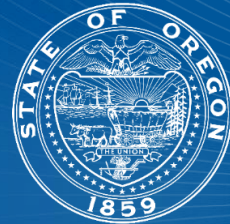


# Department of Administrative Services



## ***THE POWER OF THE POSITION DESCRIPTION***

**It is important to keep in mind that you are considered the subject matter expert and resource on position descriptions (PD) for managers and staff, so it is important to maintain a thorough understanding of the PD.**

## ***Position Description Training***

### ***Key Take Aways***

The PD serves multiple purposes beyond Classifications

Detail is key and why

The importance of using plain language  
No cutting and pasting from class specs

When reviewing and writing a PD, answering the "Who, What, Where, Why, and How?" helps to create a successful PD.

# THE PD MATTERS



- When DAS Cnc Consultants reach out to you to discuss discrepancies found in the PD you've submitted. You may be curious as to why.
- It's just a classification request, right? What's the big deal?
- It is actually a very big deal. The PD is a **key** document within HR that touches and affects multiple facets of an agency.

**As you are working on a PD, you may be looking through a lens that focuses on classifications. However, in addition to classifications we are going to take a brief look at the many ways the PD is utilized.**

# It's not *JUST* a PD It's so much more, let's find out how ..



1

When done correctly PD's help to determine market value of the role and duties in order to maintain pay equity.

The PD has a direct impact to an agency's budget.

2

3

4

5

**As you can see, the PD is what the classification and analysis is based upon and that has a direct impact to an agency's budget.**

## It's not *JUST* a PD It's so much more, let's find out how ..



1

2

As the official document, the PD is used for organizational structure and succession planning, to addressing ADA accommodations, as well as employee relation challenges and lawsuits.

3

4

5

**A few additional items that reflect how the PD impacts an agency HR shop includes organizational structure, ADA accommodations, as well as employee appeals and grievances. A well drafted PD may help minimize an agency's litigation risk.**

## It's not *JUST* a PD It's so much more, let's find out how ..



1

2

3

4

5

A clear PD specifies the qualifications for a specific position and employees who don't fit the criteria are less likely to apply.

This saves valuable recruitment and agency time and money by improving the quality of applicants.

**As you know, information from the PD is used to prepare the recruitment. A successful job announcement is two-fold, it identifies the skills to successfully perform the duties to attract qualified applicants; and those who don't meet the criteria will hopefully stop and think twice as to whether they apply.**

**Did you know, that some failed recruitments can be directly linked back to an ill-written PD? That's something to keep in mind.**

## It's not *JUST* a PD It's so much more, let's find out how ..



1

2

3

4

5

A PD outlines job expectations and how to do it. This transparency removes uncertainty and provides confidence to new employees and brings a sense of purpose and where they fit within the agency.

**Sometimes it's not about the money. When a PD can clearly articulate the duties and expectations, it allows the employee to know where they fit within the division, where they belong within the agency, and their contribution to the organization.**

**Do not under-estimate the power of a strong PD and the employee's confidence and sense of belonging.**

## It's not *JUST* a PD It's so much more, let's find out how ..



1

2

3

4

5

The job skills, duties, and responsibilities outlined in the PD serves as a neutral and objective tool to gauge performance.

A thorough in-depth PD will be easier to identify skill gaps, and where additional training may be needed.

**For managers, a well written PD assists them to ensure the employee is performing their work successfully, helps measure their performance, and helps to identify any gaps or needs for training.**



## It's not *JUST* a PD It's so much more, let's find out how ..



1

The PD has a direct impact to an agency's budget.

When done correctly PD's help to determine market value of the role and duties in order to maintain pay equity.

2

As the official document, the PD is used for organizational structure and succession planning, address ADA accommodations to employee relation challenges and lawsuits.

3

A clear PD specifies the qualifications for a specific role and employees who don't fit the criteria are less likely to apply.

This saves valuable recruitment and agency time by improving the quality of applicants.

4

A PD outlines job expectations and how to do it. This transparency removes uncertainty and provides confidence to new employees and brings a sense of purpose and where they fit within the agency.

5

The job skills, duties, and responsibilities outlined in the PD serves as a neutral and objective tool to gauge performance.

A thorough in-depth PD will be easier to identify skill gaps, and where additional training may be needed.

**For a very unexciting document, the PD is pretty powerful.**

**You have one of the key roles in this process. Helping to facilitate and ensure the PD is a true reflection of the job and not how to make it fit a certain classification is critical because as you can see, the PD creates a domino affect. With this new understanding, you can see why DAS CnC Consultants work so hard and diligently with you when it comes to the PD's because it doesn't start and stop with classifications. As you now know, there's more to the PD than meets the eye.**



***PD REVIEW***  
***Let's Do This!!***

# Start at the Top



STATE OF OREGON  
POSITION DESCRIPTION

Position Revised Date: \_\_\_\_\_

Agency: \_\_\_\_\_

Facility: \_\_\_\_\_

New  Revised

This position is:

- Classified
- Unclassified
- Executive Service
- Mgmt Svc - Supervisory
- Mgmt Svc - Managerial
- Mgmt Svc - Confidential

**DETAIL IS KEY**

## SECTION 1. POSITION INFORMATION

a. Classification Title: _____	b. Classification No: _____
c. Effective Date: _____	d. Position No: _____
e. Working Title: _____	f. Agency No: _____
g. Section Title: _____	h. Budget Auth No: _____
i. Employee Name: _____	j. Repr. Code: _____
k. Work Location (City - County): _____	
l. Supervisor Name: _____	
m. Position: <input type="checkbox"/> Permanent <input type="checkbox"/> Seasonal <input type="checkbox"/> Limited Duration <input type="checkbox"/> Academic Year	
<input type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/> Intermittent <input type="checkbox"/> Job Share	
n. FLSA: <input type="checkbox"/> Exempt <input type="checkbox"/> Non-Exempt	If Exempt: <input type="checkbox"/> Executive <input type="checkbox"/> Administrative <input type="checkbox"/> Professional <input type="checkbox"/> Computer
	o. Eligible for Overtime: <input type="checkbox"/> Yes <input type="checkbox"/> No

Remember, the PD is information based on the position **not** the employee.

**When you're filling out or reviewing a PD, make sure that the information is based on the position itself, not on the employee filling the position and that detail is important. This will be repeated several times, information should match to what's in Workday (WD). If not, the discrepancies should be fixed.**

# Start at the Top



## STATE OF OREGON POSITION DESCRIPTION

Agency: \_\_\_\_\_  
Facility: \_\_\_\_\_  
 New  Revised

Position Revised Date: \_\_\_\_\_

This position is:  
 Classified  
 Unclassified  
 Executive Service  
 Mgmt Svc - Supervisory  
 Mgmt Svc - Managerial  
 Mgmt Svc - Confidential

Position Revised Date

### SECTION 1. POSITION INFORMATION

a. Classification Title: \_\_\_\_\_ b. Classification No: \_\_\_\_\_  
c. Effective Date: \_\_\_\_\_ d. Position No: \_\_\_\_\_  
e. Working Title: \_\_\_\_\_ f. Agency No: \_\_\_\_\_  
g. Section Title: \_\_\_\_\_ h. Budget Auth No: \_\_\_\_\_  
i. Employee Name: \_\_\_\_\_ j. Repr. Code: \_\_\_\_\_  
k. Work Location (City - County): \_\_\_\_\_  
l. Supervisor Name: \_\_\_\_\_  
m. Position:  Permanent  Seasonal  Limited Duration  Academic Year  
 Full-Time  Part-Time  Intermittent  Job Share  
n. FLSA:  Exempt  Non-Exempt If Exempt:  Executive  Administrative  Professional  Computer  
o. Eligible for Overtime:  Yes  No

Best practice - When finalizing a revised PD, update the Position Revised Date. This helps to track and easily identify the most current PD.

**The revision date should be updated to reflect the date revisions were made. These changes include adding or removing duties that impact the overall scope, authority, and purpose of the position. This does not include minor edits (rewording, punctuations, fixing typos, etc.).**

# Start at the Top



STATE OF OREGON  
POSITION DESCRIPTION

Position Revised Date: \_\_\_\_\_

Agency: \_\_\_\_\_

Facility: \_\_\_\_\_

New  Revised

This position is:

- Classified
- Unclassified
  - Executive Service
- Mgmt Svc - Supervisory
- Mgmt Svc - Managerial
- Mgmt Svc - Confidential

## SECTION 1. POSITION INFORMATION

a. Classification Title: _____	b. Classification No: _____
c. Effective Date: _____	d. Position No: _____
e. Working Title: _____	f. Agency No: _____
g. Section Title: _____	h. Budget Auth No: _____
i. Employee Name: _____	j. Repr. Code: _____
k. Work Location (City - County): _____	
l. Supervisor Name: _____	
m. Position: <input type="checkbox"/> Permanent <input type="checkbox"/> Seasonal <input type="checkbox"/> Limited Duration <input type="checkbox"/> Academic Year	
<input type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/> Intermittent <input type="checkbox"/> Job Share	
n. FLSA: <input type="checkbox"/> Exempt <input type="checkbox"/> Non-Exempt	If Exempt: <input type="checkbox"/> Executive <input type="checkbox"/> Administrative <input type="checkbox"/> Professional <input type="checkbox"/> Computer
o. Eligible for Overtime: <input type="checkbox"/> Yes <input type="checkbox"/> No	

## Position Classification ORS Reference

- ORS 240
- 240.205 - Unclassified service
- 240.210 - Classified service
- 240.212 - Management service
- 243.650(23)(a) - Supervisory definition
- 243.650(16) - Managerial definition
- 243.650(25)(1) - Confidential definition

**Each service type is defined by specific ORS's. Be sure to use the resources available on DAS CnC Homepage when designating the service type for a position.**

**Utilize DAS CnC Resources – Familiarize and Bookmark [DAS CnC Homepage](#)**

**Management Designation Checklist**

Management Designation Checklist

Position Number(s): \_\_\_\_\_ Classification Title and Number: \_\_\_\_\_ Employee's Name(s) (or vacant): \_\_\_\_\_

Instructions: Review the position description to determine which service type the position falls within. After review, 1) mark the appropriate service type and then 2) the basis for the management designation. If the position fails to meet any of the categories below, the position should be coded as CLASSIFIED SERVICE.

**1. Position Service Type**

- a. **Unclassified (Executive) Service:** Defined in ORS 240.205 as 1) one executive officer and secretary for a board/commission; 2) department director, agency head, or full-time salaried board/commission member appointed by the Governor and one secretary; 3) division administrator within a state department appointed by director/agency head with Governor approval and one secretary; 4) principal assistants, deputies, and one secretary (Note: Deputy reports to a director, agency head, or administrator listed in items 1) to 3). Principal assistant is a manager of a major agency organizational component reporting directly to an executive/administrative officer listed in items 1) to 3) AND with the approval of the DAS Director; or 5) employees in the Governor's Office.
- b. **Management Service:** Defined in ORS 240.212, positions in state service, not in the exempt or unclassified service, determined to be supervisory, managerial, or confidential. (See below.)

**2. Basis for Management Designation**

Supervisory _____	Managerial _____	Confidential _____
<p><b>Supervisory Designation:</b> A position meets the requirements of the supervisory designation when:</p> <ul style="list-style-type: none"> <li>• The person in the position has the authority to do <b>ONE OR MORE</b> of the following in the interest of the employer: Hire, transfer, suspend, lay off, recall, promote, discharge, assign, reward or discipline other employees, or responsibility to direct them, or to adjust their grievances, or to effectively recommend such action(s).</li> </ul> <p align="center"><b>AND</b></p> <ul style="list-style-type: none"> <li>• The exercise of the authority is not of a merely routine or clerical nature but requires the use of independent judgment.</li> </ul> <p><i>Note: A nurse, charge nurse or similar nursing position may not be deemed to be supervisory unless that position has traditionally been classified as supervisory.</i></p>	<p><b>Managerial Designation:</b> A position meets the requirements of the managerial designation when the person in the position has the authority to:</p> <ul style="list-style-type: none"> <li>• Determine the service or product to be produced by the agency, such as: Policy Implement or discontinue programs Institute or change fees</li> </ul> <p align="center"><b>OR</b></p> <ul style="list-style-type: none"> <li>• Determine the terms upon which the service or product to be offered</li> </ul> <p align="center"><b>OR</b></p> <ul style="list-style-type: none"> <li>• Determine who the service or product will serve</li> </ul> <p align="center"><b>OR</b></p> <ul style="list-style-type: none"> <li>• Is a non-supervisory Human Resource employee who advises and makes recommendations to management and supervisory staff or an Appointing Authority</li> </ul>	<p><b>Confidential Designation:</b> A position meets the requirements of the confidential designation when:</p> <ul style="list-style-type: none"> <li>• The person in the position makes decisions in the collective bargaining process</li> </ul> <p align="center"><b>OR</b></p> <ul style="list-style-type: none"> <li>• The person in this position is required to assist a decision maker(s) in the collective bargaining process in areas such as: Research bargaining concepts Develop bargaining concepts Compile bargaining concepts Prepares materials for bargaining concepts Computes costs to agency's bargaining concepts Makes recommendations regarding bargaining concepts Takes notes during collective bargaining Takes minutes and/or types minutes from collective bargaining</li> </ul> <p><i>Note: There are no confidential employees in an agency where the employees are not represented by a union.</i></p>

**The Management Designation Checklist is a great tool when trying to identify the appropriate service type and is always under utilized. This worksheet will help to guide you in identifying the applicable service type and is located on our DAS CnC Homepage.**

# Section 1 (a-o)



STATE OF OREGON  
POSITION DESCRIPTION

Position Revised Date: \_\_\_\_\_

Agency: \_\_\_\_\_

Facility: \_\_\_\_\_

New  Revised

This position is:

- Classified
- Unclassified
- Executive Service
- Mgmt Svc - Supervisory
- Mgmt Svc - Managerial
- Mgmt Svc - Confidential

**DETAIL IS KEY**

## SECTION 1. POSITION INFORMATION


a. Classification Title: _____	b. Classification No: _____
c. Effective Date: _____	d. Position No: _____
e. Working Title: _____	f. Agency No: _____
g. Section Title: _____	h. Budget Auth No: _____
i. Employee Name: _____	j. Repr. Code: _____
k. Work Location (City - County): _____	
l. Supervisor Name: _____	
m. Position: <input type="checkbox"/> Permanent <input type="checkbox"/> Seasonal <input type="checkbox"/> Limited Duration <input type="checkbox"/> Academic Year <input type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/> Intermittent <input type="checkbox"/> Job Share	
n. FLSA: <input type="checkbox"/> Exempt <input type="checkbox"/> Non-Exempt	If Exempt: <input type="checkbox"/> Executive <input type="checkbox"/> Administrative <input type="checkbox"/> Professional <input type="checkbox"/> Computer
o. Eligible for Overtime: <input type="checkbox"/> Yes <input type="checkbox"/> No	

**All data should match in Workday**

**A few fields to highlight. Basic rule of thumb, pay attention to the details, be sure the Class Title and Classification No. match; make sure the Position Number being used (PPDB, WD, or both) as an identifiable number by your agency matches what's in WD and ORPICS. Again, any discrepancies should be researched and corrected BEFORE finalizing the PD.**

# Section 1 (a-o)



 STATE OF OREGON  
POSITION DESCRIPTION

Agency: \_\_\_\_\_  
Facility: \_\_\_\_\_  
 New  Revised

Position Revised Date: \_\_\_\_\_

This position is:  
 Classified  
 Unclassified  
 Executive Service  
 Mgmt Svc - Supervisory  
 Mgmt Svc - Managerial  
 Mgmt Svc - Confidential

**SECTION 1. POSITION INFORMATION**

a. Classification Title: \_\_\_\_\_ b. Classification No: \_\_\_\_\_  
c. Effective Date: \_\_\_\_\_ d. Position No: \_\_\_\_\_  
**e. Working Title: \_\_\_\_\_** → Working Title - Should fit the position  
f. Agency No: \_\_\_\_\_  
g. Section Title: \_\_\_\_\_ h. Budget Auth No: \_\_\_\_\_  
i. Employee Name: \_\_\_\_\_ j. Repr. Code: \_\_\_\_\_  
k. Work Location (City - County): \_\_\_\_\_  
l. Supervisor Name: \_\_\_\_\_

m. Position:  Permanent  Seasonal  Limited Duration  Academic Year  
 Full-Time  Part-Time  Intermittent  Job Share

n. FLSA:  Exempt  Non-Exempt  
If Exempt:  Executive  Administrative  Professional  Computer

o. Eligible for Overtime:  Yes  No

**Working Title should be something that fits what the position is doing and not the classification title. It can be confusing if all your Office Specialist 2 classifications are also called Office Specialist 2 for working titles.**


**For example, your agency's Receptionist (PSR2) would be better with a Working Title of Receptionist versus Director of Incoming Audio Data and Information. Working titles should reflect the position's purpose and level of responsibility. It would be confusing to the public to think they were talking to the Director of Incoming Audio Data and Information and expecting a decision made at an executive or administrative level when they are speaking with the Receptionist (PSR2) who was simply taking down or providing information.**

**There are distinct levels and positions when using Director or Administrator is correct.**



# Section 1 (a-o)



 **STATE OF OREGON  
POSITION DESCRIPTION**

Agency: \_\_\_\_\_  
Facility: \_\_\_\_\_  
 New  Revised

Position Revised Date: \_\_\_\_\_

This position is:  
 Classified  
 Unclassified  
 Executive Service  
 Mgmt Svc - Supervisory  
 Mgmt Svc - Managerial  
 Mgmt Svc - Confidential

**SECTION 1. POSITION INFORMATION**

a. Classification Title: \_\_\_\_\_ b. Classification No: \_\_\_\_\_  
c. Effective Date: \_\_\_\_\_ d. Position No: \_\_\_\_\_  
e. Working Title: \_\_\_\_\_ f. Agency No: \_\_\_\_\_  
g. Section Title: \_\_\_\_\_ h. Budget Auth No: \_\_\_\_\_  
i. Employee Name: \_\_\_\_\_ **j. Repr. Code:** \_\_\_\_\_  
k. Work Location (City - County): \_\_\_\_\_

l. Supervisor Name: \_\_\_\_\_

m. Position:  Permanent  Seasonal  Limited Duration  Academic Year  
 Full-Time  Part-Time  Intermittent  Job Share

n. FLSA:  Exempt  Non-Exempt If Exempt:  Executive  Administrative  Professional  Computer  
o. Eligible for Overtime:  Yes  No

**Repr Code: This indicates how this employee is represented. Classified, unclassified, management, executive service.**

The Repr Code is an important field on the PD. It identifies if an employee is management service, unrepresented, or represented and identifies by which union.

Some PD's submitted are missing this field. As a reminder, this PD is an employee's official document and should provide all employment details as it pertains to them. WD is not a substitute or replacement for the PD as this is a signed document by the employee, manager, and appointing authority. So, it's important that all the fields presented on the PD template are completed (exception being the Budget Auth No).

Be sure to download and use the newest PD template located on the DAS CnC Homepage.

# Section 1 (a-o)



STATE OF OREGON  
POSITION DESCRIPTION

Position Revised Date: \_\_\_\_\_

Agency: \_\_\_\_\_

Facility: \_\_\_\_\_

New  Revised

This position is:

- Classified
- Unclassified
- Executive Service
- Mgmt Svc - Supervisory
- Mgmt Svc - Managerial
- Mgmt Svc - Confidential

**Utilize DAS CnC Resources -  
FLSA Designation Worksheet**

## SECTION 1. POSITION INFORMATION

a. Classification Title: _____	b. Classification No: _____
c. Effective Date: _____	d. Position No: _____
e. Working Title: _____	f. Agency No: _____
g. Section Title: _____	h. Budget Auth No: _____
i. Employee Name: _____	j. Repr. Code: _____
k. Work Location (City - County): _____	
l. Supervisor Name: _____	
m. Position: <input type="checkbox"/> Permanent <input type="checkbox"/> Seasonal <input type="checkbox"/> Limited Duration <input type="checkbox"/> Academic Year	
<input type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/> Intermittent <input type="checkbox"/> Job Share	
n. FLSA: <input checked="" type="checkbox"/> Exempt <input type="checkbox"/> Non-Exempt	If Exempt: <input type="checkbox"/> Executive <input type="checkbox"/> Administrative <input type="checkbox"/> Professional <input type="checkbox"/> Computer
	o. Eligible for Overtime: <input type="checkbox"/> Yes <input type="checkbox"/> No

**FLSA - Important FLSA is correct on the PD, matches on the offer letter, and matches in WD. Be sure these are all in alignment.**

**FLSA is a Federal Fair Labor Standards Act designation and qualifiers are outlined within the worksheet located on the DAS CnC Homepage. For the purposes of the PD, this is related to the FLSA designation. Any language within the CBA is not used when evaluating the appropriate FLSA designation. Always start with the FLSA designation worksheet.**

**Be sure to download and use the newest FLSA template (now includes Computer exception) located on the DAS CnC Homepage.**

## Section 2



### SECTION 2. PROGRAM AND POSITION INFORMATION

- a. Describe the program in which this position exists. Include program purpose, who's affected, size, and scope. Include relationship to agency mission.
- b. Describe the primary purpose of this position, and how it functions within this program. Complete this statement. The primary purpose of this position is to:

**Section 2(a) - Is for background information and describes the agency and where this position fits within the agency.**

**Section 2(b) - Should be specific to the job. What DOESN'T belong here are duties, education, KSAs, or other things you're looking for in a candidate.**

# Section 2



## SECTION 2. PROGRAM AND POSITION INFORMATION

- a. Describe the program in which this position exists. Include program purpose, who is affected, size, and scope. Include relationship to agency mission.

The Department of Administrative Services ("DAS") is the central administrative agency that leads state government to implement the policy and budget decisions of the Governor and Oregon Legislature.

Employing an enterprise-wide perspective, DAS serves state government by developing and upholding accountability standards to ensure productive, efficient, and stable management infrastructure and essential business services including technology, financial, procurement, publishing/distribution, human resources and facility asset management. These services support and enable state and local government agencies to carry out their missions, benefiting all Oregonians.

The Chief Human Resource Office (CHRO) provides enterprise-wide policy leadership necessary to maintain a reliable and qualified workforce for the state of Oregon. The Office's centralized policy functions enable executive branch agencies to share resources and expertise with which to manage their human resource assets and capital in a cost-effective way. Specific policy functions are within Labor Relations, Statewide Workforce Development, Executive Recruitments, Classification and Compensation, Human Resource Policy Management and other related policies associated with human resource administration and development.

DAS\_PDTemplate\_NonSupervisory\_04/2012

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The Classification and Compensation Unit is responsible for development and maintenance of the state's classification and compensation programs, covering nearly 42,000 positions statewide.

**Section 2(a) - Describes what the program does. It should state how it contributes to the purpose of the agency. Be sure to include general information about the program size (employees, budget), scope (geographic region, statewide), and who or what the program affects.**

## Section 2



### SECTION 2. PROGRAM AND POSITION INFORMATION

- a. Describe the program in which this position exists. Include program purpose, who's affected, size, and scope. Include relationship to agency mission.



- b. Describe the primary purpose of this position, and how it functions within this program. Complete this statement. The primary purpose of this position is to:

This job gives secretarial support for the engineers in the (specific) unit by typing letters and reports and keeping accurate records.

- The primary purpose should **concise and direct**.

**Section 2(b) - Should be the primary purpose of the position and should be direct and concise. Briefly summarize why the position exists and its role in reaching program objectives (e.g. supportive, technical, supervisory, program manager).**

# Section 2



## SECTION 2. PROGRAM AND POSITION INFORMATION

- a. Describe the program in which this position exists. Include program purpose, who's affected, size, and scope. Include relationship to agency mission.



- b. Describe the primary purpose of this position, and how it functions within this program. Complete this statement. The primary purpose of this position is to:

Provide policy and legislative advice to division leadership by acting as the division's senior legislative advisor. This position also oversees the rulemaking process and works with division management to develop legislative concepts and policy option packages.

- The primary purpose should be concise and direct.
- Use plain language.

**Section 2(b) – Think in terms of describing a job to a new friend.**

# Section 2



## SECTION 2. PROGRAM AND POSITION INFORMATION

- a. Describe the program in which this position exists. Include program purpose, who's affected, size, and scope. Include relationship to agency mission.



- b. Describe the primary purpose of this position, and how it functions within this program. Complete this statement. The primary purpose of this position is to:

This job directs and monitors the work of technical and professional employees (of the "X" unit) who collect and analyze ("Y") samples to ensure industry compliance with environmental rules and regulations.

- The primary purpose should be concise and direct.
- Use plain language.
- **If the statement is not clear or specific, it will create confusion and be difficult to comprehend.**

**Section 2(b) - A few sentences are usually sufficient to describe most jobs.**

# Section 2



## SECTION 2. PROGRAM AND POSITION INFORMATION

- a. Describe the program in which this position exists. Include program purpose, who's affected, size, and scope. Include relationship to agency mission.

- b. Describe the primary purpose of this position, and how it functions within this program. Complete this statement. The primary purpose of this position is to:

This position reports to the program manager and has substantial responsibilities in addressing high-level policy issues across all levels of administrative programs at the agency, including formulating statewide policy positions, providing agency strategic priorities, and responding to and resolving critical issues. The position requires the ability to work cooperatively with program leadership teams and staff, other state agencies, federal agencies, private organizations, the ability to adapt to changing needs and working in dynamic situations. The need to achieve successful results while balancing many priorities and responsiveness to the needs of leadership team members and others and actively seek feedback on work provided. Must be able to work with a computer for long periods of time. Must be able to work effectively in a stressful environment, managing workload to meet requirements or deadlines, organizing and prioritizing multiple tasks as part of daily workload. Skill in synthesizing voluminous and diverse facts, opinions, and materials into usable work plans is necessary.

- The primary purpose should be concise and direct.
- Use plain language.
- If the statement is not clear or specific, it will create confusion and be difficult to comprehend.
- Do NOT list duties, education needed, KSAs, expectations, hopes, dreams, fears, wishes.

**Section 2(b) - Do NOT list the duties, the education needed, expectations, hopes, dreams, fears, wishes.**

**The following are a few things that are not the purpose of why the position exists: (1) The ability to .., (2) Skill in .., (3) Requires .., (4) Education .., (5) Reports to ...**

**Those statements belong elsewhere in the PD, not here.**



# Section 3 - Duties



- Avoid ambiguous terms such as
  - “assists”,
  - “handles”,
  - “prepares”,
  - “supports”

Why are they ambiguous terms?

Why are the duties ambiguous?

### SECTION 3. DESCRIPTION OF DUTIES

List the major duties of the position. State the percentage of time for each duty. Mark “N” for new duties, “R” for revised duties or “NC” for no change in duties. Indicate whether the duty is an “Essential” (E) or “Non-Essential” (NE) function.

% of Time	N/R/NC	E/NE	DUTIES
35%			I. Program Support
	N	E	a.) Assists the program.

Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit “Enter”.

**This is where you’ll put most of your effort when reviewing a PD. Avoid ambiguous words like assists, handles, prepares *without going into detail of how it occurs.***

# Section 3 - Duties



...cs  
 ...tion. State the percentage of tim.  
 ...dies or "NC" for no change in duties.  
 ...-Essential" (NE) function.

E	DUTIES
	<i>Table are needed, place cursor at end of a row (outside table) and</i>
	I. Program Support
E	a.) Assists the program.

- Avoid ambiguous terms such as
  - “assists”,
  - “handles”,
  - “prepares”,
  - “supports”
- Why are they ambiguous terms?
- Why are the duties ambiguous?
- Because they don’t answer the 5 W’s

1. Who
2. What
3. Where
4. Why
5. How

You may be asking why do you need to avoid those types of words? Because, when you review the duties, you should be able to answer the basic questions: Who, what, where, why, and how. An ambiguous term like “assists the program” doesn’t answer the who, what, where, why, and how questions.

# Section 3 - Duties



## SECTION 3. DESCRIPTION OF DUTIES

List the major duties of the position. State the percentage of time for each duty. Mark "N" for new duties, "R" for revised duties or "NC" for no change in duties. Indicate whether the duty is an "Essential" (E) or "Non-Essential" (NE) function.

- Avoid ambiguous terms such as
  - "assists",
  - "handles",
  - "prepares",
  - "supports"

% of Time	N/R/NC	E/NE	DUTIES
35%			I. Program Support
	N	E	a.) Assists the program by scheduling meetings, preparing copies of presentations, taking meeting notes, making travel arrangements.

Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter"

**Without a further explanation of how it occurs.**

What's different?

You want to make sure simple statements are explained with **"by"** to define how the duty is performed and its purpose.

**Here's an example where the "assists the program" statement has been expanded so now it's giving you some information as to HOW it's assisting the program.**

**Does this help with defining the duty?**

- **What's this duty doing? It's assisting**
- **Who is it assisting? The program**
- **How is it assisting the program? By scheduling meetings, preparing copies, etc.**

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- Other things to avoid on PDs.
  - Don't copy/paste from the class specs
    - Broad examples of outcomes typically found within the classification.
    - Doesn't answer specifics of how the position accomplishes the work.

% of Time	N/R/NC	E/NE	DUTIES
35%			I. Program Support
	N	E	a.) Recommend and plan actions to bring about compliance with regulations and program goals.
			b.) Assist agency management by monitoring and tracking program and operational data.

**Reminder, don't cut and paste directly from the class specs. The class spec duties are usually written as outcomes and they're not duties tailored to the specific job you are talking about.**

**Here are two examples of class spec duties – they don't speak to this job specifically. They don't really answer the 5 W's.**

**They aren't talking about duties, they're broad examples of the type of work that is found within this classification. These class spec "duties" aren't focused to the specific job you're talking about on the PD.**

**Remember, when you review the duties, you should be able to answer the basic questions: Who, what, when, where, why, and how.**

# Section 3 - Duties



- Other things to avoid on PDs.
  - Don't copy/paste from the class specs
    - Broad examples of outcomes typically found within the classification.
    - Doesn't answer specifics of how the position accomplishes the work.
- How does the position assist management by monitoring and tracking data?
- Why?
- For what purpose?
- What's the expectation or goal of this duty?

### SECTION 3. DESCRIPTION OF DUTIES

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% of Time	N/R/NC	E/NE	DUTIES
35%			I. Program Support
	N	E	a.) Recommend and plan actions to bring about compliance with regulations and program goals.
	N	E	b.) Assist agency management by monitoring and tracking program and operational data.

So, looking at this first copy/past example. The questions you should have:

- How does the position recommend and plan actions to bring about compliance?
- Why?
- For what purpose?
- What's the expectation or goal of this duty?

These are questions you should be asking and getting clarification on. You can't necessarily know this based on the PD alone, you might have to follow up with the manager or get a better understanding of the program through research, this is all related to the prep work that goes into what you do as part of reviewing the PD and getting your ducks lined up for the analysis.

# Section 3 - Duties



Better Example

- WHAT (is the duty)?
  - Assisting
- WHO (is it assisting)?
  - Agency management
- HOW?
  - By monitoring and tracking data
- WHY?
  - To ensure program goals and metrics are met.

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% of Time	N/R/NC	E/NE	DUTIES
35%			I. Program Support
	N	E	a.) Recommend and plan actions to bring about compliance with regulations and program goals.
	N	E	b.) Assist agency management by monitoring and tracking program and operational data.

To ensure program goals are met.

When you're looking at these duties on PDs, you need to be able to understand what the purpose of the duty is, why the position is doing it, how it's doing it, who it's doing it for, etc. that will help you to have an understanding of that duty.

And when you can do that for all the duties, you'll understand the overall picture of the position and duties. These should all tie into the position's purpose as well. The purpose shouldn't be saying the position is one thing and the duties are saying another. It should all flow together.

# Section 3 - Duties



## SECTION 3. DESCRIPTION OF DUTIES

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% of Time	N/R/NC	E/NE	DUTIES
35%			I. Program Support
	N	E	a.) Responsible for interpretation of laws, rules, policies, and procedures and applying those interpretations to specific situations, some of which may be nonroutine.

- Common Administrative Specialist 2 duty.
- Not a duty, this is an outcome of a duty.

Here's a common AS2 duty that everyone has probably seen on almost every AS2 PD in the duties section.

The interpretation of laws, rules, policies, etc. and then applying those interpretations to non-routine situations. This is not a duty, it's a by-product of a duty. It's the result that happens in the performance of the actual duty.

You're inevitably going to see these types of duties on PDs, this is where you need to meet with the manager for clarification. What is the position doing that it needs to interpret laws, rules, policies, etc.? Why? Is it truly *interpretation* or is it *explaining* rules and policies to people?

# Section 3 - Duties



## SECTION 3. DESCRIPTION OF DUTIES

List the major duties of the position. State the percentage of time for each duty. Mark "N" for new duties, "R" for revised duties or "NC" for no change in duties. Indicate whether the duty is an "Essential" (E) or "Non-Essential" (NE) function.

- Ask yourself how this duty is being accomplished.
- Can you explain it or give examples?
- Keep it simple.
- Use plain language (no jargon).

% of Time	N/R/NC	E/NE	DUTIES
35%			I. Operational Support
	N	E	a.) Provides consultative advice to agency management on the programmatic aspects of operations based on client-based feedback functionalities.
	N	E	b.) Conceptualizes principle-centered action items to drive policy across multiple programs and external partners.
	N	E	c.) Analyze processes and facilitates meetings with cross-functional and interdisciplinary teams to identify organizational improvements.
	N	E	d.) Function independently while making appropriate decisions when necessary, using available information.

Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".

You're going to find duties that are either vague, written to sound like they're high-level and important work, or class spec duties that have been rewritten in a different way or simply cut and pasted from the class specs.

Ask yourself, can you explain how this duty is being performed? If not, you need clarification from the manager.

For example, "Analyze processes and facilitate meetings with cross-functional and interdisciplinary teams to identify organizational improvements." This sounds a lot like the OPA3 class spec duty "Lead and facilitate planning meetings with cross-functional and interdisciplinary teams to arrive at organizational improvements". So, it was a copy and paste of a class spec slightly rewritten.

As for, "Function independently while making appropriate decisions when necessary, using available information." This isn't a duty, it's not something you can do. It's a behavior or an ability. *This doesn't belong in the Section 3 - Duties of the PD.*

Be sure when you're reading the duties, you understand what they're doing and can explain them. If you can, you have a good idea of what that duty is. If not, it's not clear and needs to be explained or potentially rewritten. Remember, using plain language and avoiding jargon will help you get to a strong, well written duty that is understandable.



## Section 4 – Working Conditions



### SECTION 4. WORKING CONDITIONS

Describe any on-going working conditions. Include any physical, sensory, and environmental demands. State the frequency of exposure to these conditions.



- Classification wise, not much impact. But a thorough review of this section is hugely important.
- Importance. It may have an impact for FLSA designation, can't be in a white color job when you are working outside 100% of the time.
- Great example, but it does have a huge impact for ADA, WC, return from medical leave, issues in doing the job.

**This section should cover any physical, sensory, and environmental demands, including the frequency of exposure to these conditions.**

**This section has potential impact on the FLSA status. For example, if you're claiming an office job is FLSA exempt-administrative, yet this section says it's outside doing manual labor, that's not going to support the non-manual office work.**

**This section is very important, it may impact ADA and Workers' Comp, and may affect any return-to-work considerations. Be sure you look at this closely and ensure it supports the rest of the document.**

# Section 5 - Guidelines



## SECTION 5. GUIDELINES

a. List any established guidelines used in this position, such as state or federal laws or regulations, policies, manuals, or desk procedures.

■

b. How are these guidelines used?

■

- This section should support level of classification and FLSA.
- Listing any established guidelines used by the position to do the job.
  - State
  - Federal
  - Policies
  - Manuals
  - Desk Procedures

**List any guidelines, laws, regulations, ORSs, policies, procedures, etc. used to do the job and how they're used. This may have an impact on the classification and FLSA, so make this part of your PD review process to make sure it makes sense and aligns with the duties.**

# Section 6 – Working Contacts



## SECTION 6. WORK CONTACTS

With whom, outside of co-workers in this work unit, must the employee in this position regularly come in contact?

Who Contacted	How	Purpose	How Often?
<i>Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".</i>			

- People the position must be in contact with on a regular basis.
- How contact is made.
- Reason for the contact.
- How often the contact is made.

List individuals inside and outside of the agency this position has contact with, not including coworkers in the work unit. How they contact them, for what reason, and how often.

# Section 7 – Decision Making



## SECTION 7. POSITION RELATED DECISION MAKING

Describe the typical decisions of this position. Explain the direct effect of these decisions.

Decide on professional classification and compensation issues that affect the state's classification and compensation plans, agency organization and the cost of positions to state government. Effectively recommends to decision-makers on system or policy issues that affect the overall operation of the State's classification and compensation system. Decide classification actions that alter State of Oregon employee's compensation.

The ability to influence agency staff in classification and compensation issues impact the quality, consistency and accuracy of the state enterprise-wide classification and compensation system.

- This should match the level of responsibility and authority seen throughout the rest of the PD (purpose, duties).
- **Fun Fact:** the phrase "independent judgment" actually comes from the FLSA Administrative exemption which states that an employee's primary duty requires the exercise of discretion and independent judgment with respect to matters of significance.

**This is a really important section that often gets overlooked. This should go into detail about the level and scope of the position's decisions, who they impact, and how they impact them.**

**This section determines if the position is doing OPA3 or OS1 level work, or if it's MMN or not.**

**Also, a lot of times managers will use the term, "uses independent judgement..." almost everyone uses judgement. So, in and of itself "independent judgement" does not elevate a position into a higher-level classification. The point being, everyone uses independent judgment to a greater and lesser degree.**

**Conversely, high level positions should be showing decision making that has broad impact and scope.**

# Section 7 – Decision Making



## SECTION 7. POSITION RELATED DECISION MAKING

**Describe the typical decisions of this position. Explain the direct effect of these decisions.**

Decide on professional classification and compensation issues that affect the state's classification and compensation plans, agency organization and the cost of positions to state government. Effectively recommends to decision-makers on system or policy issues that affect the overall operation of the State's classification and compensation system. Decide classification actions that alter State of Oregon employee's compensation.

The ability to influence agency staff in classification and compensation issues impact the quality, consistency and accuracy of the state enterprise-wide classification and compensation system.

- Make sure it includes the direct effect of the decisions.

**When you're looking at Section 7 - Decision Making, the section includes both the decisions the position is responsible for and the direct effect they have. This should explain the ramifications of their decisions and how those decisions have impact. The higher the level of authority and scope of the position, the higher the decision making should be.**

**This could be both positive or negative impact. For example, a negative impact could be the agency's ability to continue to receive federal funding for a specific program or grant.**

**This section should not include duties, the position's purpose, reporting structure, etc.**

# Section 8 & 9



## SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review

Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".

## SECTION 9. OVERSIGHT FUNCTIONS THIS SECTION IS FOR SUPERVISORY POSITIONS ONLY

- a. How many employees are directly supervised by this position?  \_\_\_\_\_  
 How many employees are supervised through a subordinate supervisor?  \_\_\_\_\_
- b. Which of the following activities does this position do?
- |  |   |
|--|---|
| <input type="checkbox"/> Plan work               | <input type="checkbox"/> Coordinates schedules                    |
| <input type="checkbox"/> Assigns work            | <input type="checkbox"/> Hires and discharges                     |
| <input type="checkbox"/> Approves work           | <input type="checkbox"/> Recommends hiring                        |
| <input type="checkbox"/> Responds to grievances  | <input type="checkbox"/> Gives input for performance evaluations  |
| <input type="checkbox"/> Disciplines and rewards | <input type="checkbox"/> Prepares & signs performance evaluations |

- Review of work should match the level of the position.
- Be sure this portion accurately reflects the reporting structure.
- Oversight Functions are for supervisory and manager positions that oversee staff.
- Should match with the org chart.
- Don't use this for Leadwork or WOC duties.

**For Section 8 – This should be in sync with the rest of the PD. An OPA3 that has their work reviewed daily by their supervisor or an OS2 who is only reviewed annually doesn't make sense.**

**When you're reviewing the PD, the level of responsibility, the classification, the duties, the purpose, should all match up with this section as well.**

# Section 10, 11, & 12



## SECTION 10. ADDITIONAL POSITION-RELATED INFORMATION

ADDITIONAL REQUIREMENTS: List any knowledge and skills needed at time of hire that are not already required in the classification specification:

■

BUDGET AUTHORITY: If this position has authority to commit agency operating money, indicate the following:

Operating Area	Biennial Amount (\$00000.00)	Fund Type

Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".

## SECTION 11. ORGANIZATIONAL CHART

Attach a current organizational chart. Be sure the following information is shown on the chart for each position: classification title, classification number, salary range, employee name and position number.

## SECTION 12. SIGNATURES

\_\_\_\_\_  
Employee Signature                      Date                      Supervisor Signature                      Date

_____ Appointing Authority Signature	_____ Date
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→ A PD is not officially finalized without the Appointing Authority Signature.

**Finalized PDs must have the Appointing Authority Signature, ON the Appointing Authority signature line. If the position's supervisor is also the appointing authority, have them sign it in the appointing authority line so it's clear an appointing authority has signed it. The agency and DAS CnC might not be the only ones who end up reviewing the PD down the line, so make it easy and eliminate any confusion by just getting it signed in the right spot to begin with.**

# AND WE'RE DONE!!



## Contact and Resource information:

- Email – [CHRO.CnC@das.oregon.gov](mailto:CHRO.CnC@das.oregon.gov)
- DAS CnC Homepage – <https://www.oregon.gov/das/hr/pages/cc.aspx>