sulogo

**EXEMPT STAFF - POSITION DESCRIPTION (PD) FORM**

**Purpose:** This document is designed to collect information about the essential functions of the position. The information provided should be an accurate and complete representation of the responsibilities assigned to this position. It is not an evaluation of an employee's performance on the job.

**Instructions:** Accuracy and completeness are critical to this process. Please take the time to review each question and consider your responses carefully. Keep in mind the purpose is to describe and measure what is required to perform the position responsibilities. In answering the questions, it is good to think of the position in terms of work performed over a 12 month period. The form is completed by the supervisor with input from the incumbent/employee. When completed, it must be signed by the employee, the employee's supervisor, and the department chair/head.

If you should have any questions concerning the completion of the PD, please contact the Human Resources Office for assistance.

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| **PART I: POSITION SUMMARY** |

**Employee Information:**

|  |  |
| --- | --- |
| Employee Name: | PeopleSoft Employee ID#: |
| Current USM Position Title: | Internal Position Title (if different than USM title): |
| Dept. Name: | Full-time       Part-time  If less than 12 months, please indicate: |
| Supervisor's Name & Title: | Date Completed: |

**Purpose:** Provide a brief summary statement (no more than 3 sentences) of the primary purpose and function of this position. (Why does this position exist?). Start with:

This position exists to -

Essential Personnel: This position is expected to report to work in emergency situations such as extreme weather conditions when the campus may be closed.

Sensitive: This position has a “substantially significant degree of responsibility for the safety of others and there is a potential that impaired performance in this position could result in death of or injury to the employee or others.”

**Position Responsibilities:** In achieving the general purpose of the position as stated above, list in order of importance the major duties (maximum of seven) performed and the approximate time spent on each. Provide at least two examples to describe the work performed. Percentages cannot exceed 100%.

|  |  |  |
| --- | --- | --- |
|  | Annual % of time |  |
| 1) |  | 1st Most Important Duty |
| Examples: |  |  |
| 2) |  | 2nd Most Important Duty |
| Examples: |  |  |
| 3) |  |  |
| Examples: |  |  |
| 4) |  |  |
| Examples: |  |  |
| 5) |  |  |
| Examples: |  |  |
| 6) |  |  |
| Examples: |  |  |
| 7) |  |  |
| Examples: |  |  |

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| **PART II: POSITION ANALYSIS** |

1. **KNOWLEDGE AND EXPERIENCE**: Knowledge and experience measure the minimum qualifications typically required of an incumbent to reasonably perform duties as indicated in the Position Responsibility section.

**Education:** What is the *minimum* level of formal education in combination with job related experience required to successfully perform the responsibilities of this position? **Check one.**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Minimum Job Related Experience | Minimum Formal Education | | | | | |
|  | **HS Diploma or GED** | **Spec Training** | **Associate’s degree** | **Bachelor’s degree** | **Master’s degree** | **Doctorate or Professional degree** |
| 0-1 year – *no previous relevant professional experience* |  |  |  |  |  |  |
| 1-3 years – *some specialized non-technical skills* |  |  |  |  |  |  |
| 3-5 years – *proficiency in a technique or discipline requiring a background and knowledge of involved practices, precedents, or principles* |  |  |  |  |  |  |
| 5-7 years – *proficiency in a technique or discipline gained through wide exposure to professional experiences and education in a specialized or technical field* |  |  |  |  |  |  |
| 7-10 years – *proficiency in a technique or discipline gained through wide exposure to professional experience and education in one or more specialized or technical fields* |  |  |  |  |  |  |
| >10 years – *mastery of practices, theories, and techniques obtained through wide ranging educational and professional development and experience.* |  |  |  |  |  |  |

***\*note:****For the remainder of this Section, if the qualification/competency is not a minimal qualification (i.e., required), please indicate whether the qualification/competency is:*

*Preferred (preference will be given during the selection process)*

*OR*

*Desired (as in addition to but not related to the required; however, should be a selection determining factor if all other required* ***and*** *preferred are equally met).  There should not be a desired without a preferred already in consideration.*

**Degree Specificity**:

If a degree is required, please specify degree in      .

If in a “related field” is acceptable:  Yes or  No.

**Specific and/or additional experience**:      .

**Technical or Professional Accreditation/Licenses/Registration:** Does this position require a professional license or certificate? If yes, what is the required licensure/certification?

**General Competencies (required knowledge/skills/abilities):** Must be detail oriented and have excellent interpersonal, customer service, organization and planning, prioritization, problem solving, follow through, time management, and oral & written communication skills. Also, must be flexible and possess the ability to successfully handle multiple tasks/projects simultaneously and work well under pressure, independently, and in a team-oriented environment. Proficiency with Microsoft Office Suite (Outlook, Word, Excel, and PowerPoint) is required.

**Additional Competencies** specific to the position:

**Education/Knowledge Rate of Change:** How much or how often the knowledge acquired through formal education *(which is required to reasonably perform the duties of the position)* changes; has to be re-learned or updated; and/or how often new knowledge must be acquired.

Seldom Knowledge required changes little over time.

Sometimes Knowledge requires keeping up-to-date through occasional personal study ***or*** by

monitoring changes and occasionally studying procedures or learning them through on-the-job training. Requires occasional professional development.

Often Knowledge requires keeping up-to-date through regular personal study which could include

attending training courses or professional conferences; by monitoring changes and regularly studying procedures or learning them through on-the-job training; or participation in professional organizations or groups. Requires regular professional development.

1. **COMPLEXITY, PROBLEM SOLVING AND DECISION MAKING**: Complexity is determined by how problem solving and decision making are accomplished. For problem solving, do not focus on the most difficult problems faced, but the typical level encountered over an extensive period of time. Decision making is measured in terms of the opportunity for independent action and the level of direction and supervision received.
2. **How Information is Obtained:** The position needs certain information with which to solve problems and/or make decisions. **Check the one that is most representative.**

**Always available** Information is available and complete.

**Available** Information is available, however, further refinement with some inquiry into related

information may be required.

**Sometimes available** Information exists, however, it is usually incomplete and difficult to obtain. Further

inquiry into related or unrelated information is necessary to fill in gaps.

**Unavailable** Information is vague and details are absent or difficult to isolate.

1. **How information is used:** The position requires processing, examination, or analysis of information in order to initiate or carry out a course of action. Information may be either oral or written, including but not limited to: files, documents, knowledge of events and situations, and other data sources required to reasonably perform the duties of the position. **Check the one that represents the highest level of action and is most representative of the position on a majority basis.**

**Compile:** Collect or match information or enter data in accordance with established methods and practices.

**Examine:** Review information to ensure that it is correct or complete, and act upon information in

accordance with instructions or procedures.

**Analyze:** After approving or rejecting information, a selection is made utilizing an appropriate method of

analysis among existing methods.

**Modify:** After approving or rejecting information, and analyzing; an adaptation is made to existing

methods of analysis.

**Create:** After approving or rejecting information, and analyzing; the position develops and tests new

methods and/or concepts of analysis.

1. **Basis for Decision Making:** While performing the responsibilities of the position, decisions are based on experience utilizing either guidelines from within the University or on practices and professional standards from outside the University. **Check the one that is most representative.**

**Established**: Decisions are made based upon established step-by-step procedures and instructions.

Exceptions are referred to the supervisor.

**Defined**: Decisions are based directly on internal policies, guidelines, research, or scientific procedures.

**General**: With some latitude, decisions are based on internal policies, guidelines, research and scientific

procedures.

**Professional, Management, and/or Regulatory Practices**: Decisions are based on experience utilizing

practices and professional standards, or regulations established outside the University.

**Strategic**: Decisions are based on and significantly impact broad University strategic objectives.

1. **Predictability of Events:** The position may require dealing with unforeseen events which arise causing a deviation from regular work and/or existing plans and strategies. **Check the one box below which best represents the level of unpredictability.**

**Predictability …**

Almost always know which events to expect and when they will occur.

Usually know which events to expect, but not necessarily when or how often they will occur.

Sometimes know which events to expect, but not necessarily when or how often they will occur.

Rarely know which events to expect, or when and how often they will occur.

Based on the above response, indicate whether the deviation from regular work is …

Mild causing a brief interruption.

Moderate causing a noticeable interruption.

Significant causing an interruption which requires a workload adjustment.

Critical causing a redirection of workload or shift in meeting a goal or objective.

Briefly describe an example of the position’s responsibility at the levels checked above in the **Complexity, Problem Solving and Decision Making** section.

1. **Accountability:** The extent to which the work performed by this position is subject to review.

**Check the one that is most representative.**

Checked for accuracy during and throughout the process.

Checked for accuracy upon completion of each task.

Reviewed depending on the degree of complexity, purpose of the work and whether previously performed similar

assignments.

Occasionally checked upon completion of a task.

Checked upon completion of a project or assignment to determine success/failure.

Reviewed for soundness of judgment, general technical adequacy, and conformance with practice and policy.

Reviewed for attainment of objectives and compliance with University policy.

Reviewed for overall accomplishment and impact on the University.

1. **SCOPE (CONTRIBUTION AND IMPACT)**: This factor measures the scope of the position with regard to the overall mission of the University.
2. **Operations Contribution:** Contribution to the development of objectives and operating plans within your scope of responsibility. *Note: objective refers to a developed target, goal, or operating plan to be achieved (e.g. service levels, cost reduction, new program introductions, etc.) and describes what must be undertaken to accomplish organizational area objectives.* **Check the one that is most representative.**

No involvement

Required to give an opinion or assist in objectives and operating plans.

Responsible for developing objectives and operating plans.

Makes the final decision concerning objectives and operating plans.

1. **Creativity and Innovation Contribution**: In the area of internal operating procedures, techniques, equipment design, technology, services, or policies; this position’s involvement in the creation and implementation of improvements or new ideas is to ….

Make minor improvements or suggests changes to a supervisor.

Make improvements to existing operating procedures, techniques, etc.

Create new operating procedures, techniques, etc.

1. **Impact on Operations**: Consider the impact on internal operations and services to other departments, and consider normal operations and decision making – not the effect of negligence.

**Normally, poor or incorrect decisions would …**

**Minor**  Cause minor delays, expenses or inconvenience to others.

**Moderate** Cause moderate delays or expenses and may affect the work of others within the department, but

overall objectives would still be accomplished.

**Significant** Cause significant delays, inefficiencies or expenses. Poor decisions would have a detrimental

short-term impact on internal operations or University objectives.

**Considerable** Cause considerable expense and/or considerable delays to the delivery of services.

Considerable loss and/or damage to the University’s public image would be possible, as would long term damage to the University’s internal operations.

**Critical** Have critical results, and the University could suffer substantial long term financial or operational

loss, or loss of key University constituents.

1. **Impact on Students:** Consider the impact on students.

**Normally, poor or incorrect decisions would …**

**None** Have no direct impact on current student(s).

**Minor** Cause minor delays and inconvenience. The risk of compromising the University’s professional

credibility is minimal.

**Moderate** Cause moderate inconvenience to students, such as that resulting from the late delivery of

information, textbooks and supplies.

**Significant** Affect the quality of services by causing significant delays and inefficiencies or could affect the

physical, psychological, emotional health or academic career of a student.

**Considerable** Cause considerable delays to the delivery of services, and would have a detrimental effect on the

University’s image, causing a substantial long term loss of enrollment. They could also result in damage to the physical, psychological, emotional well-being or academic career of students.

Give three example(s) of specific important duties that are relevant to the statement you checked in the **Scope (Contribution and Impact)** section above.

1. **LEVEL OF CONTACT**: The contact factor measures the responsibility of working with or through people within the University, within USM, or at the local, state and/or national/international level, to get results. Contact should be with a purpose and on a regular, recurring and essential basis. Please select the description that most closely applies to the position.

**Standard** Contacts are mainly internal with co-workers with little or no authority, who work within the same

Department and/or area. Furnish, obtain, or relay specific, factual, **standardized** information.

**Exchanging** Some contacts with individuals from other SU departments and outside organizations, or the

general public for the purpose of **exchanging** factual information and responding to questions which in certain situations may require judgment and interpretation.

**Interpretative** Routine contact with individuals from other SU departments, outside organizations, which require

accurate and broad **interpretation** of departmental and institutional policies; explaining situations and issues and advising people of alternative or applicable course of action.

**Influential** Regular **influential** contact with individuals at all levels, within and outside the University. Duties

require diplomacy, persuasion, and negotiation, resolving disagreements or conflicts, developing and making formal presentations or engaging in communication activities which substantially contribute to solving problems. Interpretation of feedback is required and outcomes are not predictable.

**Critical** Contact with a wide spectrum of individuals at all levels within and outside the University,

including, but not limited to faculty, staff, students, USM personnel, legislators, and the general public. Duties require exceptionally well-developed communication and interpersonal skills in order to successfully handle problems or situations which are **critical** to the success, services, operations, and/or project, even under unfavorable circumstances.

Provide the job titles of individuals who are relevant to the statement you checked:

1. **PHYSICAL DEMANDS FOR GENERAL OFFICE:** Exerting up to 30 pounds of force occasionally (Occasionally: activity or condition exists up to 1/3 of the time) and/or a negligible amount of force frequently (Frequently: activity or condition exists from 1/3 to 2/3 of the time) to lift, carry, push, pull, or otherwise move objects, including the human body. General office work involves sitting most of the time, but may involve walking or standing for brief period of time.

Only if physical demands for this position exceed the aforementioned, list and describe those additional physical demands below.

1. **ORGANIZATIONAL REPORTING:** In the organization diagram depicted below, please indicate the reporting lines by completing the below with the appropriate title(s). The boxes are labeled according to the following key:
   * 1. Job title of the position to which this position’s supervisor reports (2nd Level Supervisor).
     2. The position’s supervisor’s job title (1st Level Supervisor).
     3. The position’s job title.
     4. Examples of other equivalent job titles to this position within or outside of this position’s division/department *(use an =, + or – to indicate that the example position is approximately the same (=), slightly higher (+) or slightly lower (-) match*) than this position.

A:

B:

D:       () C:       () D:

1. **RESPONSIBILITY:** Position is responsible for the operational success of one or several areas, tasks, projects or services (whether or not supervisory responsibilities are included). *Note: A work unit is comprised of a supervisor and their reporting employees whereas; a work leader is within a unit whose position entails acting as a coordinator or resource person who assigns or verifies work (not a supervisory role); and managing includes supervision whereas administering does not.*

**The position …**

Does not include supervisory duties, and it is one of several similar jobs in the work unit responsible for the same

or similar task or activity.

Does not require supervisory duties; however, it is the only position in the work unit responsible for assigned

activities or clearly defined task assignments.

Requires actions as a **work leader**, coordinator, or resource person on whom others may rely to solve work

problems or occasionally manage projects.

Requires managing a **work unit**.

Requires managing a university-wide function, task, or service or is responsible for administering a function, task, project or service within a department.

Requires management of two or more **work units** through subordinate supervisor(s) within a department.

Requires management of the University or a division of the University.

1. **SUPERVISION**: Does this position have supervisory responsibility?  Yes  No

If yes, please continue. If no, proceed to section 10.

Direct-report positions are those positions for which you are responsible for completion of the official PMP (annual performance appraisal). Indirect report positions are those positions that are evaluated by another member of your staff/department. Please select the description that most closely applies to your position.

Provide the job titles of positions for which this position has **direct** supervisory responsibility:

Provide the job titles of positions for which this position has **indirec**t supervisory responsibility:

Please indicate the typical number of student or contingent/temporary employees for which this position has direct or indirect supervisory responsibility:

Using the indicators of “E” for exempt, “N” for non-exempt and “S” for students, please note the supervisory duties assigned to this position for **direct reports only.**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **None** | **Recommends Action to Supervisor** | **Minimal or Limited Responsibility** | **Takes Final Action (with Concurrence of Management, if necessary)** |
| Assign work activities |  |  |  |  |
| Schedule work |  |  |  |  |
| Approve time off |  |  |  |  |
| Coach/counsel/mentor/train |  |  |  |  |
| Initiate disciplinary action/corrective action |  |  |  |  |
| Evaluate performance |  |  |  |  |
| Respond to grievances |  |  |  |  |
| Compensation/promotion/demotion |  |  |  |  |
| Selection and Hire |  |  |  |  |
| Terminate employment |  |  |  |  |
| Any situation involving an employee action |  |  |  |  |

1. **FISCAL RESPONSIBILITY:** Responsibility for managing specific budgeted accounts. Please read the definitions before checking the box that best represents this position’s responsibility.

**None**

**Monitor** Limited responsibility for budget transaction review.

**(Monitor** means to watch and check the budget for a specific purpose (e.g. prepare necessary documentation for supervisory review/approval, tabulate budgetary data, calculate figures, and check for accuracy).

**Analyze**  Considerable responsibility for budget transaction analysis.

**(Analyze** means to separate the budget into elements and critically examine it to arrive at a conclusion; critically review budgetary data, verify figures, and develop budget proposals; recommend allocation of dollars to programs, services or departments, and study all the factors in order to determine a financial solution or outcome.)

**Administer** Full responsibility for planning, forecasting, and final approval of budget transactions.

**(Administer** means to have “total control” of the budget such as formulating, requesting, securing, monitoring, verifying, analyzing (or delegating any of these responsibilities), ensuring full compliance with all institutional budget rules and regulations via your signature authority. )

**Authority to commit the University. If applicable, employee may be required to complete and submit a financial disclosure statement in accordance with the Public Ethics Law.**

In matters that have significant financial impact.

By negotiating and binding the University in matters of significance.

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| **PART III: COMPETENCY CHARACTERISTICS AND SKILLS** |

**Competency Characteristics and Skills:** Listed below are 18 competency characteristics and skills typically attributed to professional and administrative positions. As the supervisor for this position, please determine and rank (1=MOST to 5= LEAST) **up to, but no more than the five traits most important** in terms of successful completion of position duties and responsibilities.

|  |  |
| --- | --- |
| **TRAIT** | **RANK** |
| Customer Service |  |
| Conflict Management |  |
| Creativity/Innovation |  |
| Written Communication |  |
| Verbal Communication |  |
| External Contacts |  |
| Internal Contacts |  |
| Interpersonal Skills |  |
| Organizational Acumen |  |
| Negotiating |  |
| Team Building |  |
| Accountability |  |
| Strategic Thinking |  |
| Decisiveness |  |
| Problem Solving |  |
| Information Technology |  |
| Innovation |  |
| Organizing and Managing |  |
| Leadership |  |

**PART IV: COMMENTS AND SIGNATURES**

Please review and discuss this PD with the employee and make any necessary changes. The next and final step is to complete the below comments and signature portion of the form.

**EMPLOYEE COMMENTS:** This questionnaire may not cover every aspect of your position. If you feel that other information would be important to understand your position, please provide your comments here.

**SUPERVISOR COMMENTS:**

|  |  |
| --- | --- |
| **I understand the information provided on this PD form and my comments on this form are complete, accurate and my own.**  **Employee Signature:** | **Date:** |

By signing this PD, the supervisor certifies that this PD is accurate and reflective of the employee's duties.

|  |  |
| --- | --- |
| **Supervisor Name (Please print): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  **Supervisor Signature:** | **Date:** |

**PART IV - To Be Completed by the Department Head/University VP/Chair**

The department head or University Vice President/Chair should discuss this PD with the employee's immediate supervisor and sign his/her name below.

|  |  |
| --- | --- |
| **Vice President/Chair of Department (Please print): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  **Signature:** | **Date:** |

**Employees/Immediate Supervisors: Please keep a copy of this completed PD for your reference. The final PD is to be sent to the Human Resources Office.**

Date Received in Human Resources Office:

CC: Personnel File