JOB DESCRIPTION TEMPLATE

I. Instructions for Completing the Job Description Template

1. Please use this template for all **newly written** job descriptions, both new **positions** and reclassification requests.

2. Please include information on all of the following factors:*

    I.   **Organization** Summary
    II.   Position Summary--**purpose** of the position
    III.   **Reclassification Request**—Describe the changes in the position since the last review.
    IV.   **Major functions** of the position (including "essential functions" according to ADA requirements)
    V.   The **Classification Factors** of:
        A. Independence/Supervision Received
        B. Scope and Impact
        C. Problem-solving and Decision-making
    VI.   **Skills, abilities and knowledge** required to perform the work
    VII.   **Funding Source/Strategy**. Identify the availability of baseline/ongoing funds by entering FOAP or a funding strategy.
    VIII.   **Signature page.** Supervisor, department head and senior administrator should sign.

    *If a factor does not apply, please indicate "Not applicable."

3. If applicable, two additional sections should be completed:

    i. **Addendum I** for supervisory positions
    ii. **Addendum II** for positions proposed for IT titles

4. In completing the template, please provide sufficient detail to respond to the questions. The format is not intended to limit the information you provide, though we encourage brevity in general and ask that "Major Functions" be limited to no more than two pages.

5. The template incorporates factors of accountability (scope and impact, decision-making), knowledge, complexity, and innovation (both in problem-solving and decision-making).

6. Include the department level **organization chart** and the unit which the position is part of. It should be sufficiently detailed to reflect departmental structure and the position's relationship in the current organization. **Please make sure the position is clearly marked.**

7. If the Template is being submitted for a reclassification request, please include a copy of the previous job description.

JOB DESCRIPTION TEMPLATE

Approved Title			Effective Date	
Title Code	ER Code	FLSA Code	Initials:	Date:

Employee's Name:
Current Title:
Proposed Title:
(If reclassification request)
Supervisor's Name:
Supervisor's Title:
Supervisor's Phone No. & Email Address:
Department:

I.   Organization Summary

Please give a brief description (paragraph) of the **organization (department)** in which the position resides.

II.   Purpose of the Position

Please give a brief description of the overall purpose of the position. Tell "Why does this position exist?"

III. **Reclassification Request**

If you are submitting a request for reclassification, please briefly describe the significant changes that have taken place since the position was last reviewed.

IV. **Major Functions:**
List the major duties and responsibilities of this position, in order of importance. Be brief but include all important duties. Start each functional statement with an action verb. You don't need to use full sentences. Please provide examples (brief ones, please), if they will help illustrate the complexity of the work. Include the **nature** or **kind** of the work performed, the **variety** (limited and narrow? or diverse and wide-ranging?) and the degree of **difficulty** (routine? or very unusual and complex?)

Indicate the total percentage of time spent in a typical work cycle (day, week, month, year) rounded to the nearest 5% for each area of responsibility (total should not exceed 100%).

All "essential functions" (under the ADA) should be listed and indicated with an asterisk (*).

This section should be no more than one to two pages.

Percent of Time	Major Functions ("Essential functions" under ADA should be indicated with an asterisk (*).)

V. Classification Factors

1. Independence/Supervision received:

Check the **type** of supervision received that best fits the position, then describe supervision received in more detail below:

☐   **Close Supervision**: Work is reviewed at several steps along the way for accuracy. (Generally pertains to entry level or trainee positions.)

☐   **Supervision**: Incumbent performs standard and routine assignments independently to conclusion; unusual problems which may require exceptions to procedures or processes are referred to the supervisor. (Generally applies to "journey level" worker able to work independently.)

☐   **General Supervision**: Incumbent develops procedures for performance of a variety of duties or performs complex duties within established policy guidelines; responsible for a defined set of assignments, e.g., all financial activities for the department; is expected to determine and create necessary procedures to set priorities and meet specific goals and objectives of the function or unit. (Typically pertains to advanced/operational, senior professional, unit supervisor)

☐   **Direction**: Establishes procedures for attaining specific goals and objectives in a broad area of work. Only final results are reviewed. (Typically applies to a manager or expert/top level professional.)

☐   **General Direction**: Receives guidance in terms of broad goals and overall objectives and establishes the methods to attain them. Generally the incumbent is in charge of an area of work and typically formulates policy for this area, but does not necessarily have final authority for approving policy.

Additional information on "Independence/Supervision Received"

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ii. From whom does the incumbent receive work assignments (name and title)?

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2. Scope and Impact

Scope applies to the organizational extent or range of operation of a position's primary responsibilities, i.e., ranging from that of a department, addressing daily problems, to a position with campus or University wide scope, where many segments of the University are affected by the actions of an individual position.

Impact refers to the effect of the position's actions on the organization, i.e., how people do business and what they do. A payroll assistant in an academic department or in the Payroll Department may be responsible for resolving individual problems for members of the department. An accountant within either department will have an impact on how several payroll assistants process payroll actions that affect numerous departments and/or individuals.

i. What **scope** or organizational breadth does the position have? Department? College? Division? Campus? Who are the primary constituency(ies) or client group(s) served?

ii. What **impact** does the position have on the recipients of the position's products and services*?*

What are the consequences of actions taken by this position for or on that group(s)? (e.g., Provides administrative support to department professionals? Provides procedural guidelines to campus departments? Manages major software projects critical to achieving campus computing goals?)

3. Problem-solving and Decision-making

i. Please provide examples of three **common** or **typical** problems the incumbent is called on to resolve.

ii. Please provide an example of the **most unusual or complex** problems (relative to i. above) that the incumbent is called on to solve.

iii. Give examples of problems/situations that are referred to this position's supervisor.

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iv. Describe the position's role, if any, in planning the programs, functions, activities, and processes of the organizational unit to achieve unit goals and objectives.

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VI.   Knowledge, Skills, Abilities, and Other Requirements

A. **Knowledge** (acquired information necessary to do the job)
a.   What **kind** of knowledge is required of the position?
    (1) of the procedures, processes and policies of:
        (a) a campus department(s), function(s), or the University?
        (b) an external agency, e.g., OSHA?

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    (2) of a job family or professional field; professional/technical (degree level or comparable knowledge, e.g., financial analysis, accounting)?

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b.   Check the **level** of knowledge required):
    _____   i. Basic or limited: knows the fundamental concepts of the specialty field
    _____   ii. Intermediate: has broad job knowledge; knows and applies the full range of concepts, practices of the specialty field
    _____   iii. Advanced: as a recognized expert among those in the field, applies a high degree of knowledge of the overall field; applies principles, practices, and procedures of a particular field within the discipline to complete difficult assignments.

c.   Provide examples of **how** the person will apply the specified level of knowledge above to resolve typical problems and issues.

    Examples:
    --Applies basic knowledge of University payroll procedures and processes to resolve routine payroll problems for academic and staff employees in the department (problems occur on a weekly basis). Unusual problems are referred to the supervisor.
    -Applies specialized knowledge of University fund-raising policies and campus procedures, the principles of fund-raising and marketing to manage the college's annual fund program.
     --Applies advanced-level knowledge of financial modeling (Master's degree) to develop procedures in support of capital funding programs over 5-20 years.

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    B. Skills (a specific learned activity, generally gained through training, usually indicating a level of effectiveness and efficiency; e.g., basic computer skills to work in Word, Excel; accounting skills)

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    C. Abilities (natural talents or acquired dexterity; potential to perform tasks or functions, e.g., ability to communicate verbally or in writing)

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    D. Other requirements (e.g., certificates, license requirements)

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VII. IDENTIFY FUNDING SOURCES FOR THIS REQUEST:

Account #: _____ **or**
Funding Strategy: _____
_____
_____

VIII. SIGNATURES

    (Note: The signatures below should be appended to the end of the completed description.)

    [CERTIFICATE OF EMPLOYEE:] I certify that the foregoing information is correct and complete and describes my job as I understand it.

                               Employee's Signature   Date

    CERTIFICATE OF IMMEDIATE SUPERVISOR AND DEPARTMENT HEAD:
    I have reviewed the above statements and certify to their accuracy with the exceptions noted here.

_____ _____ _____ _____
Supervisor's signature   Date   Department Head's signature   Date

A description signed by the employee, supervisor and department head is on file in the department.

  Submitted by: _____ Date: _____

I authorize a Reclassification Study to be performed for this position.

  Senior Administrator _____ Date: _____

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ADDENDUM I: SUPERVISORY POSITIONS

1. How many people are supervised directly? _____ How many through others? _____

2. List all the employees this position directly supervises. Expand the chart if necessary. Please be sure that all these positions are clearly shown on the organization chart you attach.

Name	Title	Is this position supervisory?
a.		
b.		
c.		
d.		
e.		
f.		
g.		
h.		
i.		

3. Supervisory functions (perform or effectively recommend) **Check** those that apply.

a. Train?	
b. Handle grievances?	
c. Plan and assign work?	
d. Hire new employees?	
e. Recommend reclassifications and salary increases?	
f. Conduct performance evaluations?	
g. Take disciplinary action?	

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ADDENDUM II: INFORMATION TECHNOLOGY POSITIONS

I. Technical Knowledge and Skills

Describe the depth, scope, and complexity of technical knowledge and skills that are required to satisfactorily perform this job. Are these skills entry level, fully functional level, or advanced level? Give specific examples. (1/2 page or less)

II. Technical Environment

Use this section to describe the technical environment in which the "Major Functions" of the next section are performed.

Include as applicable:

A. Hardware details (operating system(s), number of CPU's, storage, network size/complexity, security, special or custom functionality)

B. Application details (database/app/server vendor, number of records or files, number of users of the application, interfaces with other systems, languages used. Is position maintaining? modifying? creating from scratch?)

C. Users (number of, activities of, novice vs. expert, clerical vs. technical vs. academic)

D. Technical team (Is position stand-alone? or leader? or one of a team? Who supports the hardware, network, DB or web servers, etc.?)