This questionnaire asks about the position responsibilities and activities. It is not concerned with performance in the position. Please take time to complete it accurately. Attach extra pages or examples if necessary.

|  |  |
| --- | --- |
| **Position Identification** |  |
| **Name:** | **Division/Department:** |
| **Position Title:** | **Date:** |
| **Reports To (Title and Name):** | |
| **Phone #:** | **Location:** |

**GENERAL PURPOSE OF JOB:** Briefly describe the job's primary purpose or contribution to the department or organization - usually 2 to 3 sentences.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**ESSENTIAL DUTIES AND RESPONSIBILITIES:** List the job's **essential or most important functions** and responsibilities. Include all important aspects of the job -- whether performed daily, weekly, monthly, or annually; and any that occur at irregular intervals – and the percentage of time (to the nearest 5%) spent on the responsibility. ***Do not list any responsibilities that are less than 5% of time spent. Please ensure all duties total 100%. Please keep description of duty to 1 or 2 sentences. List in order of importance.***

|  |  |  |
| --- | --- | --- |
| **1** |  | **%** |
| **2** |  | **%** |
| **3** |  | **%** |
| **4** |  | **%** |
| **5** |  | **%** |
| **6** |  | **%** |
| **7** |  | **%** |
| **8** |  | **%** |
| **9** |  | **%** |
| **10** |  | % |
|  | **Total** | **100%** |

**INITIATIVE (INDEPENDENCE OF ACTION):**

What guidelines, procedures, manuals, etc. are available to guide the incumbent’s decision making and actions?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What financial responsibilities, if any, does the position involve? **Check one:**

|  |  |
| --- | --- |
| None. |  |
| Responsible for adhering to the departmental budget. |  |
| Responsible for developing and managing the departmental budget. |  |

**IMPACT OF ERRORS:**

What are the consequences if a serious error is made in the regular course of daily work? Your answer should include what loss or damage could occur to employees, public, company image, financial loss/costs, etc., if an error is made. Also indicate how the error might be corrected.

|  |  |  |
| --- | --- | --- |
| **Type of Error** | **Loss or Damage** | **How the error may be corrected** |
|  |  |  |
|  |  |  |

**SUPERVISORY RESPONSIBILITIES:**

Does the position supervise staff or act as a group leader? **Yes** \_\_\_\_ **No** \_\_\_\_\_

|  |  |
| --- | --- |
| **Typical Actions of a Group Leader** | **Typical Actions of a Supervisor/Manager** |
| Plan and schedule work | Carry out performance evaluations |
| Assign Work | Make hiring recommendations |
| Instruct and train in methods and procedures | Make final decision on hiring |
| Check and approve work | Recommend salary adjustments |
| May participate in the hiring process | Make recommendations regarding unsatisfactory staff members |
|  | Make final decision on promotion |
|  | Make final decision to terminate |

**Check the appropriate level which best describes the type of supervisory/group leader activities performed as an on-going part of the job.** You will also list the position titles which are supervised below.

|  |  |
| --- | --- |
| Group Leader |  |
| Supervisor/Manager |  |

**Titles of Staff Members Who Are Supervised**

|  |  |
| --- | --- |
|  |  |
|  |  |
|  |  |
|  |  |

**How many staff members does this job supervise either directly through subordinate supervisors?**

***Full-time:***

**0 \_\_\_ 1-3 \_\_\_ 4-10 \_\_\_ 11-20 \_\_\_\_ 21-30 \_\_\_ 31-60 \_\_\_ 61-100 \_\_ 101-150 \_\_\_ 151+ \_\_\_**

***Part-time:***

**0 \_\_\_ 1-3 \_\_\_ 4-10 \_\_\_ 11-20 \_\_\_\_ 21-30 \_\_\_ 31-60 \_\_\_ 61-100 \_\_ 101-150 \_\_\_ 151+ \_\_\_**

**MINIMUM EDUCATION**: Select the **minimum** level of education **required** and **preferred** for a **new person entering this position** in order for the person to successfully accomplish the essential duties of this job.

|  |  |  |
| --- | --- | --- |
| **Level of Education** | **Check Only One For Required and one for Preferred** | |
| **Required** | **Preferred** |
| Less than high school education |  |  |
| High school diploma or general education degree (GED) |  |  |
| Specialty training beyond high school (e.g., Vocational School) |  |  |
| Associate's degree (A.A.) or equivalent |  |  |
| Bachelor's degree (B.A./B.S.) or equivalent |  |  |
| Master’s degree (M.A./M.S.) or equivalent |  |  |
| Doctoral degree (Ph.D.) or equivalent |  |  |

**If specific training or degree is required, in what field should it be**? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**CERTIFICATES, LICENSES, REGISTRATIONS**: Indicate any professional certifications, federal/state/local licenses etc., which are **required or preferred** to perform the essential duties of this job.

|  |  |  |
| --- | --- | --- |
| **Type of Certification / Licensing / Registrations** | **Check One** | |
| **Required** | **Preferred** |
|  |  |  |
|  |  |  |

**MINIMUM EXPERIENCE**: How much **concentrated, prior, related, “on-the-job” experience** is **required** for a new person with education as described in the above question **entering into the job**? Select the minimum level of experience needed to successfully accomplish the essential duties of the position. ***This is in addition to the education.***

|  |  |  |  |
| --- | --- | --- | --- |
| **Required Years of concentrated, prior, related, “on-the-job” experience – Check ONLY One** | | | |
| No prior experience necessary |  | 6 - 8 years of experience |  |
| 1 - 2 years of experience |  | 8 - 10 years of experience |  |
| 2 - 4 years of experience |  | 10 - 15 years of experience |  |
| 4 - 6 years of experience |  | 15+ years of experience |  |

**LANGUAGE SKILLS:** Select the level of language (ability to read, write, and speak) **routinely** needed to successfully accomplish the essential duties of this job. **Check only one.**

|  |  |
| --- | --- |
| \_\_\_\_\_ | Able to **read and comprehend** instructions, correspondence, and memos. Writes routine reports and correspondence. Presents information in one-on-one and/or group situations to customers, clients, managers and other employees of the organization and/or responds to questions and complaints. |
| \_\_\_\_\_ | R**eads and interprets** documents such as operating instructions and procedure manuals. **Routinely** writes detailed reports and correspondence and responds to questions and/or complaints. **Routinely speaks effectively before groups of customers, clients, and managers and/or employees of organization.** |
| \_\_\_\_\_ | **Routinely reads, interprets and analyzes** financial reports, general business periodicals, professional journals, technical procedures, and/or governmental / legal regulations. **Routinely** writes complex detailed reports and business correspondence. **Routinely presents information and responds to questions** from groups of managers (may include Top Management), clients, customers, and the general public. |
| \_\_\_\_\_ | **Routinely reads, interprets and analyzes** scientific and technical journals, complex financial reports, and/or legal documents. **Routinely** responds to inquiries or complaints from customers, regulatory agencies, or members of the business community. **Routinely presents information to top management, public groups, and/or boards of directors.** |
| \_\_\_\_\_ | **Routinely reads, interprets and analyzes the most complex documents**. **Routinely** responds to the most sensitive inquiries or complaints. **Routinely develops and presents effective and persuasive speeches and presentations on controversial or complex topics to top management, public groups, and/or boards of directors.** |

**REASONING/PROBLEM SOLVING ABILITY:** Select the level of reasoning/problem solving skills and abilities needed to successfully accomplish the essential duties of this job. **Check only one.**

|  |  |
| --- | --- |
| \_\_\_\_\_\_\_ | Routinely applies **common sense understanding** to carry out instructions furnished in written, oral, or diagram form. Able to deal with problems involving concrete variables in standardized situations. |
| \_\_\_\_\_\_\_ | Routinely **solves practical problems** and deals with a variety of concrete variables in situations where standardization exists. Able to interpret a variety of instructions furnished in written, oral, diagram, or schedule form. |
| \_\_\_\_\_\_\_ | Routinely **analyzes and defines problems, establishes facts, and draws valid conclusions**. Able to deal with nonverbal symbolism (formulas, scientific equations, graphs, etc.). Able to interpret an extensive variety of technical instructions/information in mathematical or diagram form and deals with several abstract and non-concrete variables. |
| \_\_\_\_\_\_\_ | Routinely **applies principles of logical or scientific thinking** to a wide range of **intellectual and practical problems**. Able to deal with nonverbal symbolism (formulas, scientific equations, graphs, etc.,) in its **most difficult phases**. Able to deal with a variety of abstract and non-concrete variables. |

**DECISION MAKING & IMPACT OF ERRORS:** Select the level of decision making skills needed to successfully accomplish the essential duties of this job. **Check only one.**

|  |  |  |  |
| --- | --- | --- | --- |
| \_\_\_\_\_\_ | | Specific to Task – Makes decisions on how to carry out specific day-to-day tasks. **Typically consults with supervisor on anything out of the ordinary.** | |
| \_\_\_\_\_\_ | | Limited – **Makes limited decisions and determines best methods to solve problems** by **referring to established precedents and policies**. Impact of decisions is usually low to moderate cost. | |
| \_\_\_\_\_\_ | | Operational – Makes day-to-day and/or daily decisions used to **support strategic direction**. Decisions **often require thought and are structured**. Decisions tend to be **short term (one year or less)** and usually moderate to high cost. | |
| \_\_\_\_\_\_ | | Management – Makes decisions daily on use of **resources, performance and budgets** and in support of the organization’s strategic direction. Decisions could require additional expenditure of resources if not sound decisions. Decisions tend to be short term **(one year to three years)** and usually moderate to high cost. | |
| \_\_\_\_\_\_ | | Tactical – Makes decisions to support strategic decisions **impacting the entire organization**. Decisions tend to be medium range to long-range **(greater than three years)** and of medium to high significance with significant consequences. | |
| \_\_\_\_\_\_ | | Strategic – Makes decisions on long-term objectives, resources and policies. **Has one of the highest levels of decision making authority.** Decisions have the most **impact across and outside of organization** along with the **maximum cost implications to the organization**. | |

**PHYSICAL AND VISUAL DEMANDS:** How much on-the-job time is spent in the following physical activities? **Show the amount of time by checking the appropriate boxes below.**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Amount of Time** | | | |
| **Physical Activity** | **None** | **Under 35%** | **36% - 70%** | **Over 70%** |
| Stand and/or Walk |  |  |  |  |
| Sit |  |  |  |  |
| Reach with hands and arms, climb or balance, stoop, kneel, crouch, and/or crawl |  |  |  |  |
| Other (Specify): |  |  |  |  |

Does this job require that weight be lifted or force be exerted? **Yes** \_\_\_\_\_ **No** \_\_\_\_\_. **If yes, please check the appropriate box. *(Check only one box that represents the most typical amount of weight that routinely is required to be lifted without additional assistance.)***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Amount of Time – Check only One Box** | | | |
| **Amount of Weight** | **None** | **Under 35%** | **36% - 70%** | **Over 70%** |
| Up to 10 pounds |  |  |  |  |
| Up to 25 pounds |  |  |  |  |
| Up to 50 pounds |  |  |  |  |
| More than 50 pounds |  |  |  |  |

**WORK ENVIRONMENT:**

Describe the typical working environment an individual is routinely required to be exposed and the amount of time**. Check the appropriate level below.**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Amount of Time** | | | | |
| **Work Environment** | **None** | **Under 25%** | **26% - 50** | **51% - 74%** | **Over 75%** |
| General office environment |  |  |  |  |  |
| Mechanical/moving parts |  |  |  |  |  |
| Extreme cold/heat |  |  |  |  |  |
| Toxic or hazardous wastes |  |  |  |  |  |
| Other |  |  |  |  |  |

**Travel:** To what degree does the position require travel as a regular “on-going” part of the role? Do not consider commuting time “to and from” home to work location**. Check only one.**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Amount of Time Required to Travel** | | | | | |
| **None** | **Less than 10%** | **11% - 25%** | **26% - 50%** | **51% - 75%** | **76% - 100%** |
|  |  |  |  |  |  |

**Will overnight travel be required?** Yes \_\_\_\_\_\_\_\_ No \_\_\_\_\_\_\_\_\_\_

**Since no single questionnaire can cover every aspect of a job, we encourage you to use this space to list any additional comments describing the position or any additional comments in general.**