



C A L S T A T E
FULLERTON

Human Resources

Guide to Developing Effective CSUF Position Descriptions

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Purpose and Use of the Position Description Form

The Cal State Fullerton Position Description form is used to describe the overall purpose, primary duties and responsibilities, qualifications, and basic conditions of employment associated with a specific position at this university. A completed position description form is used as a communication tool to describe the position to internal levels of management, the Human Resources office and other administrative offices, outside agencies and, most importantly, to the occupant of the position.

The information contained in the position description is used to make a variety of decisions related to a variety of matters associated with the effective use of human resources such as compensation, recruitment and selection, training and development, performance evaluation, and organizational design. It is important that the information it contains accurately represents the work of the position being described and presents this information clearly.

After a clear and accurate document has been written, it is important to review it with the person who has been newly hired into the position or who currently occupies it. These discussions can help clarify when and how particular tasks are accomplished and other work expectations associated with the position.

Specific instructions for completing each area of the form and examples are provided on the form itself. The following information is intended to be a helpful resource to those developing the actual content that will go into the form. The following information will assist in 1) accurately identifying the nature and scope of the work performed in the position, 2) briefly and accurately describing the work of the position, and 3) creating linkages to the performance criteria and the mission and goals of the organization. Please feel free to contact Human Resources for consultation and additional assistance.

Accurately Identify the Nature and Scope of the Work to be Performed in the Position

Before completing the form, it is important to ensure that the nature and scope of the work of the position has been fully identified. The following are three (3) ways to ensure that the work of the position is well understood before completing the form:

- 1) **Consult a Subject a Matter Expert (SME).** Although SME's can be found outside or inside the organization, usually the person who directly oversee the position or individuals who have overseen similar positions, are the most knowledgeable of what the work of the position will entail. SME's may also be individuals who have held or currently hold a similar position within the organization or within a similar organization. These individuals can often provide very specific information regarding what tasks are performed, what knowledge, skills and abilities are needed to perform the work of a position, and how these would likely be acquired. Human Resources can help you identify appropriate SME's.
- 2) **Refer to Occupational Information.** Pre-existing occupational information such as classification standards, organizational charts, and similar position descriptions that have already been developed and may even be in use elsewhere in the organization or in similar

organizations can be a helpful resource. Classification standards often provide examples of typical duties and responsibilities and descriptors that are commonly used to describe the work of positions within that classification. A current organization chart may provide insight into the level of oversight provided and the level of accountability for outcomes. It may also help to identify similar positions within the organization which can be used for comparison purposes. Although positions can vary widely across organizations, it can be helpful to obtain position descriptions from other universities. Human Resources can help you to obtain and utilize this information. There are also several web based employment services that post brief descriptions as part of their recruitment process. These job postings may provide insight into the responsibilities that are assigned to positions similar to those being developed and the experience and educational credentials that are being requested of candidates for similar positions in outside organizations.

- 3) **Conduct a Job Analysis.** Analyzing the information you have gathered about the anticipated work of the position will lead to a better understanding of the work of the position and how to best describe it on the Position Description form. Job analyses are typically conducted when a position is created to better understand how to best describe it for recruiting and staffing purposes. They are also conducted when changes occur in existing positions, and may also be conducted in order to determine if an injured employee continues to possess the knowledge, skills, and abilities necessary to continue to perform the essential functions of a particular position that was once occupied by the employee. A job analysis is a systematic review of a job to determine: the major functions which comprise the job, the primary duties and responsibilities associated with each major job function, the knowledge, skills, and abilities required to successfully perform each major job function; relevant factors or criteria for evaluating the extent to which these knowledge, skills and abilities are possessed by prospective candidates and/or a current occupant of an existing position.

Although there are several valid methods for conducting job analyses, they usually consist of the following six (6) steps:

1. Identifying and listing each major job function - each major subcomponent of the position.
2. Estimating the amount of time spent performing each function and ranking each.
3. Listing the major job responsibilities and the primary duties associated with each major job function.
4. Identifying and listing the Knowledge, Skills, and Abilities (KSA's) Associated with 1 and 2 above.
5. Determining which KSA's are measurable and how they will be measured.
6. Determining the relative weight of each KSA. Creating examples of varying levels of quality for each.

A step-by-step guide for conducting a job analysis in concert with completing the Cal State Fullerton position description form is presented in the following pages.

Briefly and Accurately Describe the Work of the Position

After the work of the position has been identified, it is important to briefly and accurately describe the position within the sections of the form using the instructions and examples provided in each section as a guide. The following are three (3) tips for composing the content of each section of the form:

- 1) **Write in the Present Tense.** Although some duties and responsibilities may change from month to month in frequency, and priorities can change, it is best to encapsulate what the position will entail over the next year and beyond. Keep in mind that the document can and should be updated if substantive unforeseen changes occur. This will help identify what is part of the position on an on-going basis, rather than focus on events which may occur infrequently or may never come to pass. For example, write “The incumbent provides a variety of clerical support services...” not, “The incumbent will be responsible for...”
- 2) **Write in a “Matter of Fact” Tone.** Do not let the perceived status of a position or the organizational setting in which it is located interfere with how it is described. For example, instead of “The incumbent serves as a liaison to high level offices coordinating highly sensitive matters” write “The incumbent receives visitors, answers incoming phone calls, prioritizes incoming correspondence, and routes interoffice mail.” Describe the position in terms of the main responsibilities and then identify individual duties and tasks associated with each that illustrate the activities required to fulfill each major responsibility. Eliminate unnecessary adjectives or verbiage that detract from describing the actual manual or mental activities and tasks involved. Be careful to describe these activities in a manner appropriate to the scope and level of authority of the position. For example, write “Drafts faculty contracts for management review by collecting all necessary information and using the merge function to complete the template” rather than “Develops and implements faculty contracts.” Write, “Independently researches problems and provides advice consistent with past precedent. Consults higher level management before recommending courses of action that are outside of established procedures” rather than “Provides comprehensive and authoritative guidance and exercises good judgment.” Write “Answers phone calls using a multi-lined phone and directs calls as requested” rather than “Exhibits a high degree of professionalism commensurate with the expectations of the Associate Vice President.” Keep in mind that specific or detailed performance expectations regarding how and when tasks are to be performed may be addressed in operational procedures or when performance goals are established.
- 3) **Write Concise and Comprehensive Statements.** There is no need to describe every detail of what may have to be done by the incumbent of the position. It is important to briefly, yet completely describe the overall reason for the position to exist (under the *Job Summary* section) and the main elements of the position (within the *Major Responsibilities* section) and provide examples of typical responsibilities, duties, and tasks that fall under each (in the *Primary Duties Associated with Major Responsibility* section). This can be done by carefully isolating the major responsibilities of the position and then using duties and tasks as examples of the work performed under each heading. The idea is to describe the nature of the work performed consistent with the level of responsibility and independent judgment that is utilized in the position.

Detailed instructions regarding how to complete specific tasks should not appear in the position description itself, but may be referenced if necessary. For example, a statement such as “Develops Faculty Contracts: Compiles information, initiates development, and coordinates final document preparation, data capture, and issuance” may be overly vague since the level of accountability and the depth of technical knowledge utilized in the course of performing the work is unclear and could lead the person who occupies the position to either take on more or less responsibility for the issuance of faculty contracts than what the management supervisor had intended. A more concise and an accurate statement might be: “Prepares Faculty Contracts for Management Review: Gathers information provided by the Dean and Faculty Affairs & Records and uses template to prepare part-time faculty contracts for final management review and signature. Reviews all documents for correct spelling and grammar and accuracy of dates and salary information before routing for final signature, dissemination, and filing.” Similarly, statements such as “other duties as assigned” that may be too vague to be descriptive of a major area of responsibility may be perfectly appropriate as an item listed under one or more such headings or as a general statement at the end of the main text of the document.

Create Linkages to Performance Criteria and the Mission and Goals of the Organization.

Every position contributes to the accomplishment of the specific goals and mission of the department in which it is located and has an impact on the accomplishment of the mission and goals of the university. Describing the elements of the position in the context of these missions and goals can help to clarify its role in either directly or indirectly accomplishing the work of the work unit, department and the university. These missions and goals do not have to be directly referred to or restated in the document itself, but consideration should be given to how the individual tasks performed support broad organizational goals and these tasks should be phrased accordingly. For example, instead of stating, “Answers routine questions at the front counter”, say “Assists new, returning, and prospective students by responding to routine admissions questions and directing them to the appropriate person for further information when necessary”.

The Major Responsibilities listed in the position description should both logically encompass subsets of similar work, and represent the areas in which an incumbent would have to demonstrate satisfactory performance. Since these *Major Responsibilities* may be used for both evaluating the performance of the occupant of a position and as the basis for identifying selection criteria and interview questions for the purpose of identifying candidates for placement into a vacant position, it is important they distinguish between unlike areas of knowledge, skill, or competence. For example, “Budget and Human Resources Responsibilities” may seem like a good heading since these are both administrative areas, yet this might not be a helpful heading for a single grouping of duties, tasks and responsibilities because an individual may have differing levels of competence and/or demonstrate different levels of on the job performance in each area. It might be best to make these into two separate headings. A similar example might be “Provides Outreach and Counseling Services.” If these two activities go hand in hand, then this is a good title for a Major Responsibility. However, if the outreach activities consist of presenting presentations to groups of people and the counseling activities consist of providing one-on-one guidance and support, these activities may be dissimilar enough that they should be separated into two areas so they can be evaluated separately. See the step-by-step guide to linking position descriptions to organizational and individual performance provided in the following pages for more information.

Developing A Position Description Through Job Analysis: A Step-by-Step Guide

Identifying the major components of a position starts with initially identifying the various tasks or activities that will be performed and then further refining these into the information needed to complete a position description.

1. Write a brief statement or paragraph describing the broad purpose of the intended position in such a way that it is distinguished from all other similar positions in the unit.
2. List all the tasks, duties, and responsibilities associated with the intended position.
3. Group all related tasks, duties, and responsibilities. Eliminate redundant information.
4. List or rank the groupings by order of importance.
5. Describe the groupings with a phrase or sentence which will serve as a heading. Assign the percentage of time that should be allocated for work performed the falls under each heading, being sure that the percentages total 100%. Each “heading” will become a major job function, or **Major Responsibility** on the position description form.
6. Evaluate the Major Responsibilities to determine if they are the areas in which an incumbent would have to demonstrate satisfactory performance in the position, and make any changes as necessary.
7. Refine the tasks, duties and responsibilities as necessary to provide examples of the **Primary Duties** associated with each of the headings defined in steps 5 and 6 above.
8. Identify and list the **knowledge, skills, and abilities** (KSA’s) associated with each grouping and determine if they are measurable for recruitment purpose or performance evaluation purposes. These will be the KSA’s used to evaluate job candidates and create a developmental plan for the incumbent. They also may be used in the job posting and should be used for candidate selection purposes. See “Measurable KSA’s vs. Non Measurable KSA’s” below for more information regarding KSA’s.
9. Identify the type of education, training, certification, and/or experience that would provide the KSA’s identified in step 8 above.
10. Identify any experience and/or educational equivalents to what has been identified in step 9 above.
11. Combine the outcomes of steps 8 and 9 above in a few phrases or sentences. These will be qualifications of the position and will be used in determining what information is included in the **Essential Qualifications** section of the position description form.
12. Review: a) the statement developed in step 1 describing the purpose of the position, b) the major responsibilities and the primary duties associated with each major responsibility and

c) the qualifications and make changes as necessary to ensure constancy. If you believe you know what the classification of the position should be, consult the **CSU Classification and Qualification Standards** to ensure consistency with the standards in each of these areas. The standards will provide an overview of covered positions, examples of typical work, and minimum qualifications information.

13. Review the statement developed in step 1 to ensure that it is broad enough to encompass the Major Responsibilities of the position and revise as necessary. This will become the **Job Summary** on the position description form. This summary will be used to post the position for receipt of applications/resumes.

Measurable KSA's vs. Non Measurable KSA's: A knowledge, skill, or ability which can be exhibited by a job candidate and observed and assessed during an employment interview or other employment examining process. Methods of measuring the possession of a KSA in a job candidate include evaluating responses to structured interview questions and open ended questions, observation of responses to simulated on-the-job events and scenarios, role-playing, and scores achieved on employment tests specifically designed to quantify the candidates possession of job related KSA's. A measurable KSA may be evidenced through direct observation or testing, and/or may have been evidence and verified in past employment or voluntary experience.

There may be KSA's which are measurable for the purpose of performance evaluation, but are not measurable for the purpose of selection because they are only observable on the job. For example, "Ability to Remain Calm Under Pressure" is difficult to measure for selection purposes, but may be very important to successful performance of the position and may be important to monitor after the employee is hired into the position. The following definitions may assist in distinguishing between knowledge, a skill, and an ability:

Knowledge: An organized body of information, usually of a factual or procedural nature, related to the performance of a job function. Knowledge of a job function may be acquired through transferable work experience, education, certification, on-the-job training and/or voluntary work experience.

Example: Knowledge of standard filing processes and practices.

Skill: The proficient manual, verbal or mental manipulation of data, people, or things. The difference between a skill and an ability is that skills are directly observable.

Example: Keyboarding skill sufficient to type at a rate of 45 corrected words per minute.

Ability: The competence to perform an observable behavior or activity at the present time. Ability to perform a task may be indicted by prior experience performing the same task, prior knowledge related to the task, or transferable experience and or knowledge that indicates the capacity or aptitude to perform a task or tasks. Also implied is a lack of discernable barriers, either physical or mental, to performing a specified job function or activity.

Example: Ability to lift over 40 lbs.

Ability to resolve interpersonal conflicts in tense situations.

Linking Position Descriptions to Organizational and Individual Performance:

A Step – by – Step Guide

1. Review the **University's Mission and Goals** and list a few ways in which the work of the position supports these.
2. Review the **Mission and Goals of the Division** and list a few ways in which this position ensures or contributes to their accomplishment.
3. Review the **Mission and Goals of the Department/Work Unit** and list a few ways in which this position ensures or contributes to their accomplishment.
4. Review the **Major Responsibilities** identified on the Position Description form to ensure that the role of the position in the accomplishment of University, Divisional, Departmental, and Unit goals that has been identified is evident. Make changes as necessary to ensure that the Major Responsibilities of the position reflect the main functions of the job in the context of the main functions of the organization itself in which it is embedded.
5. Evaluate the above information in the context of the **observable performance outcomes** that would be expected of the incumbent of the position and make adjustments to the Major Responsibilities and duties associated with each as necessary. List performance goals for associated with each Major Responsibility to ensure that key aspects of the position are adequately differentiated for the purpose of measuring progress achieved in each. Make changes as necessary and update the **Major Responsibilities** and the **Primary Duties Associated with each Major Responsibility** on the position description form. Retain the list of observable and measurable goals and discuss them with the incumbent of the position or the individual who is selected to fill the position if it is currently vacant.

ACTION VERBS

Following is a list of action verbs and definitions to assist in describing duties and responsibilities assigned to a position.

Adopt	Take up and practice as one's own
Advise	Recommend a course of action; offer an informed opinion based on specialized knowledge
Analyze	Separate into elements and critically evaluate; study or determine relationships
Anticipate	Foresee and deal with in advance
Appraise	Give an expert judgment of worth and merit
Approve	Exercise final authority
Arrange	Make preparation for; put in proper order
Assemble	Collect or gather together in a predetermined order from various sources
Assign	Specify or designate tasks or duties to be performed by others
Assume	Undertake; take for granted
Assure	Make certain
Authorize	Approve; empower through vested authority
Calculate	Make a mathematical computation; to reckon by exercise of practical judgment
Circulate	Pass from person to person or place to place
Clear	To submit for approval
Collaborate	Work jointly with; cooperate with others
Collect	Gather; bring together (as in data, etc.)
Compile	Put together information
Concur	Agree with a position, statement, action or opinion

Conduct	Carry on; direct the execution of tasks; take responsibility for acts and achievements of a group; direct handling of tasks toward desired results
Confer	Consult with others to compare views or get new ideas
Consolidate	Bring together
Consult	Seek the advice of others
Coordinate	Initiate, execute, implement and evaluate; bring together work to conclusion
Correspond	Communicate in writing (i.e. memos and other written documents)
Delegate	Entrust to another; appoint as one's representative to perform tasks or duties that may carry specific degrees of accountability
Design	Conceive, create and execute according to plan or direction
Determine	Resolve; fix conclusively; to find out or come to a decision by investigation, reasoning or calculation
Develop	Disclose, discover, perfect or unfold a plan or idea; to set forth or make clear by degrees or in detail
Devise	Come up with something new (perhaps by combining or applying known ideas or principles)
Discuss	Exchange views for the purpose of arriving at a conclusion
Dispose	Get rid of
Disseminate	Disperse
Distribute	Deliver to destinations
Draft	Prepare papers or documents in preliminary form
Endorse	Support or recommend
Ensure	To make sure, certain
Establish	Bring into existence; to make firm or stable; to institute
Estimate	Forecast future requirements; to judge tentatively
Evaluate	Determine or assign a value to (i.e. work, duties, performance); determine significance, worth or condition by appraisal or review

Execute	Put into effect or carry out; to do what is required; perform indicated tasks according to instructions
Expedite	Accelerate the process or progress
Formulate	Develop or devise
Furnish	Provide with what is needed; supply
Implement	Carry out; execute a plan or program; accomplish; put into practice
Improve	Make something better; enhance in value or quality to advance, make progress; make useful additions or amendments; refine
Initiate	Start or introduce
Inspect	Critically examine for suitability
Interpret	Explain something to others mostly in written or presentation form; tell meaning of; present in understandable terms
Investigate	Study through close examination and systematic inquiry
Issue	Put forth or to distribute officially
Lead	Direct the operations, activity and/or performance of individuals
Maintain	Keep in an existing state; to support or continue; update
Monitor	Watch, observe, or check for a specific purpose; keep track of; check for special purpose
Negotiate	Confer with others with intent to reach agreement or come to a conclusion
Notify	Make known to
Operate	Perform a function or control the functioning of; to conduct affairs
Participate	Take part in
Perform	Fulfill or carry out some action or duties accurately in a timely fashion
Place	Locate and choose position for
Plan	To formulate a course of action or program for accomplishment; to have as a specific aim or purpose; intend

Practice	Perform work repeatedly in order to gain proficiency
Prepare	Make ready for a particular purpose; to put together
Process	Carry through an action
Promote	Advocate; advance to a higher level or position; to contribute to the growth
Propose	Declare a plan or intention; put forth idea(s)
Provide	Supply; submit; furnish
Recommend	Advise or counsel a course of action; offer or suggest for adoption; to endorse as fit, worthy or competent
Represent	Act in the place of or for
Report	Give an account of; furnish information or data
Research	To search or examine with continued care; to seek diligently
Review	Examine or re-examine; to give critical examination of
Revise	Refine; rework in order to correct or improve; to make a new, amended, improved or up-to-date version
Schedule	Plan a timetable; to place in a schedule; to appoint, assign or designate for a fixed time
Secure	Gain possession of; make safe
Select	Choose; make a choice
Sign	Affixing a signature
Specify	State precisely in detail or name explicitly
Submit	Provide; furnish; supply
Train	Coach, teach or guide others in order to bring up to a predetermined standard; to teach so as to make fit, qualified or proficient; to make prepared
Verify	Confirm or establish authenticity; substantiate