How to Write an Effective PD

Position Description Training

The University of Tennessee System

Learning Outcomes

• Identify the who, what, where, when, why and how of Position Descriptions (PD)
• Apply knowledge learned to write a concise yet descriptive Position Description
• Ability to utilize the new PD and Classification Request Forms

The Who.

Position Descriptions are required
  – Regular staff
  – Post-doctoral Research Associates
Position Descriptions are not required
  – Student positions (Undergrad & Graduate)
  – Faculty
  – Friends
The What.
A Position Description documents a specific set of essential functions and qualifications for one unique position.

It is a formal document describing how a position fits within the unit and organization.

The Where.
The Role of Compensation
- Classify regular staff positions
- Assist with departmental reorganizations
- Process IRIS position forms

The When.
- Vacancies – prior to recruitment
- Annual review
- Significant changes to the department structure or work occur
- New work is created – establishing a Position
- Every 3 years
The Why.

The How: Classification Process

Pitfalls to avoid

Position not Person

- A Position Description should address the needs of the unit – not highlight the incumbent’s special skills or interests
- The minimum experience and education needed should be based on duties – not the incumbent’s qualifications or capabilities
- A PD does not measure work load, or recognize an employee’s performance or longevity
- Classification is not based on incumbent or budgeted salary
Consequences of poorly written PDs can lead to:

- Recruitment or retention problems
- Miscommunication of performance expectations
- Misclassification if importance of position is exaggerated or downplayed

More on “The How”

Getting Started

- Define current business needs
- Identify goals the new position would meet
- Identify type of work necessary to meet goals and competencies needed to successfully perform work
- Identify peer positions – even other institutions – and gather information
- Identify the relationship and role within the unit, including supervisory relationships
- Identify budget for position
A Tale of Two Forms

• Position Description – a formal document that describes a unique position
• Classification Request Form – a form used to request a classification review of a Position Description

Completing the PD Form
Components of the PD

- Position Information
- Position Details including summary and functions
- Competencies/Qualifications (KSA's, education & experience)
- Supervisory/Work Direction Responsibilities
- Independence of Action/ Level of Supervision Received
- Impact of Decisions
- Budget Responsibilities
- Conditions of Employment
- Working Conditions

Position Information

- Should be based on position
- Avoid elevated titles
- Accurately reflect the nature of the job
- Generic yet self-explanatory

Working Title

- Should be based on position
- Avoid elevated titles
- Accurately reflect the nature of the job
- Generic yet self-explanatory
### Position Information

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<thead>
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<tbody>
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<td>Pay Grade</td>
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<td>FLSA Exemption</td>
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<tr>
<td>Position Summary</td>
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</table>

**Position Summary** - Summarize the primary purpose of the position.

### HR Use Only

<table>
<thead>
<tr>
<th>Human Resources Use Only</th>
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Job title, job key, pay grade and FLSA exemption are assigned by the Compensation Analyst. HR completes this section.
Position Details

Position Summary

- Position Summary –
  - What is the main purpose of the position?
  - What does this position exist to do?
  - What is it supposed to accomplish?
  - What is the outstanding feature that makes this position different?
- A position summary statement is a concise statement or "snap shot" that provides an overview of the position.
- Used for job posting.

Sample Position Summary

Under the general direction of the Executive Director, this position conducts institutional research and analysis in support of institutional decision making. The analyst is responsible for the collection, analysis, and dissemination of information on a variety of topics including but not limited to admissions, enrollment management, student progress, program effectiveness and evaluation.
Functions/Responsibilities

Position Responsibilities

Method 1
1) Think of the job in terms of major or key responsibilities or functions (shoot for 3-5)
2) After establishing these, think about specific job duties for each
3) Assign percentage time for each function
4) Condense the job duties into concise action statements

Method 1 example

Budget Management
- Maintains and reconciles ledgers for four accounts.
- Prepares budget and expense reports and provides to faculty monthly.

Administrative Support
- Coordinates biweekly leadership meeting by scheduling, preparing agendas and taking minutes.
- Gathers data and prepares ad hoc reports for use in accreditation documentation.

Event Coordination
- Coordinates departmental events, by looking venues, scheduling speakers and arranging travel and stipends, and preparing invitations.
- Manages event operations by preparing venue set-up and acting as point-of-contact during events.
Position Responsibilities

Method 2
1) Brainstorm a list of all the duties – include tasks that are daily, weekly, monthly and annual
2) Cluster duties into 3-5 like functions/responsibilities – determine a function title
3) Assign percentage time to each function
4) Condense the job duties in each group into concise action statements

Method 2 example
- Manages event operations by prepares venue set-up and acting as point-of-contact during events.
- Maintains and reconciles ledgers for four accounts.
- Coordinates committee biweekly leadership meeting by scheduling, preparing agendas and taking minutes.
- Prepares budget and expense reports to faculty monthly.
- Coordinates departmental events by booking venues, scheduling speakers and arranging travel and stipends, and preparing invitations.
- Gathers data and prepares ad hoc reports for use in accreditation documentation.

Method 2 example continued

Budget Support
- Maintains and reconciles ledgers for four accounts.
- Prepares budget and expense reports to faculty monthly.

Administrative Support
- Coordinates committee biweekly leadership meeting by scheduling, preparing agendas and taking minutes.
- Gathers data and prepares ad hoc reports for use in accreditation documentation.

Event Coordination
- Coordinates departmental events by booking venues, scheduling speakers and arranging travel and stipends, and preparing invitations.
- Manages event operations by preparing venues, acting as point-of-contact during events.
Step 3: Percentage of Time

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Week</th>
<th>Year</th>
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<tbody>
<tr>
<td>5 percent</td>
<td>2 hours</td>
<td>2 1/2 weeks</td>
</tr>
<tr>
<td>10 percent</td>
<td>4 hours</td>
<td>5 weeks</td>
</tr>
<tr>
<td>15 percent</td>
<td>6 hours</td>
<td>1 1/2 month</td>
</tr>
<tr>
<td>20 percent</td>
<td>8 hours</td>
<td>2 1/2 months</td>
</tr>
<tr>
<td>25 percent</td>
<td>10 hours</td>
<td>3 months</td>
</tr>
</tbody>
</table>

Step 4: Action Statements

Condense the specific job duties into concise action statements, beginning each with a present-tense action verb. Use Verb/Object/Explanatory Phrase structure.

Example:

- Audits documents for mathematical accuracy and policy compliance.

*See Handout of Action Verbs

Keep it simple....
Other Language Tips

- Keep each statement in the position details crisp and clear.
- Since the occupant of the position is the subject of your sentence, it may be eliminated.
- Omit any unnecessary articles such as "a", "an", "the", or other words for an easy-to-understand description.
- Avoid using adverbs or adjectives that are subject to interpretation such as "frequently", "some", "complex", "occasional", and "several".
- Spell out acronyms at first instance.

Exercise 1

Management

- Recruits, selects and trains unit staff to perform day-to-day operations
- Establishes standards and policies for unit operations
- Manages unit by planning, coordinating, and controlling unit work and procedures
- Analyzes long-range impact of decisions and plans for use in management decisions

Strategic Planning

- Manages strategic plan by creating, reviewing and implementing annually
- Sets strategic direction by collaborating with senior administration
- Conducts comprehensive organizational review to create strategic plan

Budget

- Ensures fiscal compliance
- Prepares operating budget for unit annually
- Presents budget request and justification annually
Management
Recruits, selects and trains unit staff to perform day-to-day operations. Establishes standards and policies for unit operations. Manages unit by planning, coordinating, and controlling unit work and procedures. Analyzes long-range impact of decisions and plans for use in management decisions.

Strategic Planning
Manages strategic plan by creating, reviewing and implementing for unit annually. Sets strategic direction by collaborating with senior administration. Conducts comprehensive organizational review to create strategic plan.

Budget
Prepares operating budget for unit annually. Presents budget request and justification annually to the board. Ensures fiscal compliance.

Competencies/Qualifications

What are KSAs?

Knowledge is the theoretical or practical understanding of a subject.  
Example: Knowledge of Lean principles.

Skills are the proficiencies developed through experience and training.  
Example: MS Access skills.

Abilities are the qualities of being able to do something.  
Example: Ability to learn new software.
Determining KSAs

Knowledge, skills and abilities statements should be directly tied to the functions and responsibilities.

Exercise 2

Education/Experience

<table>
<thead>
<tr>
<th>Education</th>
<th>Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>High School Degree</td>
<td>Graduate Degree</td>
</tr>
<tr>
<td>Bachelor's Degree</td>
<td>Master's Degree</td>
</tr>
<tr>
<td>Professional Experience</td>
<td>Related Experience</td>
</tr>
<tr>
<td>Leadership Experience</td>
<td>Management Experience</td>
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</tbody>
</table>

Preferred Education and/or years of experience.
**Education/Experience**

**Required (minimum)**
- Tied to duties
- Specific level or type of experience over years of experience
- Not all jobs require degrees
- Where not required by law, an equivalent combination of training and experience may substitute for education – same for certifications/licenses

**Preferred**
- Used to narrow the pool of applicants
- What the ideal candidate should possess
- Specific experience
- Preferred degrees

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**Supervisory / Work Direction Responsibilities**

- "work direction" – May provide day-to-day guidance, training, and direction for staff in addition to other duties. May assign and review work. May make recommendations for corrective action. May lead processes or projects without assigning and reviewing work.
- "supervisory" – Provides day-to-day work direction to employees, and review progress. Hire, train, provide feedback, evaluate performance, and initiate corrective action.

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**Independence of Action/Level of Supervision Received**

- Work is closely monitored by supervisor/manager, level of interaction and procedures are generally prescribed, tasks, duties, and responsibilities are generally standardized and routine in nature, initiative, ideas, and assistance readily available.
- Supervision is provided in writing and by procedures. Tasks are easily measured by supervisors/manager, and supervisor/manager directly reviews work. Subordinates are generally self-directed and can be given general guidelines for specific tasks.
- Work is reviewed in writing and by procedures. Subordinates can be given general guidelines for specific tasks. They receive frequent oral or written feedback from supervisor/manager.
Supervision Received

- **Close** – frequent and detailed review of work
- **General** – instruction, advice and assistance available as needed
- **Broad** – instruction, advice and assistance available upon request
- **Administrative Direction** – advice and assistance limited to accomplishment of broad objectives and policies

Impact of Decisions

**Division/College**

**Campus/Institute**

**System**

**Department, College, or Broad Area**

**Unit or Department**

**Job or Area**

**Division/College**

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**Job or Area**
### Conditions of Employment

#### Background Check
- [ ] Credit Check
- [ ] Drug screens
- [ ] Security Clearance Check

#### Other Conditions
- [ ] Required if this position will work with motors per UT Safety Policy SAT-03.

### Working Conditions

<table>
<thead>
<tr>
<th>Physical Conditions</th>
<th>Amount of Time</th>
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<tbody>
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<td></td>
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*Note: The table contains specific conditions such as working with motors, handling flammable materials, and working in high pressure situations.*
Completing the Classification Request Form

Components of the Classification Request Form

- Organization Chart
- Current Position Information
- Reason for Evaluation
- Justification for the Action
- Peer Positions
Organizational Chart

Include:
• Every position in the unit/department
• Show where they are in the organization up to the division level
• Titles for each position
• Position number
• Incumbents' name (optional)

Org Chart Example

Current Position Information
Current Position Information

Reason for Evaluation

Career Path
- Establishing a new position on career path
- Each move on career path

Classification Review
- Reclassification
- Reorganization
- Temporary to Regular Conversion
- Update
- Vacancy

New Position – Creating a new position
Standard Review Cycle – Statewide review

Justification for the Action
Peer Positions

For review submit:
1. Position Description
2. Classification Request Form
3. Organizational Chart

What we covered:
• The who, what, where, when, why and how of Position Descriptions (PD)
• How to write a concise yet descriptive Position Description
• How to complete the new PD and Classification Request Forms
Thank you for your participation!

Questions?