

Guide to Writing Out-of-Scope Position Descriptions



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Organizations

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PART A

GUIDE TO WRITING POSITION DESCRIPTIONS

THE POSITION DESCRIPTION

A good position description permits a clear understanding of the scope and responsibility of a job.

The description should define the objectives or purpose of the job, rather than listing a series of duties. These objectives should be highlighted against the environment in which the job exists and from which come the challenges.

There are other benefits that a good description can provide:

- the description clarifies what it is the position is designed to accomplish;
- it is a basis of agreement between the incumbent and his/her supervisor about the job's end results;
- it is a means of communication for improved work planning and feedback; and
- it gives to a reader, who may or may not be familiar with the job, a clear and understandable picture of the job's nature and scope.

A well-written job description will undoubtedly provide the incumbent with a fresh appreciation of the role in the achievement of the organization's objectives.

After you assemble the information and record it in the form requested, there will be a clear and concise statement about the job that communicates both the scope and character of what is done and its effect on the objectives of the organization.

One important aspect should be understood is that **it is the job that is being described NOT** the person. The description should focus on what is **expected** from the job.

**“SAMPLE”
Organization Name
Position Description**

Position Title:	Division:
Location:	Department:
Date:	Incumbent:

PRIMARY FOCUS

Accountable for achieving the manufacturing schedules in all three plants in adherence to established quality standards and within agreed-upon cost levels. The incumbent is also accountable for the effective operation of the Research Centre and the provision of industrial and design engineering services for the Company.

JOB CONTEXT

The Vice-President’s major challenges are related to both present operations and future planning and require close liaison with other members of management, particularly marketing management personnel and U.S. corporate manufacturing and engineering executives. The incumbent’s major problem areas are quality and cost control and labour relations. The control of labour cost is very important since labour constitutes, in total, about a third of total production expenditures.

The sales orientation of the Company imposes a special demand on the Vice-President to obtain maximum productivity in the plants yet with appropriate regard for customer needs since approximately 75% of production is for existing customer orders and just 25% for inventory. The available engineering and technical expertise in the Company is in short supply and places a special pressure on the Vice-President to ensure that it is being used for maximum benefit.

SPECIFIC ACCOUNTABILITIES

- Ensure adequate and orderly growth of manufacturing facilities to meet domestic and export requirements through development and implementation of long-range facilities plans.
- Ensure the delivery of all products in accordance with quality and cost standards on schedule through the effective direction of all plants.
- Ensure the latest engineering techniques and developments are incorporated into manufacturing schedules as soon as they are economically practical.
- Contribute to future corporate product development through the effective direction and motivation of Research Centre personnel.

Organization Structure ((Org Chart attached)

Reports to: President
Direct Reports: Director of Engineering,
Director of Research and Development

DIMENSIONS

Total Organization Budget	
Total Organization Payroll	
Total Organization Employees	
Total Organization FTE’s	

	FTE’s	Budget
VP or equivalent		
Immediate supervisor of this position		
This position		

WORKING CONDITIONS

Physical Effort- The job essentially sedentary although travel across the country and to the U.S.A. occurs, on average, a couple of times a month and involves hours of sitting in cramped airplanes and/or long drives by car.

Physical Environment- Work is generally conducted in a pleasant office environment. However, long distance travel by care and plane occurs a couple of times monthly and there are many other frequent shorter trips by car, so exposure to weather conditions and road hazards is unavoidable.

Sensory Attention- The job requires detailed review of written documents covering a variety of subjects relevant to Manufacturing, Engineering, and Research issues and results; a number of these can be very technical (e.g. engineering drawings), requiring a strong focus on details. Much of the time is spent in meetings with individuals or groups, including customers, where focused listening is required.

Mental Stress- There is continuous pressure from various sources for results. The pressure becomes pronounced on occasion and may be accompanied by confrontation or other unpleasant interactions, especially with union representatives and sometimes other staff and occasionally with customers. There is a regular demand for decisions and actions, many of which are taken with limited information and unpredictable outcomes.

APPROVAL SIGNATURES;

Incumbent _____
Date _____
Supervisor _____
Date _____

STEP ONE

GATHERING THE DATA

- Begin by gathering all of the information that is needed. You may wish to complete the Position Description Questionnaire outlined in **Part B**, which is designed to assist you in gathering information necessary to complete a comprehensive job description **or** consider the questions below:

NOTE: Some question may not be relevant. Don't worry about it, the questions are simply a guide to help you dig out the data that you will need in writing the description. Record any information you believe pertinent.

INFORMATION – GATHERING

Major Responsibilities

- What is the main purpose of the job? (In other words, what is the job paid to accomplish? What is the basic reason why the job exists?)
- Which responsibilities are the most time-consuming?
- What is each responsibility intended to achieve?
- What responsibilities does the job have that may not usually be associated with such a position?

Environment

- What is the nature of character of the job?
- Is there anything unusual about the environment in which the job exists, and if so, how do these unusual features affect this particular job? (For example, the geographic settings; the uniqueness of the community; the relationship with other health care agencies; the relationships among departments or services; the existence of unions; the physical facilities; uneven workflow; etc.)

Hardest Parts of the Job

- What are the position's major headaches?

- What is its greatest challenge?
- Which parts of the job require the most complex thinking?
- Which parts of the job require assistance from others?

NOTE: Difficult aspects of the job could be technical, managerial, or concerned with such things as unusual relationships connected with the job.

Authority

- What role does this position play in formulating policy?
- What role does this position play in developing systems and procedures?
- What are the most important decisions someone in this position would make without consulting his/her supervisor? (For example, hiring; firing; promotions; changing the methods or procedures, etc.)
- What limit is there on the authority of this position to spend money?
- What is this position's role in budget development?
- What forms must be signed by the supervisor?
- What must someone in this position inform his/her supervisor about before taking action?
- What are the most important recommendations someone in this position would make to his/her supervisor?

Relations to Others

- To what position does this position report?
- Are there others to whom this position provides advice or support?
- What subordinates report to this position? Briefly describe their primary responsibilities.
- Who does this position work with in other departments? Outside the organization? Who does this position work with in other agencies?
- What are the reasons for these contacts?
- Who are the other positions reporting to the same immediate supervisor (provide job titles).

Statistics on Job Dimensions

- What are the ACTUAL NUMERICAL VALUES (approximate) of all data which help to explain the overall size of the job (total employees supervised directly and indirectly, payroll and/or expense, budget, operating expenditures, etc.)?
- Which of these are this position's direct responsibility?
- Which others does this position influence?

Additional Information

- Record any other information which may be helpful in giving a true picture of the nature of the job.

ORGANIZING THE DATA

- Having gathered the required information, the next step is to begin writing the job description. As illustrated by the example shown earlier, it will consist of six sections:
 - Primary Focus
 - Job Context
 - Specific Accountability
 - Organizational Structure
 - Dimensions
 - Working Conditions
- The bulk of the information will be presented in the Organization Structure and the Nature and Scope sections. The three areas – General Accountability, Dimensions and Specific Accountabilities – serve to summarize, highlight, emphasize or further clarify key information contained in Organization Structure and Nature and Scope, to reflect the essence of the job.
- When the writing and editing is complete, there will probably be enough information for two and a half or three single-space typewritten pages. This is generally enough for any job. Thus, a large part of the task is to **sift** through the numerous activities, problems, interrelationships and other important job information, to determine which of it should be used and how it can be tightly woven together.

STEP TWO

WRITE THE PRIMARY FOCUS SECTION

- This section requires a brief, undetailed, but specific statement of why the position exists. In other words, what is its primary purpose of being included in the organization? It can generally be written according to the following format:

The (position title) is accountable for (a brief summary of the global end result expected of the position) .

- Try to keep the statement to one sentence. Avoid a lot of detail. Say what the job is supposed to **accomplish**.

SOME EXAMPLES OF GENERAL ACCOUNTABILITIES

For a Chief Executive Officer

- The Chief Executive Officer is accountable for providing the overall direction, control and coordination necessary for the effective and efficient operation and continued quality relevancy of the organization's services and programs.

For a Director of Nursing

- The Director of Nursing is accountable for developing and maintaining a nursing organization designed to provide quality nursing care to patients throughout the facility.

For a Director of Human Resources

- The Director of Human Resources is accountable for the development, recommendation, and implementation of sound human resources programs needed to enable the organization to attract, develop and retain high caliber employees.

For a Director of Finance

- The Director of Finance is accountable for the development and implementation of programs for control of assets, budgetary planning, expenditure control, and accounting for revenue and operating costs in accordance with organizational policies and procedures and for the provision of counsel and advise to management on all budgetary and financial matters.

For a Nursing Coordinator

- The Nursing Coordinator is accountable for developing, maintaining and evaluating programs and plans to ensure high quality client care.

STEP THREE

JOB CONTEXT

- This section is the narrative part of the description and describes the nature of the position, its requirements and challenges, the environment in which the job exists and the freedom to act permitted in the job.
- The length of this section will vary, but usually covers about one to two single-spaced pages. Even that amount of space, however, requires tight, concise writing.
- The organization of this section generally contains the pertinent information of these headings:

1. Environment of the position and the functions or services this position department provides:

- brief description of the agency, department, division or other appropriate unit within which this position operates;
- unique economic, environmental, technological or other unusual aspects of this position.

2. Functions performed by this position specifically:

- as distinguished from those performed through subordinates or in concert with others.

3. Major challenges to this position:

- nature and variety of most typical problems;
- the greatest challenges in the job.

4. Controls on the position's freedom to act and to solve job problems:

- types of problems that must be referred to a supervisor for resolution or for approval of a recommended solution;
- authority that this position has for such decisions as: hiring of personnel, purchasing supplies and services; developing budget, scheduling, etc.;
- principal rules, regulations, precedents and controls within which the position operated.

5. Contacts inside and outside the Organization:

- the most **significant** contacts with other areas within the organization – frequency and **purpose**;
- the most **significant** contacts outside the organization, frequency and **purpose**;
- types of problems which require consultation with others to resolve;
- major committees of which this position is a member – **purpose** and **role**;
- **job-related** outside organizations of which this position is a member – to attain **what results**?

6. For individual contributor positions:

- Emphasize the flow of work, unit, action taken, and output.

Input:

- Source of work assignment from supervisor, routine work flow, referral from other departments, and/or self-initiated.

Action taken by this position:

- Sufficient **description of the action** to **illustrate** the technical, practical and specialized depth of knowledge required;
- Types of problems dealt with by this position.

Output:

- The end results of work in the form of decisions, recommendations, reports, etc.
- The Job Context section is perhaps the hardest part of the description and will probably take the most time. Do not expect the first attempt to be the final draft. First, decide on the general outline – paragraph headings of specific areas needed to be covered. Then begin to fill in the details from the raw information sheets. Leave it for a short time, then go back and re-write. Look at the examples in this manual.
- Use simple language in writing the narrative, but paint a picture of the real job and **give examples to illustrate**.

EXAMPLE OF JOB CONTEXT SECTION FOR THE DIRECTOR OF PHYSICAL PLANT

- The Physical Plant Department was created in 1969 to oversee the construction necessary to ensure that the hospital meets government standards, to develop the layout and design drawings for various alterations, and to coordinate the work of outside architects and consulting engineers. The job also entails keeping up-to-date with existing conditions and requirements and making provisions for increases in service for facilities to meet future requirements. The incumbent is concerned with such things as: planning changes within a department, and relations; building alterations; general engineering; energy conservation, and waste management.
- The most frequent problems in the job are caused by the number of people involved in any given project and the consequent difficulties in communication. There are also complex technical problems (i.e. the boiler had to be converted from coal to gas with light oil standby) and there are difficult problems involved in trying to sort out exactly what people's needs are, particularly the medical staff who do not appreciate the ramifications of the requests. The major challenge in the job relates to the fact that there are many different projects, each of which requires research in to the nature of the service provided in the unit and knowledge of the equipment to be used.
- The incumbent must abide by approximately 50 different Building Codes as well as government and municipal standards for various kinds of specialized nursing units.
- The Director of Physical Plant consults with the Chief Executive Officer whenever his/her function is likely to affect the relationship with the Medical staff. He would also acquaint the Chief Executive Officer with the final design drawings for any proposed changes, particularly if they will affect patient care, the appearance of the grounds or buildings, or involve a capital expenditure. He would also seek the agreement of the Department Head in any area where changes are proposed.
- The incumbent is a member of the Management Committee; Fire Prevention Committee; Hospital Planning Committee; and the Disaster Committee.
- The Director's main external contact are with: Hospital ABC which is an extended care facility on adjacent property to which XYZ Hospital supplies steam, electricity and the occasional services of tradesmen; engineers; architects; the municipal government regarding roads, sewers, fences and a variety of permits; and the Police regarding security.
- The Director prepares an annual budget for his/her Department which he submits to the Director of Finance.
- Whenever renovations are required, the Director will either carry them out using hospital staff if the project is relatively small, or retain an outside architect who in turn will call for

tenders. The incumbent has the accountability to prepare the specifications for all renovation or construction projects.

STEP FOUR

WRITE THE SPECIFIC ACCOUNTABILITIES

- This is the section in which the end results expected of the position are defined. The terms “end results” **does not mean a list of the activities or duties**, but rather, fairly board statements of what the job is intended to accomplish.
- A typical specific accountability statement for one aspect of a **Chief Executive Officer’s** job might be:

“Improve operating performance and assure management succession by selecting, developing, motivating, and effectively utilizing key management personnel.”
- **For a Food Service Manager:**

“Develop and implement plans for providing tasty and nourishing meals.”
- **For a Housekeeping Manager:**

“Ensure a high standard of cleanliness and infection control through a program of regular cleaning, methods, study, and product evaluation.”
- As these examples illustrate, accountabilities imply action and measurement of performance. Each accountability relates to an important end result which must be accomplished, and implies how and how well the end result is to be achieved.
- For the most part, the Specific Accountabilities are derived from the information in the Nature and Scope section. In fact, the main points made about the job in that section should be paralleled by specific accountabilities. Conversely, the Specific Accountabilities should
- be covered by part of the Nature and Scope. Do not introduce into the Specific Accountabilities some aspect which is not mentioned in the Nature and Scope – go back and expand the latter.
- Usually it takes a set of four to seven separate statement to cover a single job. A set of Specific Accountabilities for a Director or Therapies might be:
 1. Provide quality client care through ongoing monitoring of client needs within the organization and through the development and updating of policies and procedures.

2. To exercise fiscal responsibilities by maintaining staffing patterns within budgetary guidelines and through effective administration of therapy employees, including supervision, evaluation, hiring and disciplinary matters.
 3. To contribute to budget development for therapy operations by developing an operating budget and yearly equipment request.
 4. To facilitate effective organizational planning by developing and maintaining statistical reports on therapy activities.
 5. Contribute to good public relations within and outside the organization through consultation with other agencies, through client and family contacts and by being available as a resource when needed such as involvement in intra-agency and extra-agency committees.
 6. To ensure the maintenance of the team approach to health care by acting as a resource for staff education, client counseling and for other areas as needed.
- All of the previous statements are composed in the same format:
 - start with an action verb, such as provide, ensure, develop, improve, maintain, influence, supply, etc.;
 - state an end results;
 - state in which ways the end result is to be achieved – the means to be used. The words “by” and “through” are commonly used at the beginning of the ‘means’ clause.
 - For example, statement no 1. for the Director of Therapies, can be split into its components as follows:
 - Verb: Provide
 - End Result: Quality Client Care
 - Means: Through ongoing monitoring of client needs within the organization and through the development and updating of policies and procedures.
 - Although all of the examples above are written in the same format, other formats may be used. No matter what the format, however, all statements include the ends results and means clause. A common way of composing specific accountabilities is to put the end result last.

Major Job Aspects

- In four to seven statements, all the major aspects of the job should be covered. There is no simple rule for deciding how to split the job’s accountabilities into separate statements.

- For most managerial positions, the focus of accountabilities is on the elements of management – organizing, motivating, planning, formulating, coordinating, controlling – and should reflect the basic areas of end results essential to the success of the position’s department or function. For example, department effectiveness and efficiency, manpower development, etc.
- Other typical breakdowns are:

1) Quantity;	1) Planning
2) Quality;	2) Achieving Objectives;
3) Innovations; OR	3) Control;
4) People; and	4) People; and
5) Contacts.	5) Information.
- This position will have to be analyzed to see how to split it up.

EXAMPLES OF SPECIFIC ACCOUNTABILITIES

For a Director of Finance

1. Contribute to maximum operating efficiency through effective financial planning and reporting and the resolution of organizational and divisional financial problems.
2. Contribute to effective management of the organization through the development of short and long-range operating and capital budgets and forecasts and the provision of competent financial advice to senior managers in the development of their operating plans.
3. Safeguard the organization’s assets through effective internal audits.
4. Ensure the continual achievement of the financial division’s objectives through the acquisition, development and motivation of staff.

For a Manager of Personnel Development

1. Assist management in fully and effectively utilizing the organization’s personnel by developing and implementing appropriate personnel policies, programs and procedures.
2. Develop an understanding and acceptance by management of a positive personnel philosophy and for the need to upgrade personnel throughout the organization by effectively selling departmental services, programs and policies.
3. Ensure a continuing supply of suitable candidates for management and specialist positions by providing advice, assistance, and programs of selection, training, performance appraisal, manpower inventory and succession planning.

4. Ensure the continuing achievement of department objectives through the effective acquisition, development, and utilization of human, financial and other resources.
5. Assist organization to achieve an effective labour/management relationship by ensuring that all supervisory personnel administer the collective agreements in a consistent and equitable manner.
6. Contribute to the effectiveness of collective bargaining by participating as a member of the collective bargaining team and in the preparation for negotiations.

STEP FIVE

WRITE THE ORGANIZATION STRUCTURE SECTION

- This section identifies:
 - to what position this job reports;
 - which other positions report to the same supervisor;
 - which jobs report directly to this position;
 - a brief summary of the activities carried out by those people reporting directly to this position; and
 - the total number of staff for which each subordinate is accountable, both **directly and indirectly**.
- It will be convenient to use standard wording when describing the reporting relationships. A good way is to write:

This position is one of # reporting to the title .

The other # are title , title , title , etc.

- If the relationship between the jobs is not clear from the titles or content, add a sentence or so explaining the special relationships. For example, there may be several jobs with the same title as this job. Are they all doing the same job? If so, say so. If not, explain why and in which way this job is different.
- Next, outline how the subordinate staff, if any, are organized and what they do. Such as:

There are # positions reporting directly to the title . They are:

 Title : #3 – 4 lines describing the job . Staff of # .

Title : (3 – 4 lines describing the job) . Staff of # .

and so on for **each job** reporting directly to this position.

- Each subordinate position can be so described in an **indented** paragraph, usually containing only one or two sentences.
- If this position is an individual contributor position with no subordinate staff, state:

“There are no subordinates reporting to this position.”

- It may also be appropriate to describe any functional relationships associated with the job, such as:

For a Chief Dietitian

The Chief Dietitian provides functional direction to the Cook regarding the preparation of therapeutic menus. (In this example, the Cook **does not** report to the Chief Dietitian, but rather to a Food Services Manager. The relationship with the Chief Dietitian exists for the purpose of receiving expert advice.)

EXAMPLES OF AN ORGANIZATION STRUCTURE SECTION

CHIEF EXECUTIVE OFFICER

This position is the only position reporting to the Board of Directors.

There are two positions reporting to the Chief Executive Officer. They are:

1. **Director of Care:** accountable for developing and maintaining a resident care program designed to provide high quality care to all clients/residents. (Staff of 14 FTE.)
2. **Director of Finance and Support Services:** accountable for the development and coordination of financial and accounting systems and programs as well as the direction and management of the Housekeeping, Engineering and Maintenance, Laundry/Linen, and Dietary departments. (Staff of 17 FTE.)

STEP SIX

DIMENSIONS OF THE JOB

- In this section, record the measurable areas upon which the position has **either direct or indirect impact**. Show the three or four dimensions which are most appropriate to the job. They may include any or all of the pertinent following statistics:
 - Total number of people supervised (Full-Time Equivalents).
 - Annual payroll of those supervised.
 - Annual operating expenses (excluding payroll).
 - Various assets controlled or affected.
 - Any other significant dollar or other values on an annual basis.
- There may be others; show the figures for those items over which the job has influence, **direct or indirect**.
- In showing figures, don't worry about being too exact. Approximate figures are fine.

EXAMPLES OF DIMENSION

For a Chief Executive Officer

Number of Employees (FTE):	55
Total Number of Employees:	74
Annual Operation Budget:	\$4.5 MM
Beds:	60 beds

For a Director of Human Resources

Departmental Staff:	2.5
Departmental Operating Budget:	\$134 M
Facility Staff:	55 FTE
Facility Payroll:	\$3.25 MM

For a Director of Health Services

Health Services Budget:	\$18 MM
Health Services Staff:	550 FTE

For a Director of Physical Plant

Staff:	30 FTE
Annual Salaries & Wages:	\$625 M
Annual Operating Expenses:	<u>\$500 M</u> \$1.125 MM
Average Annual Capital Expenditure:	\$10 M (can range from \$2 M to \$20 M)

For a Home Care Manager

Annual Operating Budget:	\$680 M
Annual Payroll:	\$476 M
Staff (Full-Time Equivalent):	21 FTE (8 F/T, 52 P/T)
Nursing Service Units (monthly average)	435
Homemaking Service Units (monthly average)	1,742
Total Active Clients (monthly average)	397
Total Clients Served Annually:	629
Population Base:	16,500

STEP SEVEN

WORKING CONDITIONS

This section is designed to help the reader understand the conditions under which you perform your job. Four kinds of working conditions are considered:

- **Physical Effort:** lifting, carrying, pushing, pulling, standing, etc.
- **Physical Environment:** fumes, extreme temperatures, noise, dust, etc.
- **Sensory Attention:** focused attention with one or more senses – seeing, hearing, smelling, touching
- **Mental Stress:** job causes of anxiety, tension or mental discomfort – deadline pressures, frequent interruptions, isolation, repetitious work, exposure to emotionally disturbing experiences, etc.

It is important to describe your working conditions as most people would see them. For example, some people might describe a situation as noisy, and other people would not.

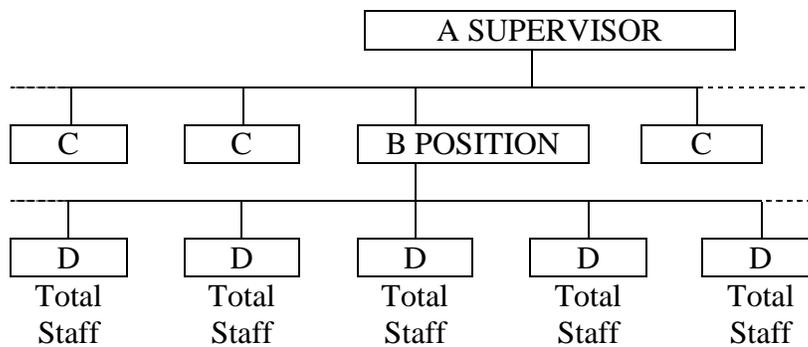
In addition to a list of conditions under which you must do your job, you should describe the conditions in terms of “intensity”, “frequency” and “duration”. For example:

- Nature and Intensity: What kind of working conditions do you experience? When the condition occurs, is it mild, moderately strong or very strong?
- Frequency and Duration: Is the condition always there? If not, how often does it happen – hourly, several times daily, weekly, monthly? And when it happens, how long does it last?

OTHER INFORMATION

A. DRAW A CHART OF THE ORGANIZATION SURROUNDING THE JOB

The following is an example of an organizational chart:



Box A: Would be the supervisor's job.

Box B: This position.

Box C's: Would be the other jobs, if any, which report **directly** to the same supervisor.

Box D's: Would be the jobs, if any, which report **directly** to this position.

- The dotted lines simply show that there could be more or fewer C's, and more or fewer D's.

- **On a blank page**, please draw a similar type of chart showing the title of:

A: The Supervisor's job.

B: This job.

C's: All the jobs (if any) which also report **directly to the same supervisor**.

D's: All the jobs (if any) which report **directly to this position**.

- Draw as many boxes as necessary in order to show the complete picture. Put the **official title** of the jobs in the boxes (use short forms of the titles if necessary).

- The Organizational Chart should be the **last page** of the Job Description. The Chart may be drawn horizontally or vertically on the page, depending upon the amount of space needed.

B. REVIEW AND CRITIQUE THE DRAFT DESCRIPTION

- Before submitting the job description for approval and evaluation, review it one last time.
- Here are some **COMMON FAULTS** found in position descriptions.

Primary Focus

1. Summary of duties rather than the primary purpose or global end result.
2. Length, detailed list of activities taking five to ten lines – should seldom exceed three to four lines.

Dimensions

1. Attempt to be too precise – approximate figures or data are sufficient ($\pm 10 - 20\%$ is enough).
2. Should seldom exceed three or four different dimensions.

Organization Structure and Job Context

1. Organizational relations, upwards or subordinate, are confusing or incomplete, or contradict organizational chart, or do not differentiate between line and functional relationships.
2. Significant lateral organizational relations omitted.
3. Inadequate description of the nature and complexity of the service or function.
4. Reluctance to use typical examples to add meaning.
5. Inclusion of personal judgments or conclusions.
6. Inclusion of incumbent's or supervisor's opinion on education and experience required. These are staffing standards and can be kept in other records, but **should not** be included in position descriptions.
7. Vague generalities, rather than precise, clear, and concise language.
8. Description of freedom to act or procedural controls that exist for subordinate's jobs. These are only pertinent in the subordinate's descriptions.

9. Committee memberships included without the role of the committee and/or of the incumbent on that committee being clear.
10. Does not recognize the role the position plays in the overall administrative process. (For example, the description of a position accountable for purchasing materials and equipment should outline the position's role in the **total purchasing process** including feasibility, specifications, selection of source, price determination, budget allocation, expediting delivery and installation. In addition, this role may differ depending upon the material, equipment, or cost level. This does not mean it is necessary to quote detailed written organizational procedure involved, but usually one or two sentences will provide what is needed.)
11. No mention of the greatest challenge(s) or major problem(s) faced by the position.
12. No mention of where the incumbent can obtain assistance with his/her problems, either inside or outside the organization.

Specific Accountabilities

1. Restatement of activities or duties, rather than major end results.
2. Relationships between the end result and the "how" is tenuous.
3. One specific accountability statement covers several end results to the extent that it encompasses the major portion of what is expected from the job.
4. An end result area included that is not described in Nature and Scope.
5. Too many, four to seven are usually enough. More than seven usually indicates that this section has been written at the duty level.

Some Faults Common to All Sections of Descriptions

1. Description is too long and detailed with several irrelevancies.
2. Description is too short and superficial, does not capture the job.
3. Incorrect emphasis on different aspects of the job.
4. Incomplete facts, for example concerning number of subordinates, locations, programs, services, equipment, etc.

C. HAVE THE DESCRIPTION APPROVED

- Regardless of who prepares the description, both the incumbent and the supervisor must approve it.

- Some discussion may result from this step. This is good because agreement in writing is the best way to get a common understanding on any subject. Probably both the incumbent and the supervisor will have a clearer idea of what the job is supposed to accomplish.
- Having been through this approval process, the job description is now completed. We hope this manual has provided assistance through the writing process with a minimum of difficulty.

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PART B

THE POSITION DESCRIPTION

QUESTIONNAIRE

THE POSITION DESCRIPTION QUESTIONNAIRE

PURPOSE

- This questionnaire is designed to assist in providing current and complete information regarding the content of a position.

INSTRUCTIONS

- You will note that the questionnaire is divided into a number of sections. **Please read the entire form** thoroughly so that you will understand its total scope **before** attempting to complete any individual section.
- This questionnaire is intended to cover **all** out-of-scope jobs. Consequently, some questions will be more appropriate for jobs at one level than for jobs at a different level.
- It will be easier to complete this questionnaire with respect to “line” jobs rather than “staff” jobs. However, for staff positions it is encouraged that as many questions as possible, be answered and particular attention be paid to those questions marked with an asterisk (*). These questions tend to be less structured and are intended to help express the unique characteristics of a position.
- In completing each section, be specific and concise, describing the position as it currently exists. Please feel free to add any examples that will assist the reader to fully understand the position. **It is not essential to answer every question.**
- The incumbent and his/her supervisor should discuss the content to ensure that there is agreement about all aspects of the job.
- The final copy **MUST** be agreed upon and signed by both the incumbent and his/her supervisor.

POSITION QUESTIONNAIRE FORM

POSITION DESCRIPTION

POSITION (TITLE):

INCUMBENT:

DIVISION/DEPT:

ORGANIZATION:

DATE (month & year):

LOCATION:

APPROVAL SIGNATURES: _____

Incumbent

Supervisor

DIMENSIONS:

Please provide figures which indicate the overall size of the area of responsibility. Exact figures are not important; budget figures or reasonable estimates will do. Of interest here are such items as:

- Staff Full-Time Equivalents in each of the following categories:

Full-Time: _____ Professional: _____

Part-Time: _____ Non-Professional: _____

- Total number of beds:
- Annual salaries and wages:
- Annual operating expenses (excluding salaries & wages):
- Population:
- Service Units:
- Other:

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- Many jobs – particularly staff positions – exist primarily to have an impact on something other than one department. If this is true of this job, provide appropriate indications (numerical or otherwise) of the size of those areas or functions which the position influences:

* **BACKGROUND OR HISTORY OF THE JOB**

- Please write a few sentences describing the **background** of this job. (For example, try to answer such questions as: “Why was this job first created?” “What was happening in the organization (or division or department, etc.) that made a job like this necessary?” “How has the job changed over time?”)
- Please do not restrict the response to these questions but write **anything** that would help the reader to understand the job better.

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WHERE THE JOB FITS IN THE ORGANIZATION

a) Other Positions Reporting Directly to this Position’s Supervisor

List the titles of other positions which report **directly** to this position’s supervisor.

b) Subordinates

List the titles of this position’s **immediate** subordinates, and give a brief description of what each does. Include the number of employees that each of the immediate subordinates supervises, both directly and indirectly.

TITLE	WHAT HE/SHE DOES	<u>TOTAL</u> NUMBER OF EMPLOYEES HE/SHE IS RESPONSIBLE FOR

c) Functional Direction or Guidance

* (i) List the titles of any jobs **to** which this position provides direction or guidance even though they do not report to his position. Describe the **nature** of the guidance or direction the position provides.

OTHER JOBS <u>TO</u> WHICH THE POSITION PROVIDES GUIDANCE OR DIRECTION	NATURE OF GUIDANCE

* (ii) List the titles of any jobs **besides this POSITION’S supervisor from which** guidance or direction is received. Describe the **nature** of the guidance or direction received.

OTHER JOBS <u>FROM</u> WHICH THE POSITION RECEIVES GUIDANCE OR DIRECTION	NATURE OF GUIDANCE

MAJOR ELEMENTS OF THE JOB

Describe the five or six **most important** elements or responsibilities of the job. Indicate the **approximate** percentage of time spend on each part.

MAJOR ELEMENTS OF THE JOB		APPROXIMATE PERCENTAGE OF TIME
1.		
2.		
3.		
4.		
5.		
6.		

EQUIPMENT OPERATION

If the operation of equipment is a **significant** part of the job, please list the types of equipment that are required to be used. Indicate the proportion of time spent operating each type, and describe the role, if any, in equipment maintenance.

TYPE OF EQUIPMENT	PROPORTION OF TIME	ROLE IN EQUIPMENT MAINTENANCE

* **THE THINKING REQUIRED IN THE JOB**

In all jobs there is some **thinking** to be done. There are problems to solve and challenges to be met. These are a normal part of the job. They can be **technical** or **managerial** in nature.

- a) What are the **most frequent** problems in this job? Please **explain**. Give **examples** if they will help to explain.

b) What are the **toughest problems** in this job? Please **explain**. **Examples** might help to explain.

c) What are the most **challenging** aspects of this job? Please **explain**. Again, **examples** might be helpful.

ASSISTANCE AVAILABLE TO THIS POSITION

a) What kinds of problems are taken to the supervisor? Please **explain**. **Examples** might be helpful.

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b) Besides the supervisor, who else can the incumbent go to for help with problems?

OTHER PEOPLE	TYPES OF PROBLEMS

c) What procedures or manual are there to help to do this job?

PROCEDURES	MANUALS

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AUTHORITY

- a) If the incumbent wanted to **increase the number of employees in the department over the budgeted number**, would the supervisor’s (or someone else’s) approval be required?
- b) If the incumbent wanted to **hire** someone for a job which is open in the department, would he/she have to get the supervisor’s (or someone else’s) approval?

Would the supervisor (or someone else) have to approve the salary?

- c) If the incumbent wanted to **fire** someone, would he/she have to get the supervisor’s (or someone else’s) approval?
- d) If the incumbent wanted to **promote** someone, would he/she have to get his/her supervisor’s (or someone else’s) approval?

Up to what **limit** can the position:

- (i) Purchase **non-stock supplies** without getting anyone else’s approval?
- (ii) Make **capital purchases** (for example equipment) without getting anyone else’s approval?
- (ii) For capital purchases within budget, can this position authorize substitution of items?

Within Budget	Outside of Budget

- e) If the incumbent wished to change the organizational structure of the department, could he/she do so without referring to his/her supervisor?
- f) What other kinds of decisions **must** be taken to the supervisor?

- g) What kinds of **recommendations** are made to the supervisor or to other staff?
- h) What kinds of decisions are made **without getting the supervisor's approval in any form** (including his/her signature on a form)? Please **underline** the most important ones.
- i) Are there any other people besides the supervisor from whom the incumbent must get approval **or** agreement before taking action? If so, **who** are they, and **what are the circumstances** under which such approval or agreement is necessary?

PERSON (TITLE)	CIRCUMSTANCES

* **COMMITTEE OR TASK FORCE MEMBERSHIP**

List the major Committees or Task Forces, **inside the organization** of which the incumbent is a member. Briefly describe the **purpose** of each Committee or Task Force.

COMMITTEE OR TASK FORCE	PURPOSE

* **RELATIONS WITH OTHERS**

- a) As part of the job, what **important** contacts does the position have with other positions or departments aside from the members of same department/division/organization and same supervisor? Describe the **nature or purpose** and the **frequency** of these contacts.

PERSON OR DEPARTMENTS WITH WHICH THERE ARE IMPORTANT CONTACTS	PURPOSE	FREQUENCY OF CONTACT

- * b) If the job involves contact with people **outside** the organization, describe the **nature or purpose, level, and the frequency** of these contacts.

OUTSIDE CONTACT	LEVEL	PURPOSE OF CONTACT	FREQUENCY OF CONTACT

- * c) Does this position have any contact with **government** on behalf of the organization? If so, please **explain** the purpose briefly.

GOVERNMENT CONTACT	PURPOSE

REPORTS

What reports does the incumbent prepare? A few words of **explanation** about each would be helpful. Indicate the **frequency** wherever possible and **to whom** each one is sent.

REPORT	TO WHOM SENT (TITLE)	PURPOSE OF REPORT	FREQUENCY

* **POLICY AND PROCEDURE DEVELOPMENT**

- a) What is this position's role in **policy formulation**?

- b) What is this position's role in the **development of procedures**?

* **SPECIAL FEATURES OF THE JOB**

Please write a few sentences describing **anything** about the job which is **unusual or especially important** for the reader to know about in order to fully understand the job.

SPECIFIC ACCOUNTABILITES

Specific accountabilities are the **major end results** which the job is expected to accomplish, against which some measure of performance can be applied.

There are two parts to each specific accountability: 1) the end result to be achieved, and 2) the means of achieving it (usually indicated by the words “by” or “through”).

For example, one specific accountability for an Assistance Executive Director, Patient Care could be: “Contribute to the provision of quality health care (**a major end result**) **by** ensuring the efficiency and effectiveness of nursing, cardio-pulmonary therapy, physical medicine, and pharmacy services (the **means** of achieving the end result).

In the following space, list the three to seven specific accountabilities of this job.

MAJOR END RESULTS	MEANS OF ACHIEVING THESE END RESULTS (“BY” OR “THROUGH”)
1.	by/through
2.	by/through
3.	by/through
4.	by/through
5.	by/through
6.	by/through
7.	by/through

WORKING CONDITIONS

1) Physical Effort

What kind of physical activity is required in your job which causes you physical stress or fatigue? Examples could include lifting, carrying, pushing or pulling (what?), stretching (why), climbing, standing, stooping, working in a fixed or awkward position.

A) <u>Nature and Intensity</u> (What kind of effort? How stressful or fatiguing – very little, moderate, considerable or extreme?)	B) <u>Frequency and Duration</u> (How often does it happen? When it happens, how long does it last?)

2) Physical Environment

What physical conditions are you exposed to in your job which increases the risk of accident, ill-health, or discomfort? Examples could include fumes, temperature extremes, noise, vibration, dirt, dust, hazardous substances, equipment or circumstances, or extensive travel.

A) <u>Nature and Intensity</u> (What conditions exist? How undesirable or hazardous are they – mild, moderate, considerable, extreme?)	B) <u>Frequency and Duration</u> (How often do the conditions occur? When they occur, how long do they last?)

3) Sensory Attention

Every job requires a normal level of sensory attention. To what extent is focused attention with one or more of your senses required in your job (seeing, hearing, smelling, tasting, touching)? Is there a need to concentrate with two or more senses at the same time?

A) <u>Nature and Intensity</u> (What senses are used? How intense does the concentration have to be – very little, moderate, considerable, extreme?)	B) <u>Frequency and Duration</u> (How often does this happen? When this happens, how long does it last?)

4) Mental Stress

What conditions in your job cause you anxiety, tension or some form of mental discomfort? Examples could include deadline pressure, lack of control over the pace of your work, disruption of lifestyle, isolation, repetitious work, exposure to emotionally disturbing experiences.

A) <u>Nature and Intensity</u> (What conditions exist? How strong is the mental discomfort they cause – mild, moderate, considerable, extreme?)	B) <u>Frequency and Duration</u> (How often do the conditions occur? When they occur, how long do they last?)

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COMPLEXITIES OR SUBTLETIES OF THE JOB THAT MAY HAVE BEEN MISSED

The previous sections have covered the **basics** of the job and hopefully some of its unique characteristics as well. Following is a list of topics which may bring to mind aspects of the job which should also be mentioned or explained in more detail.

On a blank page, please **write** a few sentences on **any** of these topics (**or any other topic**) which would help the reader to understand the job better. (Use as many sheets as necessary.)

Active care	Organizational development
Administrative/medical interface	Organization philosophy and objectives
Alterations	Outpatients
Ambulatory care	Pace of change
Board of Directors/Governors/Trustees	Planning
Budget (e.g. development)	Procedures
Change	Professional associations
Chronic care	Quality
Client-population	Religious affiliation(s)
Community college relationships	Research
Community services	Salary administration
Cost centre	Satellite facilities
Counseling	Services
Emergency care	Shifts
Equipment	Shortages
Expansion	Special services
Financing	Staff relations (i.e. discipline, evaluation, development, motivation, terms & conditions, contracts)
Forecasting	Staffing
Geography	Standards
Government	Strategic planning
Information	Student – medical or other
Innovation	Supplies (selection of?)
In-patients	Technological sophistication
Inter-agency relationships	Technology
Legal responsibilities	Training
Management styles	Turnover
Manpower development	Union/staff associations
Matrix management	University relationships
Medical profession	Workflow
Methods	
Negotiations	
Organization structure	

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GENERAL ACCOUNTABILITY OF THE JOB

When everything is taken into consideration, what is the main **purpose** of the job? (In the **broadest** terms possible, what is it that the position is designed to accomplish? In other words, what is the basic reason **why** the job exists?)

The answer should be **similar in structure** to a Specific Accountability statement, but **broad** enough in **scope** to cover the **entire** job. Three or four lines should be sufficient:

Purpose (i.e. **the global** purpose or **end result** of the job):

By/Through (i.e. the **means** of achieving that end result):

REVIEW

Please review what has been written in answer to this questionnaire. Will it convey the full “flavour” of the job to the reader? If not, provide additional information here.