_\_\_ Eligible for overtime? \_\_\_\_\_

Supervisor's Title: \_\_\_\_\_

Department \_\_\_\_\_

SECTION I: GENERAL SUMMARY

In two or three sentences, describe the purpose of your position and summarize your major responsibilities and/or the primary function of your position:

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SECTION II (continued)

2. Describe any secondary or other responsibilities that this position performs which are not essential to the primary role of this position.

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3. Describe any special or additional responsibilities that this position has during peak seasonal activity.

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SECTION III: JOB SCOPE

- A. Describe the nature of recurring work vs. diverse, new work that you perform:

- Routine work situations.
- Regular and recurring work situations.
- Recurring work situations with occasional variations from the norm.
- Frequent new and varied work situations.
- Wide diversity of work situations.

- B. Describe the level of complexity related to your essential functions/major responsibilities:

- Job involves a low level of complexity.
- Job involves a moderate degree of complexity.
- Job involves a high degree of complexity.

What about your job makes it complex? \_\_\_\_\_

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- C. To what degree do formal policies and procedures exist which govern your work?
- Operate from specific and definite directions and instructions.
  - Operate from established and well known procedures.
  - Determine own practices and procedures. Contribute to the development of new concepts.
  - Responsible for developing policies and objectives.
- D. Describe the degree to which your job is performed independently, without direct supervision:
- Performs duties under close supervision.
  - Operate under moderately high level of supervision.
  - Receive moderate supervision.
  - Operate independently-minimal supervision.
  - Perform duties with little direction given.

#### SECTION IV: COMMUNICATIONS/CUSTOMER CONTACT

- A. Indicate the nature of your communications inside and outside (Organization Name) in terms of frequency and complexity:
- Contacts are normally made with others within (Organization Name).
  - Contacts are normally made with others outside (Organization Name).
  - Contacts are normally made with others both inside and outside (Organization Name).
- B. Describe your most frequent communications within (Organization Name), including type and positions:
- Contacts are usually with own department staff and own supervisor.
  - Contacts are usually made with other departments or locations.
- C. To what extent are you entrusted with and/or required to communicate confidential or sensitive information?
- Contacts are seldom about confidential/sensitive matters.
  - Contacts contain some discussion about confidential/sensitive matters.
  - Contacts frequently contain confidential/sensitive information necessitating discretion at all times.
- D. What percentage of your contacts are by telephone \_\_\_\_ % , face to face \_\_\_\_% and email \_\_\_\_%:

- E. What percentage of your contacts are with customers \_\_\_% and with non-customers \_\_\_%

SECTION V: SPECIFIC JOB SKILLS

- A. List job skills related to the areas described above (e.g. specific manufacturing or technical skills, ability to use equipment/tools/machinery, interpersonal skills, decision making, judgment, supervisory skills, communication skills, etc.)

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- B. Mental Activities:

1. Indicate which of the following mental activities are required by the work. Use the following code to indicate how often you use, or how much of your work involves the use of, each mental activity: N = Never (0%), R = Rarely (0-20%), O = Occasionally (21-50%), F = Frequently (51-80%), and C = Continuously (81+%).

- |  |   |
|--|---|
| <input type="checkbox"/> Decision Making   | <input type="checkbox"/> Use of Discretion      |
| <input type="checkbox"/> Interpersonal Skills  | <input type="checkbox"/> Presentations/Teaching |
| <input type="checkbox"/> Teamwork  | <input type="checkbox"/> Problem Analysis       |
| <input type="checkbox"/> Creativity  | <input type="checkbox"/> Negotiation            |
| <input type="checkbox"/> Customer Service  | <input type="checkbox"/> Selling                |
| <input type="checkbox"/> Mentoring   | <input type="checkbox"/> Training/Supervising   |
| <input type="checkbox"/> Read English  | <input type="checkbox"/> Write English          |
| <input type="checkbox"/> Speak English   | <input type="checkbox"/> Understand English     |
| <input type="checkbox"/> Perform basic Math (add, subtract, multiply and divide).  |   |
| <input type="checkbox"/> Perform advanced Math (analysis, statistics, significant data or number manipulation).          |   |
| <input type="checkbox"/> Perform basic programming (database setup, setting system defaults, some software modification) |   |
| <input type="checkbox"/> Perform advanced programming (software development and/or modification, and system development) |   |
| <input type="checkbox"/> Independent Judgment and/or Independent Action  |   |

2. Describe any other mental activities required: \_\_\_\_\_

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C. Physical Activities:

1. Indicate which of the following physical activities are required by the work. Use the following code to indicate how often you use, or how much of your work involves the use of, each physical activity: N = Never (0%), R = Rarely (0-20%), O = Occasionally (21-50%), F = Frequently (51-80%), and C = Continuously (81+%).

- |   |  |
|---|--|
| <input type="checkbox"/> Standing                           | <input type="checkbox"/> Sitting           |
| <input type="checkbox"/> Walking                            | <input type="checkbox"/> Bending           |
| <input type="checkbox"/> Stooping                           | <input type="checkbox"/> Kneeling          |
| <input type="checkbox"/> Crawling                           | <input type="checkbox"/> Climbing          |
| <input type="checkbox"/> Fingering                          | <input type="checkbox"/> Grasping          |
| <input type="checkbox"/> Talking                            | <input type="checkbox"/> Listening/Hearing |
| <input type="checkbox"/> Reaching                           | <input type="checkbox"/> Handling          |
| <input type="checkbox"/> Feeling                            |  |
| <input type="checkbox"/> Repetitive motions of hands/wrists |  |
| <input type="checkbox"/> Repetitive motions of feet         |  |

SECTION VI: EDUCATION/EXPERIENCE

A. Formal Education/Training:

1. Which formal education level is required to perform your job? (**DO NOT indicate your education level, but rather the minimum level required to perform the job.**):

- No formal education required.  
 High school education or equivalent.  
 Some higher education or vocational training specializing in \_\_\_\_\_  
 Associate degree or equivalent specializing in \_\_\_\_\_  
 Bachelor degree or equivalent specializing in \_\_\_\_\_  
 Certification - explain: \_\_\_\_\_
- 

B. Experience:

1. Please indicate the amount and type of work experience that is required to do your job (**again, NOT your personal experience**):

Identify type of experience required.

- No specific experience is required.

- 1-6 months \_\_\_\_\_
- 6-12 months \_\_\_\_\_
- 1-2 years \_\_\_\_\_
- 2-4 years \_\_\_\_\_
- 5-8 years \_\_\_\_\_
- More than 8 years \_\_\_\_\_

2. Describe the extent of knowledge about other (Organization Name) functions that are required to perform your job. Include amount of experience needed, if applicable (for example, Customer Service needs to know about order and distribution processes to best assist customer):

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**SECTION VII:      JOB CONDITIONS**

A. Describe the job conditions which apply to your job. Include any hazardous tasks or environments:

- |   |  |
|---|--|
| <input type="checkbox"/> Extensive travel       | <input type="checkbox"/> Heavy lifting           |
| <input type="checkbox"/> Substantial overtime   | <input type="checkbox"/> Constant standing       |
| <input type="checkbox"/> Evening meetings       | <input type="checkbox"/> Extensive close work    |
| <input type="checkbox"/> On-call status         | <input type="checkbox"/> Extensive computer work |
| <input type="checkbox"/> Other (describe) _____ |  |

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SECTION VIII:      OTHER RELATED INFORMATION

A.    Do you spend eight or more hours per week performing clerical duties (entering data, word processing, keyboarding, typing, filing, etc.)?    Yes ( )    No ( )

B.    Indicate the approximate dollar value of (Organization Name) resources (e.g., inventory, equipment, cash, facilities, etc.) under your immediate control, or which you directly affect:

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C.    Describe the records maintained by you in terms of their volume, sensitivity, and confidentiality:

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\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Date



## Attachment to Job Analysis Questionnaire

### Supervisor's Comments

Supervisors are requested to review the information provided by the employee on the job analysis questionnaire. Supervisors should make any comments concerning accuracy, thoroughness, etc. in the space below. Identify whether this position is accurately described, or over or understated. Explain difference between this description and the position's responsibilities as you see them. Please do NOT change any information the employee entered. If the differences of opinion are significant, please talk with the employee prior to turning this JAQ in.

Supervisors are requested to sign this form as a means of verifying their review of the information submitted by the job incumbent. Completed forms should be returned to:

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Supervisor's Signature

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Date

**Attachment to Job Analysis Questionnaire  
For Managerial, Supervisory, or Professional Staff**

**A. Staffing Accountability**

Describe any supervisory responsibilities that you have:

- Job is not supervisory in nature.
  - Job is supervisory to the extent that daily work direction is provided to personnel in subordinate classifications.
  - Job includes full supervisory responsibilities such as:
    1. Providing daily work direction responsibilities.
    2. Approval of absences or overtime.
    3. Recommendations and/or approval regarding hiring, terminations, pay changes or job changes.
  - Other (describe): \_\_\_\_\_
- 

If job is supervisory, indicate how many employees you supervise both directly and indirectly: \_\_\_\_\_

Identify job titles of staff you supervise:

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**B. Scope of Decision-Making Authority**

Describe the scope of decision-making authority exercised in your job:

- Decisions are made within prescribed operating guidelines.
  - Decisions are made within (Organization Name) policy constraints.
  - Decisions are made within broad interpretation of applicable laws, governmental guidelines.
  - Other (describe): \_\_\_\_\_
-

Describe typical decisions made: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

C. Scope of Budgetary Accountability

1. Describe the scope of budgetary accountability encountered in your job:

- Not accountable for budget preparation or compliance.
- Make budgetary recommendations.
- Partial budgetary preparation/compliance accountability.
- Total budgetary preparation/compliance accountability.
- Other (describe): \_\_\_\_\_

\_\_\_\_\_

2. Estimate the annual level of your operating budget?

- |  |   |
|--|---|
| <input type="checkbox"/> No operating budget | <input type="checkbox"/> \$100,000-\$250,000    |
| <input type="checkbox"/> Under \$50,000      | <input type="checkbox"/> \$250,000-500,000      |
| <input type="checkbox"/> \$50,000-100,000    | <input type="checkbox"/> Greater than \$500,000 |

D. Scope of Capital Asset/Equipment Control Accountability

1. Describe the scope of capital asset control accountability in your job:

- Not accountable for control of capital assets.
- Partially accountable for control of capital assets.
- Totally accountable for control of capital assets.

2. Estimate the current value of capital assets/equipment for which you have control accountability:

- |   |   |
|---|---|
| <input type="checkbox"/> Under \$25,000     | <input type="checkbox"/> \$100,000-\$250,000    |
| <input type="checkbox"/> \$25,000-50,000    | <input type="checkbox"/> \$250,000-500,000      |
| <input type="checkbox"/> \$50,000-\$100,000 | <input type="checkbox"/> Greater than \$500,000 |

E. Scope of long-range Planning Involvement

Describe the scope of long-range planning involvement encountered in your job:

1. Operational (Internal):

- Not involved in long-range operational planning.
- Informally makes recommendations concerning long-range operational planning.
- Partially accountable for long-range operational planning.
- Totally accountable for long-range operational planning.

2. Strategic (External):

- Not involved in long-range strategic planning.
- Informally makes recommendations concerning long-range strategic planning.
- Partially accountable for long-range strategic planning.
- Totally accountable for long-range strategic planning.

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Employee's Signature

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Date

# ADA – Mental and Physical Activity Requirements

## Mental Activity Requirements

Position Being Assessed: \_\_\_\_\_

Form Completed By: \_\_\_\_\_

Title: \_\_\_\_\_ Date Form Completed: \_\_\_\_\_

Check the applicable mental demands listed. Consider the level of complexity as well as the frequency of the demand of how often each is done during an average work day (if never, leave box blank).

How often (frequently) does the demand occur: Regularly (R) up to 33%, Frequently (F) from 33-66%, or Continuously (C) 66%+.

### Interpersonal Interactions - Frequency \_\_\_\_\_

- \_\_\_\_\_ Simple - such as basic information exchange, etc.
- \_\_\_\_\_ Moderate - such as providing work direction or instructions (usually one-on-one), etc.
- \_\_\_\_\_ Complex - such as coaching, negotiating, selling, making group presentations, etc.

### Supervision - Frequency \_\_\_\_\_

- \_\_\_\_\_ Simple - provides basic work direction and support to small groups (up to 15) of usually skilled and semi-skilled employees.
- \_\_\_\_\_ Moderate - has limited supervisory responsibility for small to medium groups (up to 15) of usually skilled and semi-skilled employees.
- \_\_\_\_\_ Complex - has full supervisory responsibility for medium to large groups (16 or more) of usually skilled and highly skilled employees.

### Problem-Solving - Frequency \_\_\_\_\_

- \_\_\_\_\_ Simple - under general supervision, solves problems for self. Complex problems are referred to supervisor.
- \_\_\_\_\_ Moderate - under limited supervision, anticipates and solves problems for self, and other lower level/same level employees within and outside own department.
- \_\_\_\_\_ Complex - with little/no supervision or direction, anticipates and solves problems for self and others at all levels of the organization.

### Analyzing/Evaluation - Frequency \_\_\_\_\_

- \_\_\_\_\_ Simple - under direction, examines basic information and/or situations and prepares summaries or draws conclusions for evaluation by others.
- \_\_\_\_\_ Moderate - under general direction, examines moderately complex information and/or situations and prepares summary, including recommendations for review by others.
- \_\_\_\_\_ Complex - independently examines complex information and/or situations, evaluates potential impact, options, and makes recommendations.

### Decision-Making - Frequency \_\_\_\_\_

- \_\_\_\_\_ Simple - majority of decisions are made utilizing established policies and procedures, and concern self and/or work responsibilities only.
- \_\_\_\_\_ Moderate - most decisions are made within company policy constraints, and some latitude exists. Decisions may impact others or the organization.
- \_\_\_\_\_ Complex - decisions are guided by precedent and interpretation of applicable laws, etc. Decisions have a significant impact on others and the organization.

ADA Mental and Physical Activity Requirements (continued)

**Equipment Operation** - Frequency \_\_\_\_\_

- \_\_\_\_\_ Simple - operates simple equipment such as telephone, copy machine, simple hand tools, facsimile machine.
- \_\_\_\_\_ Moderate - operates somewhat complex equipment, often requiring education/training, including computer hardware/software, switchboard, pallet jack/forklift.
- \_\_\_\_\_ Complex - operates complex equipment/machinery requiring extensive training and in-depth understanding of various applications, etc.

**Discretion/Confidentiality** - Frequency \_\_\_\_\_

- \_\_\_\_\_ Simple - work responsibilities seldom concern confidential and/or sensitive information.
- \_\_\_\_\_ Moderate - work responsibilities occasionally concern confidential and/or sensitive information requiring the use of discretion.
- \_\_\_\_\_ Complex - work responsibilities frequently concern confidential and/or sensitive information requiring the use of discretion at all times.

**Math Skills** - Frequency \_\_\_\_\_

- \_\_\_\_\_ Simple - ability to perform basic math computations including addition, subtraction, multiplication, and division.
- \_\_\_\_\_ Moderate - ability to calculate percentages, work with fractional numbers, and perform simple algebra.
- \_\_\_\_\_ Complex - ability to perform extrapolation and analysis, using advanced math calculations.

**Teamwork** - Frequency \_\_\_\_\_

- \_\_\_\_\_ Simple - majority of work is performed independently, seldom requiring the use of teamwork or cooperation.
- \_\_\_\_\_ Moderate - teamwork and cooperation are required approximately 50% of the time in order to successfully complete job duties.
- \_\_\_\_\_ Complex - teamwork and cooperation are essential to the successful completion of own and others job duties.

**Read/Write/Speak English** - Frequency \_\_\_\_\_

- \_\_\_\_\_ Simple - ability to understand and follow basic verbal instructions, and respond understandably.
- \_\_\_\_\_ Moderate - ability to understand and follow somewhat complex verbal and written instructions. Ability to communicate effectively with others both verbally and in writing.
- \_\_\_\_\_ Complex - ability to perform complex verbal and written communications face-to-face and in group settings.

**Creativity** - Frequency \_\_\_\_\_

- \_\_\_\_\_ Simple - job duties are regular and recurring and seldom require conceptualizing, planning or implementing.
- \_\_\_\_\_ Moderate - job duties are somewhat varied, occasionally requiring conceptualizing, planning and implementing.
- \_\_\_\_\_ Complex - job duties are widely diverse, and frequently require conceptualizing, planning and implementing.

**Task Handling** - Frequency \_\_\_\_\_

- \_\_\_\_\_ Simple - job duties are repetitive and recurring and focus on a single task, seldom requiring attention to other areas/duties.
- \_\_\_\_\_ Moderate - job duties tend to be recurring, but occasionally require attention to and/or coordination of concurrent job duties.
- \_\_\_\_\_ Complex - job duties are widely varied, and frequently require attention to and/or coordination of concurrent job duties.

### Physical Activity Requirements

Position Being Assessed: \_\_\_\_\_ Form Completed By: \_\_\_\_\_

Title: \_\_\_\_\_ Date Form Completed: \_\_\_\_\_

Check the applicable physical demands listed. Think of the frequency of the demands in terms of how often each is done in a normal 8 hour work day.

PHYSICAL ACTIVITY DEMANDS	NEVER 0%	REGULARLY UP TO 33%	FREQUENTLY 33 TO 66%	CONTINUOUSLY 66 TO 100%
<b>Sitting</b>				
<b>Standing</b>				
<b>Walking</b>				
<b>Bending</b>				
<b>Stooping</b>				
<b>Kneeling</b>				
<b>Crawling</b>				
<b>Climbing</b>				
<b>Pushing</b>				
<b>Pulling</b>				
<b>Lifting</b>				
<b>Fingering</b>				
<b>Grasping</b>				
<b>Talking</b>				
<b>Hearing</b>				
<b>Repetitive Motions Using Hands/Wrists</b>				
<b>Repetitive Motions Using Feet</b>				
<b>Reaching</b>				
<b>Handling</b>				
<b>Feeling</b>				
<b>Other (please specify)</b>				

ADA Mental and Physical Activity Requirements (continued)

<b>LIFTING OR CARRYING DEMANDS</b>	<b>NEVER 0%</b>	<b>REGULARLY UP TO 33%</b>	<b>FREQUENTLY 33 TO 66%</b>	<b>CONTINUOUSLY 66 TO 100%</b>
<b>Up to 10 lbs.</b>				
<b>11 to 20 lbs.</b>				
<b>21 to 50 lbs.</b>				
<b>51 to 75 lbs.</b>				
<b>76 to 100 lbs.</b>				
<b>Over 100 lbs.</b>				



## Job Title Definitions

**ADMINISTRATIVE ASSISTANT** (Non-Exempt) – These positions perform general clerical in a broad category of job duties. These positions are found in almost all departments under various titles. They do not provide lead duties but support either managers or department heads in support roles. They may carry the designations of I, II, or III depending upon the scope of job duties and their internal placement within an organization.

**EXECUTIVE ASSISTANT** (Non-Exempt) – These positions serve as support assistant to an executive or department head providing secretarial type services to the reporting executive. In addition to secretarial duties they often provide a broad range of executive services such as scheduling, handling appointments, etc. They may carry the designations of I, II, or III depending upon the scope of job duties and the level of the executive they report to.

**SPECIALIST** (Non-Exempt) – These positions normally encompass jobs that devote themselves to a specific function, skill area, or branch of learning and do not have supervisory or operating budget responsibilities. However, individuals in specialist categories may provide “lead” direction to employees in subordinate job classification.

**COORDINATOR** (Either exempt or non-exempt) – These positions are normally responsible for bringing various events into a common action in a smooth concerted way. These positions are typically staffed by individual contributors who do not have responsibility for subordinate personnel or operating budgets.

**ADMINISTRATOR** (Either exempt or non-exempt) – These positions are normally responsible for managing or supervising the execution, conduct or use of a function or functional area. These positions are typically staffed by individual contributors who do not have responsibility for subordinate personnel or operating budgets.

**SUPERVISOR** (Exempt) – These positions are the first level of management (below the level of Manager). This position normally includes only personnel responsible for directing the work of subordinate level employees. These positions are normally staffed by individuals responsible for recommending hiring, firing, and disciplinary and employee performance evaluation actions, but not operating budgets.

**MANAGER** (Exempt) – These positions are the second level of management above Supervisor and below Director. They generally report to a Director. These positions may or may not have subordinate level personnel reporting to them. These positions are normally staffed by individuals responsible for exercising executive, administrative, or supervisory direction over assignments, projects, or people and managing the attendant operating budgets.

**DIRECTOR** (Exempt) – These positions are the third level of management above Managers and below Vice Presidents. They generally report to a Vice President. Directors are responsible for one or more programs and/or one or more departmental functions. Director level positions supervise subordinate level positions and are responsible for operating budgets.

**ASSOCIATE DIRECTOR** (Exempt) - These positions often serve as an assistant to a Director and have broad or specific job responsibilities within a division of the organization. They often serve as second in command, or have responsibilities for a major function of the division. They may serve as the acting Director on the absence of the Director.

**VICE PRESIDENT** (Exempt) - These positions are the top level of management below the President. Vice Presidents are normally responsible for several programs, functional areas, and/or departments. Vice Presidents are members of the President's Executive Staff and assist in the development of company business policy and strategy. Vice President Positions supervise subordinate level positions and are responsible for one or more operating budgets.

**DEAN** (Exempt) – These are academic positions that have responsibilities for an academic division of the school and report to the Vice President in charge of the school. There may be several Deans reporting to a Vice President depending on the size and complexity of the operation. These positions at times are titled Directors to maintain consistency throughout the organization.

**ASSOCIATE DEAN** (Exempt) – These positions report to a Dean and usually head up an academic activity or department. They may have other staff members reporting to them and have responsibilities for the development of programs and/ or activities of the academic unit. These positions at times are titled Assistant Directors to maintain consistency throughout the organization.

## Sample Job Description Format

Title \_\_\_\_\_

Dept. \_\_\_\_\_

Exempt/Nonexempt \_\_\_\_\_

Reports to \_\_\_\_\_

Pay Grade \_\_\_\_\_

Effective Date \_\_\_\_\_

New position

Position change

The following information is designed to outline the functions and position requirements of this job. It does not identify all tasks that may be expected, nor address the performance standards that must be maintained.

### **General Position Summary:**

(2-3 sentences regarding role and responsibilities of position)

### **Essential Functions/Major Duties:**

(Not intended to be a task list, rather an identification of assigned work, and job responsibilities. Each statement should begin with active verb, and clearly identify whether work is done on own, or in conjunction with others.)

### **Secondary Functions:**

(These are items and tasks that the position performs, but they are not central to the reason for the job. They might be tasks that anyone could perform, but are currently assigned to this position. As an example, if it were an HR position, it might have language here indicating that it handles the organization's picnic, but that is not the reason that an HR job is created.)

### **Job Scope:**

(This section addresses such items as whether job operates within established parameters or is responsible for development and/or decisions regarding new policy or guidelines. It outlines scope of position relative to staff accountability, decision-making authority, creativity/innovation, budgetary accountability, management of capital assets, and responsibility for planning. It addresses consequences of error.)

**Supervisory Responsibility:**

(This section identifies the type, number, and skill level of employees supervised. It also states level of supervision offered.)

**Interpersonal Contacts:**

(This section specifies what type of interactions occur, how complex the interactions are, and with whom they occur. The delineation of inside and outside contacts, frequency, and scope should be identified.)

**Specific Job Skills:**

(This section identifies minimum skills necessary to perform essential job functions. Equal attention should be given to technical, managerial, and professional skills. Physical capabilities needed to perform work must be identified.)

**Education and/or Experience:**

(This section identifies specific educational credentials (if any) including certification, degree, and licensure. It also specifies the number of years and type of previous experience necessary to meet minimum requirements.)

**Job Conditions:**

(This section identifies the work environment, job demands, and any undesirable features of position. Such things as temperature, weather, chemicals, machinery, space, travel, pressure, substantial overtime, work schedule, etc., are usually identified here.)

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First Level Supervisory Approval

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Second Level Approval

(Sample)

## Job Description

Title Office Clerk

Dept. \_\_\_\_\_

Exempt/Nonexempt Non-Exempt

Reports to \_\_\_\_\_

Pay Grade \_\_\_\_\_

Effective Date \_\_\_\_\_

New position

Position change

The following information is designed to outline the functions and position requirements of this job. It does not identify all tasks that may be expected, nor address the performance standards that must be maintained.

### General Position Summary:

Assist the Office Manager in duties to help ensure the accurate and efficient operation of the office.

### Essential Functions/Major Responsibilities:

- Answer incoming phone calls in a courteous and professional manner. Transfer and relay messages to office staff.
- Receive and distribute all incoming faxes in a timely manner, including notifying staff when faxes arrive and placing faxes in correct mail boxes.
- Prepare and type various documents on a regularly scheduled basis or as requested. May include letters to clients and customers, inter-office memos, reports, and employee phone lists.
- Maintain office supply inventory. Prepare office supply purchase orders for approval when supplies are needed and distribute special orders of supplies to requesting staff members.

### Secondary Functions:

- Perform other related duties as assigned.

### Job Scope:

Job is fairly routine. Incumbent follows established practices and procedures. Duties are performed with specific directions given and work is checked or verified visually on a frequent basis. Decisions are made within specific operational instructions and

departmental guidelines. Errors in judgment could affect the smooth and efficient operation of the office.

**Supervisory Responsibility:**

Job has no supervisory responsibility.

**Interpersonal Contacts:**

Contacts are made with others both inside and outside the organization. Internal contacts frequently include the Office Manager and all office personnel. External contacts may include customers and clients. Interactions tend to focus on information exchange, receiving direction, or receiving training. Contacts never include sensitive or confidential information. Incumbent occasionally initiates contacts on his/her own with 60% being by phone and the remainder via face-to-face interaction.

**Specific Job Skills:**

- Possess knowledge of general office policies and administrative procedures and practices.
- Good organizational skills.
- Ability to read, write, speak, and understand English.
- Physical ability to operate telephone, computer hardware/software including keyboard, and 10-key, to type at a minimum of 40 wpm, to sit for extended periods of time, and occasionally to lift/carry up to 20 pounds.

**Education and/or Experience:**

- High school education or equivalent required.
- Six months previous clerical experience required.
- Some higher education in office practices preferred.

**Job Conditions:**

- Normal office working conditions.
- Job may require hours that exceed 8 hours per day and/or 40 hours per week during peak periods.
- Regular exposure to computer CRT.

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First Level Supervisory Approval

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Second Level Approval

(Sample)  
**Job Description**

Title Route Driver  
Dept. \_\_\_\_\_

Exempt/Nonexempt Non-Exempt Reports to \_\_\_\_\_

Pay Grade \_\_\_\_\_ Effective Date \_\_\_\_\_

New position

Position change

This job description in no way implies that these are the only duties to be performed by the incumbent. At all times, employees will be required to follow any instructions and to perform any duties within this or a lower job level upon request of the supervisor. At times employees may also be required to perform higher level duties.

**General Position Summary:**

Responsible for the timely pickup and delivery of mail on a scheduled basis while ensuring special requirements are met as they occur.

**Essential Functions/Major Responsibilities:**

- Drive vehicle to collect and deliver materials in order to satisfy customer requests.
- Reaffirm good customer relations while on deliveries.
- Maintain and service vehicles on a pre-assigned schedule and/or as needed.
- Coordinate collection and delivery schedules to maximize effectiveness of time and vehicle usage.
- Perform special requests such as deliver materials to specific locations at the site.

**Secondary Functions:**

- Sort mail.
- Coordinate delivery of mail to the Post Office in order to take advantage of special rates.
- Provide input on ways the organization can create integrated employment opportunities for people with disabilities.

**Job Scope:**

Performs duties independently with minimal supervision, operating from specific and definite directions and instructions. Decisions are of a routine nature made within prescribed operating guidelines, policies, and procedures. Mistakes/errors may result in

work stoppage, loss of business, poor customer relations, and/or damage to product, all of which can have negative financial implications for the organization.

**Supervisory Responsibility:**

This position is not supervisory in nature.

**Interpersonal Contacts:**

Has both internal and external contacts. The most common internal contacts are with own department staff and own supervisor. The most frequent external contacts are with customers. Both types of interactions involve information exchange and problem solving.

Both types of contacts are as a result of regular, on-going duties. 10% of the contacts are over the phone and 90% are face to face. At least 30% of all contacts are with external customers while 70% are non-customers or internal customers.

**Specific Job Skills:**

- Excellent driving skills required.
- Good interpersonal, communication, customer service, and time management skills essential.
- Ability to read, write and understand English required.
- Must possess a valid driver’s license, acceptable driving record, and proof of current vehicle insurance.
- Physical ability to engage in repetitive motions of feet, to hear, to see, to move goods for customers, to bend, to twist, and to climb stairs required.
- Physical ability to push up to 200 pounds, lift up to 100 pounds, and carry up to 80 pounds regularly throughout a normal workday required.

**Education and/or Experience:**

A minimum of 6-12 months experience/training in delivery, driving, or similar function is required. A high school education or equivalent is required.

**Job Conditions:**

Working conditions include working alone, shift work, extensive driving, heavy equipment operation, working outside in varying weather conditions, frequent interruptions and some evening meetings. The incumbent may be required to work in an environment where there are fumes, building temperature fluctuations, noise, chemicals, poor ventilation, dirt, dust, and chemicals.

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First Level Supervisory Approval

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Second Level Approval



(Sample)

## Job Description

Title Mail Services Manager

Dept. Mail Services

Exempt/Nonexempt Exempt

Reports to Dir. Operations & Marketing

Pay Grade \_\_\_\_\_

Effective Date \_\_\_\_\_

New position

Position change

The following information is designed to outline the functions and position requirements of this job. It does **not** identify all tasks that may be expected, nor address the performance standards that must be maintained.

### General Position Summary:

Responsible to oversee and manage all Mail Services operations and the profitability of the Mail Services Department.

### Essential Functions/Major Responsibilities:

- Ensure the profitability of Mail Services operations for the Company.
- Manage existing customer relations by ensuring good customer service is provided to all customers.
- Encourage customer retention by determining customer needs and offering or modifying services accordingly.
- Develop and coordinate work flows and processes of department to ensure that the department provides integrated employment opportunities for people with disabilities.
- Supervise all personnel within Mail Services.
- Oversee all production in Mail Services.
- Act as liaison between Company and Postal Service.
- Prepare operating budget for department.
- Meet department budget objectives, especially for labor and transportation.
- Manage the department capital assets in an efficient and cost-effective manner.

### Secondary Functions:

- Provide safety and emergency training to department employees.
- Remain knowledgeable in USPS regulations.

- Provide back-up support/coverage to all positions within Mail Services as needed including making delivery and receiving runs as required.
- Ensure all equipment is in serviceable condition and meet USPS standards.

**Job Scope:**

Performs duties with little direction given, operating from established directions and instructions. Decisions are made within general company policy constraints but occasionally require independent decision making.

Responsible for budget preparation for the Mail Services Department and compliance accountability for an annual operating budget of \$800,000. Accountable for the control of capital assets worth \$1,500,000. Partially accountable for the long range operational planning for the organization and may be asked to provide input for the organization's long range strategic planning process.

Mistakes/errors might result in a loss of employee morale and/or satisfaction in the Mail Services Department, loss of customer satisfaction resulting in loss of customers or poor customer relations, the under utilization or abuse of capital assets, and the financial impact of increased expenses when budget objectives aren't met.

**Supervisory Responsibility:**

Full supervisory responsibility for all the department's clerical, technical, and service personnel. This presently includes a total of 15 employees of which 9 are year round, 6 are seasonal, 11 are full time and 4 are part time. This responsibility includes employee evaluation, employee counseling and/or discipline, approving any absences or overtime, and making any recommendations for hiring, terminations, pay changes, job changes, and training.

**Interpersonal Contacts:**

Has regular contact with others both inside and outside the organization. The most common internal contacts are with own department staff and own supervisor. The most frequent external contacts are with customers and business associations. Internal and external interactions involve information exchange, problem solving, negotiation, and selling.

All contacts usually made at the employee's own initiative with 50% of the contacts being over the phone and 50% face to face. At least 40% of all contacts are with external customers while 60% are not. Internal contacts frequently contain some discussion about confidential/sensitive matters.

**Specific Job Skills:**

- Excellent supervision/managerial skills required.
- Excellent communication skills (including listening, writing, speaking) required.

- Public Relations skills required.
- Training/development skills required.
- Current knowledge of USPS regulations.
- Physical and mental ability to run all of the equipment within the Mail Services operations (inserter, labeler, folders, bundlers, computerized optical character reader, etc.). This requires the physical ability to bend, twist, lift up to 20 pounds regularly, finger small items, see, and hear.
- Ability to read, write, speak and understand English.
- Mental ability to conduct on-going interpersonal interactions, analyze and solve problems essential.
- Ability to actively participate in team development and team-oriented processes and motivate others to do the same required.
- Physical ability to use computer hardware/software required.
- Possess a valid driver's license, acceptable driving record and proof of current vehicle insurance.

**Education and/or Experience:**

A minimum of 1-2 years experience/training in mail room operations, plus 1-2 years supervisory experience are required for this position. An Associate degree or equivalent specializing in business management or related field is required.

**Job Conditions:**

This position requires the incumbent to work in an environment where there may be regular exposure to fumes, building temperature fluctuations, dust, noise, chemicals, odors, fumes and outside weather. Other working conditions may include frequent interruptions, working alone, evening work, working long hours during peak periods, and exposure to computer CRT's.

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First Level Supervisory Approval

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Second Level Approval

## **SAMPLE DISCLAIMER STATEMENTS FOR JOB DESCRIPTIONS**

We've all heard comments that "it's not in my job description." That's why it is recommended to include a disclaimer statement that the job description does not identify all duties or tasks that may be assigned to a position. Here are three suggested samples:

### **Sample #1**

This job description in no way implies that these are the only duties to be performed by the incumbent. At all times, employees will be required to follow any instruction and to perform any other duties within this or a lower job level upon the request of the supervisor. At times employees may also be required to perform higher level duties.

### **Sample #2**

The following information is designed to outline the functions and position requirements of this job. It does *not* identify all tasks that may be expected, nor address the performance standards that must be maintained.

### **Sample #3**

This organization believes that each employee makes a significant contribution to our success. That contribution should not be limited by the assigned responsibilities. Therefore, this position description is designed to outline primary duties, qualifications and job scope, but not limit the incumbent nor the organization to just the work identified. It is our expectation that each employee will offer his/her services wherever and whenever necessary to ensure the success of our endeavors.

**NOTE:** This sample language is an opportunity to offer a culture statement about the organization.