

THE UNIVERSITY OF WINNIPEG

GUIDE TO WRITING POSITION DESCRIPTIONS

What is a Position Description?

A narrative document of factual information describing the nature, scope and responsibilities of a position and the environment in which it operates

The position description summarizes:

- the organizational structure in which the position operates
- all of the responsibilities of a position and provides information on decision making
- the type of supervision received and exercised
- any working conditions under which the work is performed
- the minimum education and experience required to perform the work

What are the uses of Position Descriptions?

- used to place a value on positions through external salary surveys and internal comparison reviews to determine equitable classifications and pay levels throughout the University
- may also be used in organizational planning, career planning, identifying training and development needs, and in setting and reviewing individual goals and objectives for performance evaluation purposes
- a valuable aid to employees to communicate and clarify roles and responsibilities

General Instructions

Before writing a position description, review each section of the position description form and use the Glossary of Position Description Verbs at the end of this document to assist you in writing responsibility statements.

Some ***important*** considerations before writing a position description are:

- focus on position requirements, not the person performing the position
- describe the position as it is now, not how it may be in the future
- describe only the ongoing and/or continuing responsibilities of the position
- try to describe the work of the position for someone not familiar with the work
- use plain language that is gender and culturally neutral and commonly understood
- make a list of duties, group duties into similar work lists (e.g., budget related duty list, supervisory related duty list, operational related duty list, etc.) and then write bullet form broad responsibility statements covering each work group list that describe WHAT (using an action verb) work is done, HOW (by...) the work is done, and WHY (to accomplish what) the work is done
- remember, normally a position has no more than 10 broad responsibility statements

- use common action verbs (See Glossary of Position Description Verbs) to begin each broad responsibility statement
- do not understate or overstate work requirements
- remember to add a generic statement at the end of the responsibilities in Section 4. - "Performs other related duties as required or assigned" as a catch-all for minor differences that are not stated
- avoid using technical terms, acronyms or abbreviations unless they are clearly explained

Position Description Form

The position description form contains the following sections:

- Section 1. General Information and Signatures**
- Section 2. Department/Area and Position Summary**
- Section 3. Major Areas of Responsibility**
- Section 4. Major Areas of Responsibility and Activities**
- Section 5. Independent Action/Decision Making**
- Section 6. Purposes of Contacts**
- Section 7. Direction (Received and Provided)**
- Section 8. Working Conditions**
- Section 9. Minimum Qualifications Required**

Section 1. General Information and Signatures

- identifies the position within the University
- identifies the supervisor of the position (and incumbent if known)
- ensures that the position description has been authorized by the appropriate levels

Section 2. Department/Area Summary

- a brief summary of the department or unit in which the position is located
- provides information at a glance on how the position fits into the department in which it works
- indicates the position this position reports to and which positions report to this position
- Include any numbers that would show size and scope of an area (e.g. Budget size in dollars, staff size in numbers, number of students in programs, etc.)
- provides at a glance in 2-3 sentences, the type and the level of work performed

Section 3. Major Areas of Responsibility and Percentages

- list the broad responsibility statements and the requisite amount of time (**projected over an annual period**) spent performing each responsibility
- try to describe each broad responsibility statement as a category (e.g. Secretarial Responsibilities, Clerical Responsibilities, Financial Responsibilities, etc.)

The following table may be helpful in determining percentages of time involved:

1 day per week is 20%
 1/2 day per week is 10%
 1 day per month is 5%
 1 week per year is 2%

1 hour per day is 14%
 1/2 hour per day is 7%
 1 hour per week is 3%

Section 4. Major Areas of Responsibility and Activities

This is the **most important section of the position description** as it is where you describe how the Major Areas of Responsibility listed in Section 3. get accomplished. Use action verbs (see glossary at end of this document) to describe what is done and explain how and why it is done. Try to be as succinct but complete as possible.

| <i>HOW TO WRITE A BROAD RESPONSIBILITY STATEMENT</i> | | | |
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| <i>Sample Statement for a Purchasing Position</i> | | | |
| <i>The Four Basic Requirements</i> | <i>What To Do</i> | <i>A Typical Statement Broken Down</i> | <i>Notes and Suggestions</i> |
| <i>A. Start with a verb</i> | <i>Eliminate all unnecessary words by starting with an action verb.</i> | <i>Maintains...</i> | <i>Use a verb to appropriately describe the level of responsibility associated with the work.</i> |
| <i>B. Tell What</i> | <i>Tell "what" is done. (This is an important part of the sentence. In general terms, it describes the nature of the responsibility.)</i> | <i>frequent contact with existing or potential suppliers...</i> | <i>If the sentence ended here the information would be incomplete and would not convey the associated level of responsibility.</i> |
| <i>C. Tell How</i> | <i>Tell "how" the work is done. (This conveys a level of responsibility).</i> | <i>by telephone, letters and site visits...</i> | <i>The addition of "how" an activity is carried out defines the extent of the individual's involvement in the activity.</i> |
| <i>D. Tell Why</i> | <i>Tell "why" it is done. (This further qualifies the activity by showing the relative importance of the activity).</i> | <i>to expedite the delivery of purchased material and stay informed of developments in the field of purchasing scientific equipment and supplies.</i> | <i>The addition of "why" an activity is done defines the objective for doing the work.</i> |

Section 5. Independent Action/Decision Making

This section is in two parts:

- first, list any significant action or decisions that can be determined independently, without relying on others (i.e. the buck stops here)
- second, list actions or decisions that require approval or consent from others (i.e. the buck stops somewhere else)

Examples of the most important decisions the employee is expected to make independently:

- makes decisions regarding how to interpret and apply academic and administrative policies

- makes decisions to approved budgeted expenses
- makes decisions on what capital equipment to recommend for purchase
- makes decisions to interview and hire staff, evaluate staff performance, initiate corrective action

Examples of decisions the incumbent would refer to his/her supervisor:

- exceptions to academic and administrative policies
- approval of non budgeted expenses
- approval of capital purchases
- grievances at step 2, serious staff performance issues, termination of employment

Section 6. Purposes of Contacts

- explains the purpose(s) of contacting someone inside and outside the university.
- examples include: to share information, to persuade, to negotiate, for repairs, etc.

Section 7. Direction

A. The first section is for direction provided to this position. Simply choose the best fit. In choosing the best fit, consider:

- how often is work reviewed with the supervisor?
- is the incumbent expected to report on the details of what he/she is doing?
- how much and what type of advice or assistance is provided on how to accomplish tasks?
- is the position provided with general objectives which must be met with little or no assistance?
- are the results of the work always and/or rarely checked before they are approved?

B. The second section is for direction provided by this position to other positions:

- identifies the number of continuing full-time and part time positions for which the employee is the direct and formal supervisor including those positions reporting through subordinate supervisors for which the employee is responsible
- addresses other kinds of supervision which may be applicable for other types of employment relationships (e.g., for volunteers, grant funded employees, students, temporary hires, contracts)
- the nature of direction ranges from a low level of involvement: "participates in" or "recommends", to a medium level "makes decisions" or "carries out" to a high level "delegates" to others for periodic review

Section 8. Working Conditions

- indicates the conditions under which the work of the position is performed such as a requirement to lift heavy objects, to be subject to fumes, odours or inclement weather, attend to several stimuli at once, be on call and return to work outside normal working hours, a need to travel to perform work, etc.

Section 9. Minimum Qualifications Required

When completing this section, think of the requirements of the position and not an incumbent's personal qualifications, as if it was to be filled as a vacancy.

- limit qualifications that may be "preferred or assets" because they are not required to do the work
- formal qualifications, experience, and skills should be the minimum required and be directly related to the responsibilities to enable an employee to satisfactorily perform the work, common to other positions requiring characteristically similar work, defensible, and measurable through testing and/or interviewing
- include any special requirements such as access to a motor vehicle and valid driver's licence if appropriate
- ensure any unusual working conditions such as an ability to work flexible work hours involving some evening and weekend work, to be on call and able to return to work after normal working hours, travel, etc.
- avoid using technical terms, acronyms or abbreviations, unless these are clearly explained
- try rephrasing organization related qualifications and/or skills (e.g., experience in the use of the Datatel system rephrased to experience in the use of enterprise student information systems; experience in the use of Access for Windows, Excel, File maker rephrased to experience in the use of a variety of word-processing, database, and spreadsheet applications such as ...) to avoid limiting your pool of potentially qualified applicants that could easily adapt and learn UW specific tools

**Please contact Dianne Caldwell in Human Resources if you would like assistance.
All applicable signatures must be on the cover page before forwarding a hardcopy to Dianne
Caldwell in Human Resources.**

In addition, please e-mail an electronic copy to Dianne Caldwell

GLOSSARY OF POSITION DESCRIPTION VERBS

Using commonly understood verbs to describe position responsibilities minimizes misunderstandings or ambiguity.

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| ACCEPT: | To receive as true; to regard as proper, normal, inevitable. |
| ACKNOWLEDGE: | To recognize as true or pertinent; to admit obligation; to report receipt of (a letter, cheque, etc.). |
| ADAPT: | To suit or fit by modification. |
| ADJUST: | To bring to a more satisfactory state; to bring the parts of something to a true or more effective position. |
| ADMINISTER: | To direct the execution of affairs. |
| ADVISE: | To recommend a course of action; to offer an informed opinion based on specialized knowledge, with responsibility for some interpretation and/or decision-making. |
| ALTER: | To make different without changing into something else. |
| AMEND: | To change or modify for the better. |
| ANALYZE: | To study parts, elements, or factors of a situation or problem in detail to determine course of action, solution, or outcome; to examine critically for understanding the organization or nature of; e.g., analyzes malfunction of computing circuits. |
| ANSWER: | To speak or write in reply. |
| ANTICIPATE: | To foresee and deal with in advance. |
| APPLY: | To put to use for a purpose; to employ diligently or with close attention. |
| APPROVE: | To sanction officially; to accept as satisfactory; to exercise final authority with regard to commitment of resources. |
| ARRANGE: | To make an agreement with another or others; to prepare for an event; to put in proper order. |
| ARRANGE FOR: | To take appropriate measures to see whatever may be needed is available for use when needed. |
| ASSEMBLE: | To collect or gather together in a predetermined order from various sources. |
| ASSESS: | To determine value of; to evaluate. |
| ASSIGN: | To specify or designate tasks or duties to be performed by others. |
| ASSIST: | To help or aid others in the performance of work for which they have prime responsibility. |
| ASSUME: | To undertake; to take for granted. |
| ATTEND: | To be present. |
| AUTHORIZE: | To approve; to empower through vested authority; to grant permission for the conduct of an activity. |

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| BALANCE: | To compute the difference between the debits and credits of an account; to reconcile accounts. |
| BATCH: | To assemble into a group for one operation. |
| BUDGET: | To plan expenditures. |
| BUILD: | To construct. |
| CALCULATE: | To determine by mathematical processes - implies intricate processes compared to <u>compute</u> which implies simple arithmetical process and exact results; forecasts consequences or results, as in taking risks. |
| CERTIFY: | To confirm as accurate or true. |
| CHART: | To draw or plot data (as on a graph); to make a detailed plan. |
| CHECK: | To verify; to compare with a source. |
| CIRCULATE: | To pass from person to person or place to place. |
| CLARIFY: | To make easier to understand; to explain. |
| CLASSIFY: | To arrange or organize according to systematic groups, classes, or categories. |
| CODE: | To use symbols (letters or numbers) to represent words. |
| COLLABORATE: | To work jointly with; to cooperate with others having equal responsibility. |
| COLLATE: | To organize or assemble in a predetermined sequence. |
| COLLECT: | To gather. |
| COMMUNICATE: | To impart a verbal or written message; to transmit information. |
| COMPARE: | To examine for the purpose of discovering resemblances or differences. |
| COMPILE: | To put together information; to collect from other documents. |
| COMPOSE: | To make by putting parts together to create; to write (an original letter, report, instructions, etc.). |
| COMPUTE: | To determine or calculate mathematically; to count. |
| CONFIRM: | To give approval to; to assure the validity of. |
| CONSOLIDATE: | To bring together. |
| CONSTRUCT: | To make or form by combining parts; to draw with suitable instruments and under specified conditions. |
| CONSULT: | To seek advice of others; to give professional advice or services. |
| CONTACT: | To communicate with. |
| CONTRIBUTE: | To supply or give something; to submit for publication. |
| CONTROL: | To measure, interpret, and evaluate actions for conformance with plans or desired results; to regulate performance to ensure fulfillment of that which is prescribed. |

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| CONVERT: | To alter the physical or chemical nature of something; to alter for more effective utilization. |
| COORDINATE: | To regulate, adjust, or combine the actions of others to attain harmony. |
| COPY: | To duplicate an original. |
| CORRECT: | To make or set right; to alter or adjust to conform to a standard. |
| CORRESPOND: | To communicate with. |
| CONTINUING: | Refers to a position which, when filled, is expected to exist for at least three (3) months from the date it is filled and has no specified end date. |
| CREATE: | To bring into existence; to produce through imaginative skill; to design. |
| DEBUG: | To detect, locate, and remove mistakes from a routine of malfunctions from a computer. |
| DELEGATE: | To commission another to perform tasks or duties which may carry specific degrees of accountability and authority; to entrust to the care or management of another. |
| DELIVER: | To take to an intended destination. |
| DEMONSTRATE: | To illustrate and explain, especially with examples. |
| DESCRIBE: | To represent by a figure, model, or picture; to trace the outline of; to give an account of in words. |
| DESIGN: | To conceive, create, and execute according to plan. |
| DETERMINE: | To come to a decision as a result of investigation or reasoning; to fix conclusively or authoritatively. |
| DEVELOP: | To go through the process of evolving the specified action or plan. |
| DEVISE: | To form in the mind by new combinations or applications of ideas or principles; to invent. |
| DIRECT: | To guide work operations through the establishment of objectives, policies, rules, practices, methods, and standards; to give authoritative instructions. The one who directs often takes an active part in the performance of the activity. |
| DISSEMINATE: | To spread or disperse information or ideas. |
| DISTRIBUTE: | To deliver to proper destination; to divide; to apportion. |
| DRAFT: | To prepare papers or documents in preliminary form. |
| EDIT: | To revise and prepare material (written, film, tape, sound track) for publication or display. |
| ESTABLISH: | To bring into existence; to set up. |
| ESTIMATE: | To forecast future requirements; to calculate approximately. |
| EVALUATE: | To determine or fix the value of; to judge relative worth. |
| EXAMINE: | To inspect closely. |
| EXCHANGE: | To give or take one thing in return for another. |

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| EXPEDITE: | To accelerate the process or progress of. |
| FACILITATE: | To make easier. |
| FILE: | To arrange in a methodical manner; to rub smooth or cut away with a tool. |
| FINALIZE: | To put in finished form. |
| FOLLOW UP: | To pursue closely in order to check progress; to monitor. |
| FORECAST: | To estimate in advance; to predict realistically future events or possible results of actions. |
| FORMULATE: | To develop or devise; to reduce to, and express in, a systematic statement. |
| IDENTIFY: | To establish the identify of; to associate with some interest. |
| IMPLEMENT: | To carry out; to execute a plan or program; to put into practice. |
| IMPORT: | To bring from a foreign or external source. |
| INDICATE: | To show, demonstrate with precision. |
| INFORM: | To communicate information to; to make aware. |
| INITIATE: | To start; to introduce; to originate. |
| INSPECT: | To examine or determine; to critically analyze for suitability. |
| INSTALL: | To place in office; to establish in an indicated place, condition, or status; to set up for use in office. |
| INSTRUCT: | To teach; to coach; to communicate knowledge; to direct or order. |
| INTEGRATE: | To unify; to make whole by putting all parts or elements together. |
| INTERPRET: | To give the meaning of; to explain to others. |
| INTERVIEW: | To obtain facts or opinions through inquiry or examination or various sources. |
| INVENTORY: | To catalogue or to count and list. |
| INVESTIGATE: | To observe or study by close examination and systematic inquiry; to inquire into; to search in order to ascertain facts. |
| ITEMIZE: | To list; to write down in detail. |
| LEAD: | To guide or direct on a course or in the direction of; to channel; to direct the operations of. |
| LOAD: | To place in or on a means of conveyance; to increase the weight of by adding something heavy. |
| LOCATE: | To find, determine, or specify by means of searching, examining, or experimenting. (to seek and find.) |
| MAINTAIN: | To continue; carry on; or keep in an existing state. |
| MERGE: | To combine items from two or more similarly ordered sets into one set that is arranged in the same order. |

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| MODIFY: | To make less extreme; to limit or restrict the meaning of; to make minor changes in. |
| MONITOR: | To watch, observe; to check in order to discern deviations. |
| MOVE: | To go from one point to another; to begin operating or functioning or working in a usual way. |
| NEGOTIATE: | To confer with others with a view to reaching agreement and to come to terms subject to approval by final authorities for each side. |
| NOTIFY: | To make known . |
| OBSERVE: | To see, notice, or watch something or someone. |
| OBTAIN: | To acquire or gain possession of. |
| OPEN: | To make available for entry or passage; to make accessible; to expose to view; to disclose. |
| OPERATE: | To perform an activity or series of activities. |
| ORGANIZE: | To arrange; to systematize or methodize. |
| ORIGINATE: | To create; invent; to produce as new. |
| PARTICIPATE: | To take part in; to share in an action. |
| PERFORM: | To fulfill or carry out some action. |
| PLAN: | To devise or project the realization or achievement of a course of action. |
| POST: | To record information in ledgers or other forms from another source. |
| PRACTICE: | To perform or work at repeatedly in order to gain proficiency. |
| PREDICT: | To declare in advance; to foretell on the basis of observation, experience, or scientific reason. |
| PREPARE: | To make ready for a particular purpose. |
| PRESENT: | To introduce; to offer, to view. |
| PRESERVE: | To keep, guard, observe; to keep safe, protect; to keep free from decay; to maintain. |
| PREVENT: | To stop something from occurring; to take advance measures against. |
| PRICE: | To fix, to establish, or to find out the value of. |
| PROCEED: | To begin to carry out an action. |
| PROCESS: | To handle in accordance with a prescribed procedure. |
| PROCURE: | To obtain possession of; to bring about. |
| PRODUCE: | To grow; to make, bear, or yield something; to offer to view or notice; to exhibit. |
| PROGRAM: | To arrange or work out a sequence of operations to be performed. |
| PROPOSE: | To form or declare a plan or intention. |

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| PROVIDE: | To supply what is needed. |
| PULL: | To haul, tow; to remove, as in filing. |
| PURCHASE: | To buy or procure by committing organizational funds. |
| QUANTIFY: | To make explicit the logical amount of; to determine or express the amount of. |
| QUESTION: | To interrogate; to doubt; to dispute; to inquire. |
| RATE: | To assess the value of; to appraise; to arrange in sequence of rank. |
| READ: | To interpret; to scan; to study the movements of; to understand the meaning of. |
| RECEIVE: | To acquire, come into possession of. |
| RECOMMEND: | To advise or counsel a course of action; to offer or suggest for adoption. |
| RECONCILE: | To adjust; to restore to harmony; to make congruous. |
| RECONSTRUCT: | To rebuild; to reorganize or reestablish. |
| RECORD: | To register; to set down in writing. |
| RECTIFY: | To correct by calculation or adjustment; to remedy; to set right. |
| REDUCE: | To narrow down; to diminish in size or amount. |
| REFER: | To send or direct for aid, treatment, action, information, or decision; to direct attention; to make reference to. |
| REFINE: | To improve or perfect; to free from impurities. |
| REGISTER: | To enter in a record. |
| REMIT: | To send money in payment of; to submit or refer for consideration, judgement, decision, or action. |
| REPRESENT: | To act in the place of or for. |
| REPORT: | To give an account of; to furnish information or data. |
| RESEARCH: | To inquire specifically, using involved and critical investigations; to conduct investigation or experimentation aimed at the discovery and interpretation of facts. |
| RESPOND: | To make an answer; to show favorable reaction. |
| REVIEW: | To consider; to reexamine. |
| REVISE: | To rework in order to correct or improve; to make a new, improved, or up-to-date version. |
| ROUTE: | To forward; to schedule or dispatch. |
| SCAN: | To examine; to search a series of punched cards, tapes, or a memory bank to locate specific data (computer usage). |
| SCHEDULE: | To plan a timetable; to fix time. |
| SCREEN: | To examine in orderly fashion to determine suitability or acceptability. |

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| SEARCH: | To examine; to probe; to make a thorough examination or investigation of. |
| SECURE: | To gain possession of; to guarantee; to make safe. |
| SELECT: | To choose the best suited; to take as preference; to pick out. |
| SESSIONAL: | Refers to a position which, when filled, is expected to continue indefinitely, subject to seasonal lay-off. |
| SOLVE: | To find a solution for. |
| SORT: | To separate or arrange according to a scheme; to rank by kind, class, division, etc. |
| SPECIFY: | To state precisely in detail or to name explicitly. |
| STRUCTURE: | To give arrangement or form to; to arrange or organize. |
| STUDY: | To contemplate; to carefully examine or investigate; to deliberate. |
| SUBMIT: | To present data for the discretion or judgment of others. |
| SUMMARIZE: | To restate material (facts, figures, etc.) briefly. |
| SUPPLY: | To furnish something that is needed; to provide; to equip. |
| SURVEY: | To examine as to condition, situation, or value. |
| SYNTHESIZE: | To form new product or idea by combining different elements. |
| TABULATE: | To put in table form; to set up in columns, rows. |
| TEMPORARY: | Refers to a position which, when filled, is not expected to continue beyond three (3) months. |
| TERM: | Refers to a position which, when filled, is expected to exist beyond three (3) months but not beyond fifteen (15) months, including up to three (3) months of temporary status. |
| TEST: | To put to proof; to examine, observe, or evaluate critically. |
| TOTAL: | To add up; to compute. |
| TRACE: | To locate something by searching or researching evidence. |
| TRAIN: | To teach, demonstrate, or guide others in order to bring up to a predetermined standard. |
| TRANSCRIBE: | To transfer data from one form of record to another or from one method of preparation to another, without changing the nature of data. |
| TRANSLATE: | To turn into one's own or another language. |
| TRANSMIT: | To transfer or send from one person or place to another; to send out a signal either by radio waves or over a wire. |
| TURN: | To make rotate or revolve; to cause to move around so as to effect a desired end (as locking, opening, shutting); to reverse the sides or surfaces of. |
| TYPE: | To write using a typewriter/keyboard. |

UPDATE: To bring current.

UTILIZE: To make use of.

VERIFY: To confirm or establish authenticity; to substantiate; to prove; to check the accuracy of.

WEIGH: To ascertain the heaviness of; to consider carefully.

WRITE: To set down letters, words, sentences, or figures on paper or other suitable material; to author; to draft.