POSITION CLASSIFICATION QUESTIONNAIRE

Date: _____

Nature of request

☐ Re-evaluation
(no significant change in duties)

☐ New Position

☐ Reclassification
(significant change in duties)

☐ Other (please specify)
_____

Position data

Position #: _____   ☐ Vacant   ☐ Occupied

Current Job Data

Job code:		Job Title:	
Grade:		Salary:	

Proposed Job Data

Job code:		Job Title:	
Grade:		Salary:	

Employee / Department data

Employee name		Division/College	
Employee ID#		Supervisor's name	
FTE		Supervisor's title	
DEPTID		Supervisor's phone#	
Department name		Supervisor's "reports to" position #	

PURPOSE AND INSTRUCTIONS

This form is designed to collect detailed information for the purpose of evaluating staff positions. As a supervisor/manager your input is very important as your answers will be used as official documentation for evaluating the job in the University's Global Grading System. Complete each of the yellow highlighted sections on the following pages. You are welcome to further describe the answer to any question at the end of the form, or by attaching additional pages. Please keep the following concepts in mind as you complete the questions:

- *A current organizational chart is required. This must contain actual classification/titles and show who the position reports to, and all direct reports to the position (if applicable). Working titles may also be provided if applicable. This can be simple or handwritten, but must be detailed enough to show how this specific position fits into the organization.*
- **Describe the position as it currently exists**, not as it was in the past, or may be in the future.
- Describe the position **as it is typically conducted** over an extended period of time (e.g. year); do not describe just a particular dimension of the position or a temporary assignment.
- **Avoid understating or overstating the positions' duties and requirements.** It may be helpful to think about the responsibilities as though you were explaining the position to new staff.
- **Consider how the position would normally be performed** by the typical employee. Feel free to discuss responses with employees in the position, colleagues, or other managers.
- If the job is currently occupied, **consider the job only**, not the employee in the job.
- Employees should not move into a new job opportunity without going through a fair and open competitive process or a direct promotion process, whichever is most appropriate for the situation.

If you have any questions about completing this form, contact Human Resource Services.

POSITION SUMMARY

Briefly describe the primary purpose of the position. Please indicate if the focus of the position is one supervising or managing student works or University staff members and the title of positions directly supervised. Specific questions on the nature of this supervision are included in the questionnaire.

KEY RESPONSIBILITIES

List, *in order of importance*, specific major duties and responsibilities and estimate the average percentage of time spent on each. The following chart will assist you in estimating time percentages on an annual basis:

% of Time	PERIODIC EQUIVALENCIES			
	Daily	**Weekly**	**Monthly**	**Yearly (annually)**
5%	30 minutes	2 hours	1 day	2.5 weeks
10%	1 hour	4 hours	2 days	5 weeks
20%	2 hours	1 day	4.5 days	2.5 months

- Document the job as it is *currently performed* (may not match the existing job description).
- Use descriptive terms that relate to the objectives or end result of the job being performed, *not* the steps or tasks involved in performing the job duty or responsibility.
- Each statement should be brief and concise, beginning with an action verb. Use a separate statement for each major duty or responsibility.
- Duties or responsibilities that take less than 10% of the employee's time should not be shown as a separate statement but group with other related duties.
- Consideration should be given to breaking into smaller increments (10% or more) any duties or responsibilities that constitute 30% or more of the employee's time.
- Ensure that a task is not a restatement or overlap of any other statement.
- Review the order of importance and percentage of time.

KEY RESPONSIBILITIES		
	List most important duties and responsibilities first.	% of Time
1.		
2.		

3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.	*Performs other job-related duties as assigned.*	
		100%

How long has the employee been performing these duties?

Have the duties changed since the current incumbent has been in this position? If yes, describe approximately how and when this change occurred.

EDUCATION AND WORK EXPERIENCE

Education

What is the minimum formal education required to perform the duties of the position satisfactorily? List the degree required, along with the appropriate major, if applicable.

Examples:

- A High School diploma or GED is required.
- A Bachelor's Degree with a major in Business Administration is required.

Experience

What is the minimum amount of related work experience required to perform the duties of the position satisfactorily? List the number of years required (in whole years), and describe the type of experience in the space below. If experience can be substituted for the education requirements, indicate the type and amount of experience that will substitute separately.

Example:

- Two years of clerical experience is required. Prior experience in medical office is preferred.

REQUIRED LICENSURE OR CERTIFICATION

List any licenses, registrations, certificates or other credentials that are required to perform the work. (Desired credentials may be listed, but indicate these as preferred vs. required qualifications.)

ORGANIZATIONAL CHART

Attach a current organizational chart that shows how this position fits into the unit. Org charts can be simple and handwritten if necessary, but must clearly show the hierarchy pertaining to the job:
- <u>Reports to</u>: title and name of the leader the job directly reports to
- <u>Peers reporting to the same leader</u>: job title(s) and employee names (or count if large #) that are peer roles.
- <u>Direct reports</u>: title and name (or count if large #) of all employees that report to the job. Indicate if the position is full-time, part-time, regular status, students or regular employees.

LEADERSHIP/SUPERVISORY RESPONSIBILITIES

Select the description that best fits the job being evaluated:

☐	No supervisory responsibility	
☐	Work leadership	▪ Supervises students only ▪ Provides guidance and leadership to employees and/or students for daily activities and assigned projects or tasks ▪ Participates in evaluation of personnel performance (does not directly supervise) ▪ May have project management responsibilities
☐ ☐	Supervisor over a section of a department Assistant Manager over supervisors of a small department	▪ Supervises employees who generally perform the same work or similar work/tasks ▪ May occasionally do the work of those supervised ▪ Provides input for budget preparation
☐ ☐	Manager of one department Manager of more than one department	▪ Provides first-line management to department ▪ Allocates resources according to priorities and within budget parameters ▪ Consults with Director on operational issues (including fiscal matters)
☐	Assistant Director	▪ Supervises managers of functional areas ▪ Typically reports to a Director ▪ Directs complex and varied work ▪ Has major budget and expenditure authority ▪ Develops and recommends policy for the department or program
☐ ☐	Director of one department Director of more than one department	▪ Responsible for one or more departments or programs ▪ Typically reports to a senior executive officer (e.g., VP) ▪ Directs more complex and varied work ▪ Has full budget responsibilities for respective department(s) or program(s) ▪ Recommends and authorizes policy implementation for the department or program

How many position(s) report directly to the job being evaluated?	*Number of students:* _____ *Number of employees:* _____

How many position(s) report indirectly?	*Number of students:* _____ *Number of employees:* _____

If the job supervises others, select the activities below that are part of the job's supervisory responsibilities:	
Recruits, screens, and interviews candidates	Recommends candidates for hire
Approves candidates for hire	Assigns tasks or responsibilities to others
Conducts training of others	Monitors work performance
Conducts performance appraisals	Administers disciplinary action
Recommends salary actions	Approves salary actions
Recommends termination of employees	Approves termination of employees

INDEPENDENT JUDGMENT/PROBLEM SOLVING

Is the job incumbent required to check with someone else for approval or direction? (Provide supporting examples from the last 6 months.)

What policies, procedures, or guidelines apply for the job, and how do they guide the work?

What kinds of problems does the incumbent in this job independently resolve? (Provide examples from the last 6 months.)

Give examples of types of decisions the job incumbent can make without supervisor approval.

Describe the extent of the authority of the incumbent in this job, and provide examples.

Select the description that best fits the job being evaluated:

☐	Performs tasks and duties under direct supervision, using well-defined policies and procedures. Work is reviewed by supervisor. Limited opportunity exists for exercising independent judgment and decision making. Refers most problems to supervisor.
☐	Performs tasks and duties under general supervision, using established procedures and innovation. Chooses from limited alternatives to resolve problems. Occasionally independent judgment is required to complete work assignments. Often makes recommendations to work procedures, policies, and practices. Refers unusual problems to supervisor.
☐	Performs duties within the scope of general University policies, procedures, and objectives. Analyzes problems and performs needs assessments. Uses judgment in adapting broad guidelines to achieve desired result. Regular exercise of independent judgment within accepted practices. Makes recommendations that affect policies, procedures, and practices. Refers exceptions to policy and procedures to the supervisor.
☐	Develops objectives and general policies and procedures for a specific program or functional area of responsibility within general scope of established operational goals and plans. Day-to-day work and decisions do not require direction or review by immediate supervisor. End results are reviewed by supervisor. Strategic issues are referred to supervisor.
☐	Develops strategic direction, goals, plans, and policies for an area of responsibility. Sets broad objectives and is accountable for overall results in respective area of responsibility. Authority to make independent decisions on matters of significance. Requires high degree of independent judgment and problem solving of complex problems.

INTERNAL / EXTERNAL CONTACTS

Type of contact: Select the description that best fits the job, and provide a specific example:

☐	Little or no contact with others outside own workgroup. Primary purpose of contact is to provide and/or receive routine information or documents.
☐	Some contact with others outside own workgroup, such as students, general public, visitors, and/or other University employees. Primary purpose of contact is to provide or obtain explanation or interpretation of information.
☐	Regular contact with others outside own workgroup, such as students, general public, visitors, and/or other University employees. Primary purpose of contact is to explain, clarify, or interpret information. May handle confidential information and some complex matters.
☐	Regular and substantial contact with others outside own workgroup. Contacts usually involve discussions related to policies and programs and may include proposal or grant writing, negotiation with vendors, etc. Handles sensitive, complex, and/or confidential information.
☐	High-level contact with others across the University in key positions. Contact usually involves several areas within the University and/or with community, government, business leaders, media, and dignitaries. Typically handles highly sensitive and/or confidential information.

Provide a specific example of type of contact:

Nature of contact: Select the description that best fits the job, and provide a specific example:

☐	Receives/provides routine information; common courtesy and ordinary tact.
☐	Explains or interprets guidelines or instructions or elicit opinions; moderate tact and cooperation required.
☐	Provides detailed and somewhat complex/sensitive information; contacts are non-routine and require discretion and thoughtful communication efforts.
☐	Exchange of highly complex information; substantial sensitivity, discretion and cooperation required; usually follow-up action is needed.
☐	Solves problems through discussion or persuasion; issues may have substantial impact on the University or be controversial, which requires high level of tact and sensitivity.

Provide a specific example of nature of contact:

INTERNAL / EXTERNAL CONTACTS (cont.)

If contact with others is a routine function of this position, list and explain the contacts for this position both inside and outside the University. (Do not include contacts with the immediate supervisor, co-workers or subordinates of the job being evaluated.)

Persons or organization	Purpose	Frequency	Internal / External

WORK COMPLEXITY

Select the description that most closely matches the level of variety, difficulty and magnitude of the tasks and responsibilities in the job.

☐	Tasks are highly interrelated and simple. Work consists of fairly standard procedures and tasks.
☐	Tasks are multiple and focus more on single processes. Work is sometimes standardized and sometimes varied.
☐	Tasks are multiple and diverse with some interrelationship across processes. Work requires the direct application of a variety of procedures, policies, and/or precedents.
☐	Tasks and responsibilities require integration of diverse functional areas and involve variables that are more abstract. Work is substantially complex and varied, and requires the interpretation of technical and detailed guidelines, policies, and procedures in combination.

Provide example of work complexity:

Describe the nature and variety of the job's most complex, yet typical, work process or responsibility.

MAGNITUDE OF IMPACT

Select the description that best fits the job, and provide a specific example:

☐	Very limited; only on immediate group.
☐	Limited; impact on single department or program.
☐	Moderate; impact on more than one department or program.
☐	Substantial; impact on a major division or broad range of departments or programs.
☐	Significant; impact more than one division or unit and/or entire University system.

Provide example of magnitude of impact:

Briefly describe examples of the typical and key decisions made by the job incumbent that have impact within the immediate department, outside the department, and outside the University (if applicable).

FISCAL RESPONSIBILITY

Does this position…	YES	NO
Have responsibility for a budget?	☐	☐
Negotiate contracts?	☐	☐
Manage grants?	☐	☐
Reconcile accounts?	☐	☐
Manage service or auxiliary operations?	☐	☐

Describe the budget or fiscal authority and accountability of the position, including responsibility for generating and collecting revenue, approving expenditures and reconciling accounts. Describe the size of the budget, extent of signature authority and involvement in the budget process.

Example: this position is responsible for the budget for the Department of Human Resources Services within the Division of Administrative Services. The budget is approximately $500,000 which includes operating temporary staffing services for the campus which generates $20,000 in "revolving" funds annually.

Select the category below which best corresponds with the highest level of fiscal responsibility exercised by this position.

☐ Supports
- Tracks expenditures for an organizational level.
- Has no decision making or spending authority.
- Some budgetary proficiency required to advice on revenues, expenses, and budgetary status and processes.

☐ Recommends
- Makes recommendations on budgetary decisions
- May have authority to approve expense items.
- May recommend on revenue-generating activities and grants.

☐ Controls
- Responsible for the budget for an organizational level of the University.
- Has accountability for all expenses within an organizational unit of the University.
- Has final decision-making authority on all revenues and expenses.

List the amount of the budget under the control of this position: $ _____

WORKING CONDITIONS/PHYSICAL EFFORT

To comply with the Americans with Disabilities Act of 1990 (ADA), which prohibits discrimination against qualified individuals on the basis of disability, it is necessary to specify the physical, mental and environmental conditions of the Essential Duties of the job. Select all that apply:

Physical	Mental	Environmental
On the job the employee must:	On the job the employee must be able to:	On the job the employee:
☐ Bend ☐ Squat ☐ Crawl ☐ Climb ☐ Kneel ☐ Sit ☐ Stand ☐ Walk ☐ Push/Pull ☐ Handle objects (manual dexterity) ☐ Reach above shoulder level ☐ Use fine finger movements ☐ Other:	☐ Read/Comprehend ☐ Write ☐ Perform calculations ☐ Communicate orally ☐ Reason and analyze ☐ Other:	☐ Is exposed to excessive noise ☐ Is around moving machinery ☐ Is exposed to marked changes in temperature and/or humidity ☐ Is exposed to dust, fumes, gases, radiation, infectious diseases, etc. ☐ Drives motorized equipment ☐ Works in confined quarters ☐ Other:
Must carry/lift loads that are: ☐ Light (up to 25 lbs.) ☐ Moderate (25 – 50 lbs.) ☐ Heavy (over 50 lbs.)		

IMMEDIATE SUPERVISOR COMMENTS

Use this section to record your understanding of the job as it currently exists. (Reminder: the job incumbent's performance level is not a part of this review and is not to be considered for this exercise.) If this job has a Research or Information Technology focus, select the appropriate box, complete the respective addendum, and submit with this document.

☐	Research
☐	Information Technology

Additional remarks about this position:

REMINDER: *Attach an organizational chart showing who the position reports to, peer positions that report to the same manager, and all direct reports to the position (if applicable). This provides essential information for processing the PCQ.*

SIGNATURES

_____   _____
Immediate supervisor signature   *Date*

_____   _____
Next level supervisor signature   *Date*

College/division head signature   _Date_

For RPROV Departments:

Division head name
(for evaluation only)

Division head signature   _Date_
(for evaluation only)

HR staff name

HR staff signature   _Date_

Division head name
(final approval)

Division head signature   _Date_
(final approval)