

COMPLETING THE REVISED (1/97) POSITION DESCRIPTION QUESTIONNAIRE

General Information and Purpose

The Position Description Questionnaire (PDQ) is the state's official description of an individual classified position or job. In structured questionnaire format, the PDQ is the primary data collection instrument designed to gather information about the specific assignment and characteristics of a single position relative to the job evaluation system's four factors: Decision Making, Complexity, Purpose of Contact and Line/Staff Authority. Because the PDQ is the official record of the position's assignment, it is the basis of classification decisions and documents information used for purposes of the Americans with Disabilities Act (ADA), employee selection, etc. **Every position must have an approved PDQ on file.**

The PDQ is evaluated to determine the proper classification for new, vacant and encumbered (filled) positions. Although employees and supervisors are encouraged to work collaboratively to complete the PDQ, the supervisor and appointing authority are ultimately accountable for establishment of the work assignment, as well as the completeness and accuracy of the PDQ.

This guide is intended to provide general information and assistance in completion of the PDQ. Examples have been selected from a wide variety of jobs, at varying levels; are not presented in any hierarchical order; and are not indicative of a particular level or class of work.

PDQ information should focus on current job content only. Emphasis must be placed on the duties and responsibilities of the position, NOT characteristics or performance of the person doing the job. Examples should be clear and concise statements that provide a thorough and representative description of the work assignment.

Individuals completing the PDQ may wish to contact their agency Human Resources Office for any, all or a combination of the following, and/or other reasons:

- If the job description is being completed for the first time;
- For clarification of the job evaluation factors and levels;
- For additional information regarding reasonable accommodations or for guidance with respect to the ADA;
- For assistance in describing Line/Staff Authority (particularly for staff/senior authority positions), and completing the Special Entry Requirements, Drug Free Workplace and Additional Requirements Sections; and
- For agency specific acceptable formats (other than the PDQ) for documenting information, PDQ availability in other software packages/on disc, and/or guidelines regarding which level of management should sign the PDQ as the "Approving/Reviewing Official."

Each of the following sections parallels the appropriate section of the PDQ. Generally, the document should be typed, but handwritten PDQ's are acceptable, if legible.

I. Position Identification

The agency code is the three character code used by COFRS. (For example, The Department of Revenue is TAA.) Principal Department/University or equivalent means that which is created by law or recognized in personnel rule. If appropriate, provide the position's working title. A working title that differs from the official class title is a common, accepted practice. The remainder of this section is self-explanatory.

II. General Information

The General Information Section provides information about the nature of the position and the work setting, and should illustrate how the position fits into the organization. Coupled with the Job Description Section, this information should give an overall "picture" of the job.

To describe the purpose of the *work unit*, complete the sentence, "This work unit exists to . . ." This statement should illustrate the function of the work unit.

To summarize the purpose of the *position*, complete the sentence, "The position exists to . . ." This statement should illustrate the primary reason the position exists in relation to the function of the work unit.

The remaining sections address the extent of changes in assignment since the previous PDQ, and any impact these changes may have on other positions in the unit and/or organization.

As requested in the PDQ, the following is a "sample" organizational chart documenting important reporting relationships and class titles, position numbers and FTE of the regular staffing pattern.

III. Job Description

Information in this section should provide thorough and concise documentation regarding the scope of what the position does, and how. Duty statements should focus on primary, current, normal, daily duties and responsibilities of the position (not incidental duties, an employee's qualifications or performance, or temporary assignments). Related or similar duties should be combined and written as one statement.

Each statement should be a discreet, identifiable aspect of the work assignment, described in one to three sentences, and should be outcome-based, allowing for alternate means of performing the duty, changes in technology, preferences of employees and supervisors, and accommodations of workers with disabilities, without altering the nature of, and/or the duty itself.

Duty statements should be clear and concise, and described using present tense action verbs. Abbreviations, acronyms and specialized terms/jargon should be avoided (or explained).

Examples:

Designs and implements databases by evaluating documentation requirements and using software packages to create tables, queries, reports, macros and applications to compile and run reports.

Inspects site conditions and scientifically analyzes environmental test data to assess pollutant levels. Identifies necessary remediation measures and standards.

Documents eligibility status by reviewing information and evaluating where individuals meet program requirements.

Inspects and fills soap dispensers in restrooms.

Manages reception office by providing supervision, training and support to two employees, including assigning job duties, providing job training, scheduling work, and monitoring and evaluating performance.

Plans workshops, meetings and conferences by scheduling participants and presenters, arranging for production of materials, acquiring equipment, selecting facilities and service providers and evaluating program effectiveness.

Essential Functions:

In documenting essential functions, functional attributes (if used by your agency) may correlate with how the duty is currently being performed, but may not be applicable for all methods of performing the duty. A person with a disability who is unable to perform a duty according to its current functional attributes should not be eliminated from consideration unless there are no effective alternate ways to perform the function, and there are no reasonable accommodations available to offset his/her functional limitations without posing an undue hardship on the employer. (A reasonable accommodation is a modification or adjustment to the work environment or to the manner or circumstances under which the essential function is customarily performed.)

IV. Decision Making

The decision making information in this section should illustrate (1) the amount of opportunity the position has to use his or her own judgment and independence in making decisions regarding the performance of job duties, and (2) the authority the position has to implement decisions regarding how duties are performed and/or how work assignments are carried out.

Examples should describe typical, highest-level decisions which are made regularly and do not **require** pre-approval by the supervisor in order to be accomplished.

Examples:

Develops and implements procedures for department's grant proposal process including establishing internal criteria for divisions to submit proposals; developing the grant funding manual; creating budget, request, evaluation and authorization forms; instructing other staff in processing steps; and establishing a cross-reference information system (hard-copy and database) by division, funding source and data.

Determines most efficient formats, charts and tables for thorough and accurate reporting of information.

Determines availability of budget funds for expenditures based on current fund balance, upcoming fixed and other projected expenses.

Determines how to meet senior management objectives for department-wide initiatives through the design and delivery of training programs, recruitment and training of instructors and scheduling of employees for certification classes.

In contrast to the above examples of decisions independently made, the following are examples of recommendations positions might make to higher levels for approval.

Recommends organizational development intervention strategies and training programs to help improve employee morale and productivity and promote teamwork.

Recommend when meetings should be held and who needs to attend in order to provide necessary information to supervisors, employees and divisions.

Recommends improvements/changes to existing procedures in the function of the front office and ways to increase efficiency of office functions through purchase of equipment and/or hiring of personnel.

V. Complexity

The Complexity factor is evaluated based on the nature of judgment used relative to available guidelines. The information presented in this section should clarify the amount and kind of analysis and judgment that is expected of the position to perform its assigned work. Examples should focus on typical situations/challenges faced by the position, not those which are unusual or unlikely to occur again.

Examples:

In registering participants for conferences, position reviews registration forms and determines the appropriate fee to charge for requested accommodations.

In order to diagnose illnesses and develop client treatment plans, position considers and evaluates models of psychotherapy and behavioral theories as they relate to client histories and results of tests and observations.

In developing and delivering a project management training program, position considers the organizational circumstances, employee group(s) involved, and the specific training need itself in order to determine the most appropriate training solution to a given situation. Position must rely on general principles, theories and models or training needs assessment, program development and program evaluation to develop an appropriate approach. (Existing guidelines are general and position must tailor his/her approach to the unique situation.)

Position reviews equipment requisitions, accounting and purchasing rules/guidelines, department procedures and vendor files to determine which apply to the purchase of different types of heavy equipment, and selects the best methods of procurement in each case.

To provide additional information regarding the Complexity factor, following is a typical problem/challenge example:

In developing an employee selection examination plan, position considers the cost-benefit ratio in determining which type of test best assesses the skills and abilities critical to job performance.

VI. Purpose of Contact

Purpose of Contact considers the content, purpose and/or nature of the position's interactions and communications with others on a regular basis. (For purposes of this factor, with WHOM the position interacts is immaterial.) Not all of the reasons for communications referenced in the PDQ apply to all positions, so select the one(s) which are suitable and of prime importance. Examples should be provided for only those reasons that are appropriate to the specific position. Since supervisory authority is evaluated in the Line/Staff Authority factor, contacts from supervision given or received should NOT be included in this section.

Examples:

Through the academic advising process, position counsels students about criteria which will be used to evaluate graduate applications, to guide them in determining the courses/preparation they will need to complete as undergraduates.

Represents the department and negotiates agreements with other public entities and municipalities regarding contracts and cost sharing issues.

Defends and justifies department's budget requests before the Information Management Committee, Joint Budget Committee and other legislative committees.

Interviews witnesses and suspects to gather evidence in criminal investigations.

Persuades entities to follow state and/or federal rules and regulations or lose federal funds for projects.

Develops and delivers presentations and formal training sessions on the principles and methods upon which the state's and other public sector planning and budget practices are based, and how they apply to requirements used throughout state agencies.

VII. Line/Staff Authority (Before completing this section, please thoroughly review the guidance and definitions contained in the PDQ document.)

Line Authority is evaluated based on formal, direct control over the quantity and quality of work of subordinate employees (authority to affect pay, status and tenure in an employee-employer relationship).

Staff Authority is based on a unique, expert level of management assigned authority and influence on the direction of policies or programs. As assigned by management as an essential component of the job, this position advises executives and contributes authoritative information regarding an occupational field. These non-supervisory positions are equal to those with line authority, are evaluated based on management delegated authority and unique expertise, and are rated at one of three conceptual levels:

Staff Authority - influence is through direct impact within agency boundaries (e.g., expert on the application of a state system or program within in an agency). This authority crosses division lines and/or influences clients, like local governments.

Senior Authority - influence is through direct impact beyond the boundaries of the immediate principal department or agency (e.g., designer of a statewide program or system, expert in a subject area for other areas of state government).

Leading Authority (rare) - influence is through direct impact on the profession itself, beyond the boundaries of state government (e.g., recognized as a regional, national, or international expert).

Evaluation of this factor does not consider length of service, quality of performance, efficiency, personality, personal or unusual qualifications, pay issues or financial need, volume of work, or unusual diligence.

Starting on page 9, **Sections VIII (Special Entry Requirements), IX (Drug Free Workplace) and X (Additional Requirements)** are not used for job evaluation purposes. Information in these sections must be verified and approved by agencies' Human Resource Offices before accepted as official.

Special entry requirements further define the standard minimum qualifications (MQ's) of the state job class (for example, a Spanish speaking requirement might be necessary for an Administrative Assistant, governmental accounting might be required for an accountant, etc.). Special entry requirements may not exceed (or be less than) the level or amount of education and/or experience required in the established MQ's for the class.

XI. Certification

The certification page makes the PDQ an official, legal document. Supervisors should work closely with employees to make sure each position's PDQ is accurate and clearly understood by all parties involved. Employees should sign the certification section attesting to the fact they have read the PDQ and understand the content. Any disagreements on content or wording should be resolved before the document is submitted for approval. The supervisor/appointing authority has the legal obligation to assign duties and responsibilities to positions he/she supervises, and is therefore accountable for assuring that the PDQ accurately describes the position.