

INSTRUCTIONS FOR COMPLETING THE POSITION DESCRIPTION FORM

CITY OF PORTLAND BUREAU OF HUMAN RESOURCES

Classification & Compensation

Please be thorough and accurate when completing the Position Description (PD) form since it serves as the foundation for how a position will be classified and is essential for other employment decisions. Write "Not Applicable" or "N/A" if an item on the form does not apply to your position or current duties.

Preparing good position function statements takes thought and time. Even Human Resources and business professionals, who write position descriptions or recruitment ads regularly, find it challenging to succinctly describe a position's key functions. A good way to begin may be to outline key projects for a week, a month, a quarter or for a year, or complete the Position Description Worksheet. Once projects are identified, then identify related tasks and group them into functions. Grouping together or mapping similar tasks to each key function should help identify critical skills and training.

If you have questions, please consult your supervisor or contact your Human Resources Business Partner (HRBP). The PD's contents are vital for an effective analysis of any position, be it vacant, new or filled.

All electronic forms, instructions, and up-to-date information relating to Classification and Compensation will be available at <http://www.portlandoregon.gov/bhr/65978>.

Section 1 -- Position Information: Complete this section to fully identify the position's bureau, division, current classification, working title, incumbent's name, and other information as requested. If the position is part-time (less than 72 scheduled work hours per pay period), please indicate the average or typical number of hours worked per week. If the position is classified as "Limited Duration," whether full-time or part-time, please check the "Limited Duration" box. A Limited Duration appointment is an appointment to an identified City classification, which is to a) fill a regular employee's vacancy due to a leave of absence expected to last two years or less, or b) to a Limited Term position. A Limited Term position is one that has been established for a specific and finite period of time to allow coverage for specific needs related to grants, one-time funds, and special projects. A Limited Term position shall not exceed two (2) years except for the extension of grants or funding from outside sources.

Section 2 -- Program Information and Purpose of Position: Provide a brief summary of the program the position supports, and the main purpose of this position. For the purpose of this section, the term program refers to the organizational unit subordinate to the Bureau (Division, Section, Unit, etc.) created to perform a specific function in furtherance of the mission of the Bureau. The purpose of the program is different than the mission of the Bureau, but should support that mission. Indicate the key result(s) the position is expected to achieve. Please explain any acronyms that are used in the documents.

Example of Program Purpose: Human Resources provides a full spectrum of services in order to attract, develop and sustain a diverse and talented workforce. In furtherance of this mission, the Classification and Compensation program develops and manages the City's classification and compensation plans and systems, including creating new classifications, classifying new positions, establishing compensation policies and consulting to City Bureaus.

Example of Position Purpose: This position oversees the City's classification and compensation systems to ensure the City maintains a competitive market position to recruit, develop and retain talented, skilled applicants and employees.

Section 3 -- Description of Position Duties: Describe 4-6 primary **major/essential functions** and the associated tasks the position performs related to each primary function. Essential functions take 10% or more of the employee's time and are related to the position's direct contributions to the work unit's product(s) or services. Include the approximate percentage of time (see below) spent on each function over an annual cycle and list them in descending order of importance. Indicate how frequently the tasks are completed (e.g. daily, weekly, monthly, annually).

When listing position functions, consider the following questions to structure the statements:

- What does the position do?
- For or with whom is work completed or shared?
- For what purpose is the function performed?
- How and with what equipment, processes or people are duties carried out?

Group task statements under general headings for major components of the position. Be direct and concise while providing enough detail so others who are unfamiliar with the position can generally understand the major focus, duties and functions of the position. Begin each sentence with an action word, examples of which are listed in "Examples of Action Words" chart. Do not create a desk manual for the position describing every detail of work an employee may perform throughout the day or year. There must be sufficient detail, but a desk manual is a completely different document and is not helpful or desired for a classification review/analysis.

Examples Of Essential Functions Statements

Develop communication materials for employees: Write and edit final "camera ready" copy for employee benefit informational materials, e.g. pamphlets, hand-outs, brochures. Research issues related to benefits and design training materials by writing and editing new copy, or by updating or replicating existing materials. Select graphics, photos etc. to illustrate materials; lay out and "paste up" the final copy. Arrange the production of large quantities of printed material through the print shop.

Maintain and update the classification plan for the City: Meet with key decision makers and executives to communicate the need for, and gain support for classification system maintenance. Determine City priorities for system maintenance through group discussions and agreements; collect, present data and conduct formal analysis. Write a project plan to address identified needs, opportunities, and priorities.

Do Not assume every reader knows the position under review. For example,

"I teach employees how to use their computers" is not enough information. How are employees taught -- in class, and if yes, what types of classes? Does the position create handouts or other training materials? Does the position design the course content and objectives or use a standard package?

"I take care of the computer network when there is a problem" is too brief. How does the position respond in such situations? Is a repair technician or an external vendor called, or does the position diagnose the problem and repair and/or replace needed system components? The PD's content must be specific.

Percentage of Time. To assist in determining the percentage of time spent on a function, this chart provides an approximate percentage of full-time work for certain periods of time:

Typical hours or time worked on a function	Approximate Percentage of Full-Time Work
One day per week, every week	20%
One week per month, every month	23%
One hour per day, every day	12.5%
One day or eight hours per month, every month	5%
One month per year	8%

Other duties. List additional functions and duties the position performs that may be occasional or regular, but are not directly related to the primary focus of the position.

For additional examples and assistance on phrasing task statements, refer to "Task Examples Using Action Words".

Section 4 -- Guidelines: What are the boundaries within which the position operates? Are there legal guidelines or regulations to follow? What are the policies and procedures that direct or shape the work of the position?

Examples of guidelines/policies: *Generally Accepted Accounting Practices; City of Portland Administrative Rules; bureau policies and procedures.*

Does the position make recommendations about procedures or policies? If so, describe the types of recommendations, policies, and/or procedures.

Examples of recommendations/policies/procedures: *Recommends revisions to contract terms; revises accounting procedures for efficiency.*

Section 5 -- Decision Making: How much discretion does the position have to make decisions, determine procedures, or change work processes; or does the position follow specific procedures or general guidelines? For purposes of this section, we define decision as "the authority to interpret, act or decide on a course of action, and that is either independent of close supervisory direction, and/or specific procedures or guidelines." To what extent does the position have the authority to make these types of independent decisions? Does it have the authority to make these decisions without close supervisory direction, or is the supervisor *required* to review and approve the decision? Does the position make decisions using only general or broad guidelines or must it follow specific guidelines?

Examples:

Position decides which data to use to compile data from various sources and determines the format of the monthly reports, without supervisor's direction.

Position independently determines which current and historical financial data to use in order to recommend investment decisions.

Provide 3 to 5 examples of the important types of decisions this position routinely makes. Identify who or what the decisions will affect and the position's scope of influence with respect to decision-making. Indicate the name and title of the individual who must approve the decision, if anyone.

Examples:

Decides how community development block grant funding will be allocated to community based organizations.

Funding decisions will impact City goals and resources available to community organizations.

N/A (no one is required to review this decision)

Section 6 -- Work Contacts: Describe with whom this position routinely interacts in order to complete work assignments.

- a) Who is or what function(s) are regularly contacted? Examples: *co-workers and management (not the position's direct supervisor or direct reports) within the Bureau, co-workers or management of other Bureaus, other government organizations (do not list names, only types of service or functions), City Council, DOJ, compliance agencies, volunteer community groups, schools, citizens, etc.*
- b) How? Examples: *By phone, e-mail, in person, meetings, formal reports*
- c) Purpose? Examples: *To discuss services, clarify client expectations, fiscal planning, audit purposes*
- d) How Often? Examples: *Daily, Weekly, Quarterly, Annually*

Section 7 – Budget/Grant/Contract/Purchasing Authority: This section primarily applies to managers. Does the position have personal authority to spend bureau funds, control budgets or manage contracts or grants? If this position has authority to appropriate funds, develop and account for budgets, etc., use sections 7a to 7d to describe these responsibilities:

- a) Annual Overall Budget calculation: Annual Payroll + Operating Budget = Annual Overall Budget
- b) Does the position have the authority to spend bureau funds? If yes, indicate the dollar limit of that authority and for what purpose(s).
- c) Describe the number, dollar amount and types of contracts or grants. What is the intent of the contract or grant?
- d) What budget/spending controls are in place?

Section 8 -- Review of Work: Who reviews the work of this position? List the direct supervisor's name, classification and working title, if used. Describe whether work is reviewed daily, weekly, monthly, etc. and the level of supervision the position receives. List others who may review work, e.g. peers, team leads, technical advisors, specialists, etc.

Section 9 -- Supervisory Duties:

- a) Identify the total number of employees for which this position has lead or supervisory responsibility within a given year (include direct and indirect responsibility) by type indicated. For casual/seasonal employees, enter the average hours worked by those employees in a one-year period. Note the following definitions to be used in this section. For further information, see HR Administrative Rule 3.03:
 - Regular/Permanent: an appointment from a certified list of eligibles to an established budgeted position following an examination process. For this section, count all employees who have attained permanent status (that is, they have successfully completed the probationary period) and those who are still in their probationary period.
 - Casual/Seasonal: an appointment to a position that occurs, terminates, and recurs periodically or regularly.
 - Temporary Appointment: an appointment not to exceed one year to a budgeted or non-budgeted position for the purpose of meeting emergency, non-recurring, and short-term workloads needs of the City. Temporary Appointments should be counted as a supervised position in this section.

- Limited Term: a position that has been approved and established by the Bureau of Human Resources for a specific and finite period of time to allow coverage for specific needs related to grants, one-time funds, and special projects. A limited term position shall not exceed two (2) years except for the extension of grants or funding from outside sources. Limited Term positions that are filled with Regular City employee should be counted as a supervised position in this section.
- b) What staff does this position directly supervise or lead? List the classifications, job codes and number of positions.
- c) Review the functions and check the appropriate boxes to indicate the level of supervisory or lead responsibility.
- “Take Action, Then Inform Supervisor” means that your position has the authority to take the indicated action or make the decision (as defined in Section 5), without asking for your supervisor’s approval first. [Note that *only* Bureau Directors have full independent authority to Hire / Promote / Transfer and Discharge / Suspend.]
 - “Effectively Recommend” means that although you cannot take that specific action without approval from your supervisor, your supervisor will effectively “approve” or “deny” your recommendation, and the recommendation will be formally and effectively considered in your supervisor’s decision.
 - “Provide Input” means that your supervisor may or may not take action based on the information, or informal recommendation or input, you provide and, if action is taken, your supervisor may or may not take the action recommended by your input.

Section 10 -- Working Schedule: Complete this section to best indicate the typical work schedule for this position. Does the position **require** working non-standard work hours; that is a schedule that does not work Monday – Friday, 8 a.m. – 5 p.m.? If so, indicate the position’s schedule in the first box. Is travel **required** for this position? If so, describe the typical travel, including locations(s), frequency, method (e.g. car, bike, walk) and time required for the travel. In the table, check the box indicating the frequency for each type of work schedule indicated. If the schedule does not apply to this position, check the box under “N/A”.

Section 11 -- Employee Qualifications: The incumbent should complete this section, if the position is filled; if the position is vacant, leave this section blank. List previous relevant work experience, training or education including any degrees, certifications, or licenses that are required or preferred for the employee to perform the key functions of this position. Indicate, by checking the appropriate box, whether the certification, license, etc., is required or desired, and why such certification, license, etc. is needed.

Section 12 -- Employee Signature: If the position is vacant, indicate “N/A”. If the position is filled, the employee must enter his name and the date here and forward via email to the supervisor, indicating that to the best of their knowledge, the form is complete and accurate.

Section 13 -- Supervisor Input: Supervisors are required to review the form as filled out by their employee to ensure that it is accurate and complete. A checklist is provided that will assist the Supervisor in their review of the form. If the form is inaccurate or incomplete, the supervisor should discuss those elements with their employee. It is expected that, during the discussion, the supervisor and employee come to an agreement leading the employee to correct, enter or delete information, as appropriate. If either the employee or supervisor still have concerns after their agreement, they may contact their HRBP or Class Comp for assistance.

Supervisors are encouraged to provide any clarification in this section in order to better describe the position, work experience, and skills that are needed to perform the work.

Education/Training/Experience: Describe the number of years and type of work experience typically *required* for this position, and indicate why this experience is required. Describe the number of years and type of experience *preferred* for this position and indicate why. List the critical knowledge and skills required for this position. Indicate the type of formal education (e.g. degree) or training required and/or preferred for this position, and why the education is needed. Provide any additional information on the requirements for

this position and any additional training, certification or licensure requirements. Indicate whether it is required or desired and why such additional training is needed. Indicate if a Driver's License is required for this position (review the essential functions to determine whether it is required.) Do not copy and paste from the current classification specification.

Examples: Certification and registration as a Professional Engineer (PE) in the State of Oregon; fluency in a specific language; or a physical or mental attribute such as the ability to work in confined spaces or at extreme heights.

Organization Chart: Attach a current bureau organization chart that shows where this position fits in the organization. A hand-drawn sketch is fine, but it must show the relationship of this position to co-workers, the supervisor, other functional units and the bureau director. If more than one PD is being submitted at one time for a work unit, only one Organization Chart is needed, as long as all positions are shown on the Organization Chart.

Section 14 -- Approval Signatures After Supervisor Input: If the position is filled, ensure the employee signs the PD form. Then the direct supervisor and the HRPB must sign the form. In addition, if desired, a higher-level manager and/or the Division/Bureau Head may review and sign the form. The signatures connote that all parties have reviewed the contents and concur that the PD accurately and fully describes the assigned duties and requirements of the position. Review by the Division/Bureau head is optional depending on the position. As desired, any individual completing and/or reviewing this form should retain a copy for their files.