



WRITING A POSITION DESCRIPTION

Position descriptions are essential for:

- Organizing work units
- Hiring
- Training and coaching
- Appraising performance
- Reclassification
- Compensation

Following these steps will help ensure consistent and useful descriptions.

1. Provide an overview of unit program
2. Identify the major job functions
3. Create a title heading
4. Determine the qualifications
5. Determine physical and environmental requirements
6. Add appropriate disclaimer statements

Introduction

Since work at the University tends to change over time, position descriptions should be reviewed periodically (for example, during annual performance reviews). A useful tool for developing a greater understanding of an employee's current job duties is the Position Description Template Form, which allows the employee the opportunity to capture what it is that they do day to day. Such information may or may not match completely with the position description on file, but its essential functions and majority of work should be a close fit.

Position descriptions should reflect a consensus between the supervisor and the employee. If consensus is not possible, however, the supervisor's decision is final.

Position descriptions are an essential management tool. When filling vacancies, they are used for:

- Defining job duties and required (minimum) and preferred (selection criteria) qualifications
- Defining essential functions of the job for ADA purposes
- Creating interview questions
- Discussing work expectations with applicants
- Classifying positions for posting (decision made by OHR Compensation)

For existing positions, position descriptions are tools for:

- Discussing work expectations with employees
- Writing performance standards
- Evaluating employee performance
- Reclassifying positions (decision made by OHR Compensation)

Steps in Writing a Position Description

Once you have thought through the needs of your unit and how the position fits into the mission, you are ready to create a position description. The steps below will help:

1. Introductory Information

Describe the Unit and/or Program

What is the work of the unit? Describe the unit and/or program, its purpose and how it fits in to the University's organization. Information about the unit and/or the program is helpful in connecting the overall objectives for the position with the mission of the unit.

Provide a Work Summary

How does this position support the work of the unit? Describe the overall objectives for the position, and then use a few sentences to describe its main responsibilities.

2. Identify the major job functions

List the tasks that will be assigned to the position. Group those that are related.

Determine a heading that starts with an action verb for each grouping. The headings are the major work functions of the position. Most positions will have four to six major function areas.

Order the Major Function Areas by Importance

This will help determine which major function areas are essential to the job.

Determine the Percent of Time Spent on Each Major Function

Determine the percentage of time typically spent on each major function area and list it on the description.

Determine Essential vs. Non-Essential Functions of the Position

To comply with the Americans with Disabilities Act Amendments Act of 2008 (ADAAA), the essential functions of the position must be determined. Essential functions are the major job responsibilities that an employee must be able to perform, with or without reasonable accommodation.

Factors to consider in determining whether or not a function is essential:

- Does the job exist to perform this function?
- How much time is spent performing this function?
- What critical skills, experience, training, education, and/or license are needed?
- What equipment is used to do the function?
- How frequently is the equipment used?
- What are the physical and mental elements of this function?
- Can other co-workers do this function if necessary?
- Would taking the function from the job significantly change the job?
- Would there be significant consequences if the function were not performed?

Essential and non-essential functions should be differentiated in the position description. Non-essential functions are important to the position; however, could be redesigned or reassigned to other employees, if necessary.

3. Create a Title Heading

- Write a title heading, including:
- Date of description/revision
- Job code and title
- Position/working title (if applicable)
- Unit and location where duties will be performed
- Name and title of person this position reports to
- Length of probationary period
- Percent time of appointment
- Term and type of appointment
- Any other identifying specifications particular to the position; i.e. work hours, work days

4. Determine the Qualifications

Required (Minimum) Qualifications:

These describe the minimum level of qualifications needed for an individual to perform the essential functions of the position. They include education, licensure or certification, and any measurable and job-related experience. Required qualifications are used by OHR employment consultants to screen applications for vacant positions.

The [Job Classification Search](#) on MyU provides required qualifications for each University job code. (On the Job Classification Search screen, enter the search parameters—for example, by clicking the magnifying glass icon in the Job Code or Job Family field and making a selection)—then click Search. From the search results, select the position, then click Run Report to view the qualifications.) Additional qualifications can be included as long as they are directly related to the job functions. Your unit’s employment consultant can assist you in determining, what, if any, additional required qualifications are needed.

List qualifications needed to perform the work. Guidelines to consider include:

- Never exceed or ask for less than the required qualifications listed in the generic job specification for the job code being posted.
- All required qualifications must be measurable and job related; do not include language such as “ability to” or words such as “excellent” or “advanced level” because these cannot be measured; use phrases such as “demonstrated/documentated experience” instead.
- When appropriate, include training/education equivalencies for the experience requirement.
- University specific experience (i.e. EFS, UMCal, PeopleSoft) may be included in the required qualifications if relevant to the essential job functions, but doing so impacts the applicant pool. Consultation is a must with these requirements.
- A four year (or greater) college degree cannot be a required qualification for bargaining unit vacancies and cannot be a selection criteria for AFSCME Clerical or Teamster vacancies.

Be prepared to consider the following when developing the required qualifications:

- Is a degree/education in a specific field of study necessary or would general education satisfy the education requirement? Would work experience substitute for the degree?
- Do you need to require specific software or would general exposure to or experience with computers be sufficient?

Preferred Qualifications: (Selection Criteria)

Additional measurable and job-related levels of experience, knowledge, and/or skill the ideal employee would have. The preferred qualifications are not used to screen applications within the Office of Human Resources, but are used to assist the hiring authority further assess applicants for a vacancy, typically through interviews. Remember that such criteria must not exceed the qualifications listed in the generic job code being posted and must be applied equally to all candidates.

Depending on the way required and preferred qualifications are designed, the pool of qualified applicants may be affected. Your unit's employment consultant is available to assist you in determining what is necessary to perform the essential functions of the job.

5. Determine Physical and Environmental Requirements

The physical and/or environmental requirements of the position may be evident in the tasks listed in the job description or by the required qualifications. When considering physical requirements, remember that long periods at a computer terminal or standing at a service counter may be physically demanding. It is also important to list any unusual environmental conditions, such as loud noises, cold temperatures, confined spaces, dust, or fumes.

Focus on the end result of the task, not how to achieve it. For example, "Must be able to move 25-pound boxes 3 times per minute for 2-3 hours daily", preferable to "Must be able to lift 25 pounds".

6. Disclaimer Statement

Job descriptions typically change over time as unit requirements and employee skill levels change. Supervisors may revise and/or add duties to reflect these changes. To reflect this, the following statement should be included in all job descriptions: **"The Employer retains the right to change or assign other duties to this position."**

Example

Finance Professional 2- 8223P2

Date:	January 2014
Classification & Title:	8223P2, Finance Professional 2
Working Title:	None
Percent Time:	100%
Work Schedule/Hours:	Monday– Friday, 8:00am– 4:30pm
Term:	A – 12 month appt.
Type:	Continuing
College/ Admin Unit:	CEHD
Campus Location:	Minneapolis

POSITION RESPONSIBILITIES

Financial Management and Accounting (65%)

- Ensure accurate and appropriate costing of personnel expenditures through payroll reconciliation and auditing; identify and process corrections
- Coordinate effort certification processes, ensuring compliance and deadlines are met
- Review, monitor, and reconcile financial activity for sponsored and non-sponsored funds, internal and external sales revenue, and endowment funds, to ensure appropriate fund usage; initiate and process journal entry corrections
- Approve financial expenditures to ensure fiscal compliance related to procurement card activity, cash advance, employee travel and expense reimbursement; partner with document preparers/processors and certified approver to ensure accuracy and adherence to policy and procedure
- Coordinate the course fee review, reconciliation, entry, and approval workflow
- Coordinate with external/internal sales business manager in developing business plans, rates, and contracts; facilitate the annual reporting for accounts receivable and external/internal sales
- Coordinate the fiscal management and monitoring of multiple grants associated with multiple PIs; ensure compliance of applicable policies and regulations
- Partner with Sponsored Projects Administration (SPA), and Sponsored Financial Reporting (SFR), and external sponsors to manage sub-awards, reconcile/resolve inconsistencies, and close-out awards

POSITION OVERVIEW

The College of Education and Human Development (CE+HD), Finance Professional position is part of a college-wide team consisting of 16 professional staff and three student employees, that make-up the Financial Services Office (FSO). CE+HD is organized into seven academic departments, nine college-wide centers, and 16 administrative and support units.

This position, along with partners within assigned units, across the college and University, fosters an engaging and professional environment committed to respect, inclusivity, continuous improvement, and teamwork. The position works within policies and procedures, related to sponsored/grants and non-sponsored accounting as well as pre and post-award coordination to include, proposal development, fiscal management, reconciliation, audit, fund accounting, budget development and monitoring, reporting and analysis, and ensure compliance for assigned academic, research, programmatic, and/or administrative units.

CEHD and the University of Minnesota provides equal access to and opportunity in its programs, facilities, and employment without regard to race, color, creed, religion, national origin, gender, age, marital status, disability, public assistance status, veteran status, sexual orientation, gender identity, or gender expression.

- Ensure consistent and informative communication through routine interactions with PIs and project staff throughout the lifecycle of grants

Reporting and Analysis (20%):

- Develop routine, customized, and ad hoc financial reporting for assigned accounts and PIs; gathering data from a variety of sources
- Analyze fiscal data for anomalies; investigate anomalies and recommend solutions
- Develop and present fiscal trending and projections data that inform stakeholders

Budget (10%):

- Prepare budgets for proposals and assigned projects/grants
- Coordinate the development of all funds annual budgets
- Ensuring budget deadlines are met and fiscal year-end close-out.
- Identify gaps in revenue and/or expense.

Service Delivery and Professional Development (5%):

- Ensure optimal service levels for assigned units through the FSO Service Level Agreement and related memorandum
- Remain current and participate in continuing education and training opportunities related to University policy and best practices
- Participate in department, college, and University events, meetings, projects and initiatives

REQUIRED QUALIFICATIONS:

- BA/BS with at least 2 years of experience or a combination of related education and work experience to equal 6 years.

PREFERRED QUALIFICATIONS:

- BA/BS degree related accounting, business or public administration, finance, grants management, or economics
- Experience working in a higher education research environment; familiarity with University of Minnesota policies and procedures.
- Fiscal experience including accounting, budget development and monitoring, fund accounting, and auditing.
- Experience with or coursework related to the grant proposal development process and managing grants/sponsored awards/projects.
- Familiarity with Federal granting agencies such as USDE, NIH, DOL, DHHS.
- Experience with the financial management, oversight, and monitoring complex budgets and contracts.
- Advanced computer skills including spreadsheet development and maintenance using -Excel and web database reporting.
- Experience managing and prioritizing multiple tasks and work both independently and as part of a team.
- Experience/working knowledge of University of Minnesota Enterprise Financial System (EFS/PeopleSoft), UM Reports, ImageNow, Human Resources Management System (HRMS), Effort Certification Reporting Tool (ECRT, sponsor-funded payroll), Donor -Management System (DMS, scholarship and endowment database).
- Certified approver (UMN internal applicants, passed exam 1 and 2); expectation to pass both within 12 months of employment