How to Write an Effective PD
Position Description Highlights & Tips

HR Compensation Team

Today's Roadmap
• Focus on the most difficult yet critical parts of the Position Description (PD)
  - summary
  - job functions
  - competencies & qualifications
• Discuss ways to organize and describe work performed for an accurate and easy-to-understand PD

Poorly written PDs can lead to:
• Misclassification if duties are exaggerated or downplayed
• Recruitment or retention problems (under/overqualified hires)
• Miscommunication of performance expectations

It's about the Position not Person
A Position Description should address the business needs of the unit – not highlight the incumbent's special skills or interests.
The minimum experience and education should be tied specifically to the duties – not the incumbent's qualifications or capabilities.
A PD does not measure workload or recognize an employee's performance or longevity.
Classification is not based on current/desired salary or working title.

It starts with the department
Define current position needs.
Define clear job duties and essential functions.
Identify necessary skills and qualifications.
Identify necessary training needs.
Identify any additional positions – new or revised.
Identify job duties and essential functions.
Identify current and desired salary range.
Identify incumbent's performance and potential for promotion.
Identify budget for position.

Consequences of a Misclassified Position
Just Kidding!

Classification & Title
Performance Management
Training & Orientation
Position Description
Recruitment
Legal Compliance
Classification & Title
Performance Management
Training & Orientation
Position Description
Recruitment
Legal Compliance
Components of the PD

- Position Information
- Position Details including summary and functions
- Competencies/Qualifications (KSA’s, education & experience)
- Supervisory/Work Direction Responsibilities
- Independence of Action/Level of Supervision Received
- Impact of Decisions
- Budget Responsibilities
- Conditions of Employment
- Working Conditions

Position Summary

Position Summary Prompts – Summarize the primary purpose of the position.

- What is the main purpose of the position?
- What will the incumbent be held responsible for?
- What is the outstanding feature that makes this position different?

A position summary statement is a concise statement or “snapshot” that provides an overview of the position.

Think of it as the “elevator pitch” of the position or the “abstract” to the paper.

Sample Position Summary

Under the general direction of the Executive Director, this position conducts institutional research and analysis in support of institutional decision making. The analyst is responsible for the collection, analysis, visualization and dissemination of information on a variety of topics including but not limited to admissions, enrollment, student success, and program effectiveness and evaluation.

Functions/Responsibilities

Pro tips:

- 3-5 functions
- Equal 100%
- Functions in decreasing order of importance
- Similar tasks together
- Group “other” duties
- Paragraph/sentence structure is a space saver

Job Family Tips and Pitfalls

Do: Utilize typical functions for ideas
Don’t: Copy level language

For example:

Job Family language: Selects methods, techniques, and evaluation criteria for obtaining results consistent with broadly defined policies, procedures, practices, and professional standards.

Instead: Evaluates and analyzes ABC program deliverables; determines, develops and guides improvements in program operations and the program experience of participants.

https://hr.tennessee.edu/job-families/

Sample Methods

Method A: granular level, working from bottom up, works best for lower-level task driven positions

Method B: big picture, working top-down, works best for high-level more complex jobs
Position Responsibilities

Method A
1) Brainstorm a list of all the duties – include tasks that are daily, weekly, monthly and annual
2) Cluster duties into 3-5 like functions/responsibilities – determine a function title
3) Assign percentage time to each function
4) Condense the job duties in each group into concise action statements

Method A example
• Manages event operations by preparing venue set-up and acting as point-of-contact during events.
• Maintains and reconciles ledgers for four accounts.
• Coordinates committee biweekly leadership meeting by scheduling, preparing agendas and taking minutes.
• Prepares budget and expense reports to faculty monthly.
• Coordinates departmental events by booking venues, scheduling speakers and arranging travel and stipends, and preparing invitations.
• Gathers data and prepares ad hoc reports for use in accreditation documentation.

Method A example continued

Budget Support
• Maintains and reconciles ledgers for four accounts.
• Prepares budget and expense reports to faculty monthly.

Administrative Support
• Coordinates committee biweekly leadership meeting by scheduling, preparing agendas and taking minutes.
• Gathers data and prepares ad hoc reports for use in accreditation documentation.

Event Coordination
• Coordinates departmental events by booking venues, scheduling speakers and arranging travel and stipends, and preparing invitations.
• Manages event operations by preparing venues, acting as point-of-contact during events.

Method B
1) Think of the job in terms of major or key responsibilities or functions (strive for 3-5)
2) After establishing these, think about specific job duties for each
3) Assign percentage time for each function
4) Condense the job duties into concise action statements

Management
• Recruits, selects and trains unit staff to perform day-to-day operations
• Establishes standards and policies for unit operations
• Manages unit by planning, coordinating, and controlling unit work and procedures
• Analyzes long-range impact of decisions and plans for use in management decisions

Strategic Planning
• Manages strategic plan by creating, reviewing and implementing annually
• Sets strategic direction by collaborating with senior administration
• Conducts comprehensive organizational review to create strategic plan

Budget
• Ensures fiscal compliance
• Prepares operating budget for unit annually
• Presents budget request and justification annually

Method B example

Step 3: Percentage of Time

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Week</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 percent</td>
<td>2 hours</td>
<td>2 ½ weeks</td>
</tr>
<tr>
<td>10 percent</td>
<td>4 hours</td>
<td>5 weeks</td>
</tr>
<tr>
<td>15 percent</td>
<td>6 hours</td>
<td>1 ½ month</td>
</tr>
<tr>
<td>20 percent</td>
<td>8 hours</td>
<td>2 ½ months</td>
</tr>
<tr>
<td>25 percent</td>
<td>10 hours</td>
<td>3 months</td>
</tr>
</tbody>
</table>
Step 4: Action Statements

Condense the specific job duties into concise action statements, beginning each with a present-tense action verb. Use Verb/Object/Explanatory Phrase structure.

Example:

"Analyzes assessment data, draws conclusions, and recommends program improvements to meet the changing co-curricular needs of students."

*See Handout of Action Verbs

<table>
<thead>
<tr>
<th>Function/Responsibility</th>
<th>Action Verb</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management</td>
<td>40%</td>
</tr>
<tr>
<td>Recruits, selects and trains unit staff to perform day-to-day operations. Manages unit by planning, coordinating, and controlling unit work and procedures. Analyzes long-range impact of decisions and plans for use in management decisions.</td>
<td></td>
</tr>
<tr>
<td>Strategic Planning</td>
<td>30%</td>
</tr>
<tr>
<td>Manages strategic plan by creating, reviewing and implementing for unit annually. Sets strategic direction by collaborating with senior administration. Conducts comprehensive organizational review to create strategic plan.</td>
<td></td>
</tr>
<tr>
<td>Budget</td>
<td>30%</td>
</tr>
<tr>
<td>Prepares operating budget for unit annually. Presents budget request and justification annually to the board. Ensures fiscal compliance.</td>
<td></td>
</tr>
</tbody>
</table>

• Write in clear, straightforward expressions. Avoid obscurity, inflated vocabulary and convoluted sentence construction.
• The higher-level position, the more the PD should be focused on outcomes, responsibilities and the scope of those accountabilities.
• If a position is designated as a supervisor, there should be a dedicated function on the management of people and the oversight of their work.

Determining KSAs

Knowledge, skills and abilities statements should be directly tied to the functions and responsibilities.
KSA Examples

Job duty 1. Maintains and reconciles ledgers for four accounts. 
KSAs: Knowledge of accounting principles. Mathematical skills. Ability to maintain complex spreadsheets.

Job duty 2. Gathers data and prepares ad hoc reports for use by leadership. 
KSAs: Knowledge of data visualization. Data analysis skills. Ability to present information in organized helpful way.

Job duty 3. Coordinates departmental events by booking venues, arranging catering, preparing invitations, preparing venue set-up, and acting as point-of-contact during events. 
KSAs: Knowledge of local venues. Organizational skills. Ability to juggle multiple competing priorities.

What we covered:
• Organize and describe work
• Position summary
• Job functions
• Competencies/qualifications including KSAs and requirements
• Working titles

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Thank you for your participation!
Questions?
Resources