

## OUTLINE OF POSITION DESCRIPTION

### Position Summary:

Briefly describes the primary function of the position or contribution to the department or organization. This section should be no more than a few sentences.

### Major Duties:

Describes the major responsibilities assigned to a position (typically 5-7) listing them in order of importance. Indicate the approximate percentage of time spent in each area of responsibility, estimated over a year timeframe. There should be a minimum of 5% for a given duty. Primary responsibilities should represent the majority of the time allocation, with the total equaling 100%. Miscellaneous or other duties as assigned should be 5%.

Indicate duties, which are “essential functions”. A function may be essential because:

1. The position was established to perform the function
2. A limited number of employees are available to perform the function
3. Removing the function would fundamentally change the position.

It is recommended that this section list duties and responsibilities, but not the tasks through which the employee meets the responsibilities. Tasks may be listed in other documents such as guidelines or desk manuals, or be used as goals for performance evaluations. For example, “answering the telephone” may be a significant duty for a receptionist and a minor task within one duty of the office coordinator to “back up the receptionist during breaks and absences.”

Use the following style:

**What** is done – use an action verb to begin each sentence (see Appendix A for a list of useful action verbs and their meanings).

**How** it is done – summarize the function.

**Why** it is done – the objective or the purpose of the function.

For example: Analyzes financial statements consistent with standard accounting practices to determine credit worthiness of a loan applicant.

WHAT – analyzes financial statements

HOW – consistent with standard accounting practices

WHY – to determine credit worthiness of a loan applicant

### Physical Effort:

This section describes the physical effort which is essential to the position activities. Only one can be selected.

- Sedentary Work - involves mainly sitting; walking and standing are minimal; involves lifting light weight objects limited to 15 pounds.
- Light Work - involves mainly sitting with up to 25% of the activities involving regular standing or walking; involves lifting of medium weight objects limited to 25 pounds.
- Medium Work - up to 40% of the activities involve sitting, standing, squatting, kneeling or walking; involves lifting heavy weight objects limited to 50 pounds; may involve pushing and pulling objects within the weight limits.
- Heavy Work - 50% or more of the activities involve waling, standing, squatting, kneeling or climbing; involves lifting heavy weight object which may exceed 50 pounds.

### Environmental Factors:

This section describes the type(s) of environmental factors which are essential to the position activities. More than one environmental factor may be selected.

- Inside (typically office environment)
- Extreme temperature (hot/cold)
- Elevated Work (Raised platform-scaffold)
- Outdoor
- Hazards

### Supervision Received:

Indicates the level of supervision received by the Appropriate Administrator, using the following terms and associated meanings:

- Immediate - greatest amount of supervision; methods of performing tasks are well established; assistance is readily available.
- General Supervision - some control over administrative or technical aspects of work; definite work objectives are set, but the methods of performing tasks are frequently left to the judgment of the employee with the supervisor providing occasional advice.
- General Direction - general control over administrative aspects of work; plans and organizes methods for completing tasks and managing responsibilities; makes decisions which have a wide impact on the work of others or the work unit.
- Administrative Direction - responsibilities are defined by the scope of the organizational functions; responsible for formulating operational policies for a comprehensive and diversified program; makes top level management decisions.

### Supervision Exercised:

Indicates the type of supervisory responsibilities that are associated with the position.

- No responsibility for supervising the work of others.
- Serves as a lead person for a small work group and/or students (non-manager).
  - Leads are responsible for duties that include, but are not limited to; giving work assignments to employees, providing on-the-job training for assigned duties, attempting to resolve workflow or procedural conflicts; providing input to the Appropriate Administrator on the employee's job performance.
- Manages a unit/function.
  - Typically an Administrator I
- Manages a department(s).
  - Typically an Administrator II or III
- Manages a division.
  - Typically an Administrator IV

### Specialized Materials:

Indicate the equipment, machinery, tools, vehicles and/or office equipment needed for a position.

### Special Working Conditions:

List any overtime requirements, 24/7 on-call, work schedule, etc.

### Required Knowledge, Skills and Abilities:

Identify the knowledge, skills and abilities that are required for the incumbent to possess in order to be successful in the position. Consider such matters as knowledge of applicable policies and procedures (State and/or CSU), analytical skills, interpersonal skills, communication skills, problem-solving ability, decision-making ability, and ability to maintain confidentiality. The knowledge, skills and abilities must be clearly related to the duties and responsibilities of the position. The following may be used as a guide:

- Knowledge – a body of information applied directly to the performance of a function gained from instruction or learned through experience.
  - Working knowledge – requires a sufficient familiarity with the subject to know basic principles and terminology and to understand and solve simple problems.
  - General knowledge – requires sufficient knowledge of a field to perform most work as assigned with little direct supervision. The work calls for comprehension of standard work situations and should include knowledge of most of the significant aspects of the subject.
  - Thorough knowledge – requires wide coverage of the subject matter area. The work calls for sufficient comprehension of the subject to solve unusual as well as common work problems, to advise on technical and policy questions, and to plan work programs.
- Skill – a technical expertise or proficiency.
- Ability – a mental or physical aptitude, capability, or competence.

### Experience and Education:

Experience and education will be set based on CSU Classification and Qualification Standards for non-MPP positions. Additional experience or education should be listed as preferred.

### Preferred Qualifications and/or Specialized Skills and Abilities:

These are skills or attributes unique for the position. They should link to the essential duties in the position description. Specialized skills should define "characteristics" needed to perform the job.

### **Constantly Update and Assess**

In the spirit of continuous improvement and process review, position descriptions should constantly evolve based on emerging priorities or shifts in organizational and departmental needs.

Be sure to regularly assess and update position descriptions in the following ways:

- Let employees know that their position descriptions are always subject to change.
- Ensure that employees understand the difference between their Classification Standard and their position description—although it may be valid when someone says "That's not in my position description," it may indeed be in their classification standard.
- Review position descriptions when you discuss the performance expectations and development plans for the coming year with employees.
- If changes identified in your annual plan involve fundamental additions or deletions to the existing functions described in position descriptions, you may need to incorporate those changes into your employees' position descriptions.

## APPENDIX

The following list of action verbs is designed to assist in finding the strongest and most descriptive verb. The verbs are grouped together by broad categories. This list is followed by some common working definitions to provide consistency in interpreting key verbs at CSU.

<p><b><u>Administrative/Mgmt</u></b> Administer Coordinate Decision maker Direct Lead Manage Oversee Supervise</p> <p><b><u>Admin Action</u></b> Advise Allocate Appoint Approve Assign Authorize Conduct Control Consult Decide Delegate Enforce Establish Execute Implement Initiate Organize Originate Plan Propose Recommend Refer Review Select Train</p> <p><b><u>Taking Action</u></b> Activate Encourage Expedite Implement Install Maintain Motivate Operate Retool Troubleshoot Update</p>	<p><b><u>Analyze/Evaluate</u></b> Appraise Analyze Ascertain Assemble Assess Balance Calculate Calibrate Check Compare Compile Consider Detect Determine Develop Diagnose Distinguish Estimate Evaluate Examine Forecast Identify Improve Inspect Interpret Investigate Judge Measure Plan Propose Rate Reconcile Report Research Resolve Review Solve Study Summarize Survey Test Troubleshoot</p>	<p><b><u>Receive/Provide</u></b> Accept Accumulate Acquire Arrange for Assemble Buy Collect Compile Deliver Distribute Exchange Forward Furnish Gather Inform Inquire Issue Mail Notify Prepare Process Procure Provide Purchase Receive Recruit Request Report Secure Send Solicit Submit Supply Transfer Withdraw</p> <p><b><u>Communication/Interactive</u></b> Communicate Consult Counsel Edit Explain Interview Negotiate Present Teach Write</p>	<p><b><u>Control</u></b> Audit Check Conserve Control Edit Enforce Ensure Guarantee Inspect Monitor Prevent Protect Regulate Restrict Review Schedule Track Validate Verify</p> <p><b><u>Create</u></b> Adapt Create Design Devise Develop Establish Express Fabricate Forecast Initiate Install Originate</p> <p><b><u>Assisting Verbs</u></b> <i>These verbs should only be used when they are an accurate description of the work/role performed.</i> Advise Aid Assist Cooperate Guide Help Participate</p>
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## Definitions of Commonly Used Verbs

<p><b>Adapt</b> – To modify or change to fit specific new conditions or situations.</p> <p><b>Administer</b> – To direct the daily operations of a program and the execution of the program goals.</p> <p><b>Advise</b> – To offer informed opinions or give specialized information to others.</p> <p><b>Analyze</b> – Identify the elements of and critically examine and relate elements to each other or separately or in relation to the whole.</p> <p><b>Allocate</b> – To assign or apportion a resource for a specific reason.</p> <p><b>Appraise</b> – To compare or assess critically with established standards.</p> <p><b>Approve</b> – Exercise final decisive authority resulting in an action.</p> <p><b>Assign</b> – Specify tasks to be performed by others.</p> <p><b>Assist</b> – To help or aid, not directly responsible.</p> <p><b>Authorize</b> – To approve, usually conveys management level authority to approve.</p> <p><b>Bind</b> – Make a commitment resulting in a financial or other obligation or arrangement.</p> <p><b>Commit</b> – Pledge to a particular course of action.</p> <p><b>Compile</b> – Put together or assemble information or data in a new format.</p> <p><b>Conduct</b> – Organize and carry out an activity, often implies leadership role.</p> <p><b>Consult</b> – Actively provide expertise and advice.</p>	<p><b>Control</b> – Direct, regulate or guide the use of resources. May also refer to monitoring activities to ensure compliance with rules or expected results.</p> <p><b>Cooperate</b> – Act jointly with others.</p> <p><b>Coordinate</b> – Organize and regulate the related actions of others to attain results.</p> <p><b>Create</b> – Produce or develop using originality and ingenuity.</p> <p><b>Delegate</b> – Assign another person tasks or duties. Usually conveys the authority of the delegator.</p> <p><b>Develop</b> – To generate and form a plan, idea or concept over time. Usually implies study and analysis.</p> <p><b>Devise</b> – Form an idea or concept or plan that is a combination of ideas and often new application of principles or arrangement of parts.</p> <p><b>Direct</b> – To govern and have control over work operations. Usually implies establishing goals and objective, as well as operating standards.</p> <p><b>Execute</b> – Put into effect and carry out a plan of action.</p> <p><b>Evaluate</b> – To determine the significance, condition or value of something through careful study or appraisal.</p> <p><b>Forecast</b> – Predict future events or occurrences based on knowledge of the topic area and specified assumptions. Assumes analysis.</p> <p><b>Guide</b> – To direct another in a course of action.</p> <p><b>Implement</b> – To fulfill an action and carry it out to the point of usage.</p>
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