

**STATE OF NORTH CAROLINA
OFFICE OF STATE PERSONNEL**

Instructions for Completion of Position Description Form (PD-102R-92)

In State Government it is the responsibility of managers, administrators and supervisors to structure the organization, design positions and assign work to deliver program services in the most effective way. A vital part of this process is the preparation and use of position descriptions.

The **Position Description Form** is used by your department, your personnel office and the Office of State Personnel to obtain complete and factual information concerning the work assigned to positions. The form and these instructions have been designed with a format to enable and aid managers and supervisors in describing their subordinate positions, provide relevant and adequate information for the position classification process, and provide management with a tool which is invaluable in other management functions, including recruitment and selection, orientation, work planning, training and others.

General Instructions: First, please read the instructions completely and examine the blank form. Second, complete the identification information requested in Blocks 1-12 in the spaces provided. Next, describe the responsibilities and duties of the subject **position in your own words** in accordance with the specific instructions provided below for Preliminary Preparation and for Sections I, II, and III. It is essential that this information be complete and accurate.

Upon completion of the entire description, sign and date the form in the space provided in **Section IV, (Certification)**. If the position is established and filled, the description must be **reviewed with the employee** for his/her acknowledgment of it as a complete and accurate description of assigned responsibilities and duties, and signed by the employee in the space provided. Any differences should be resolved at this time. The form should then be referred to the higher levels of management for their review, approval and signature as further provided, or further clarification or correction if needed. Three copies of the form should be prepared. The original and one copy should be forwarded to your agency personnel office, and the third copy retained in your department files or as otherwise instructed.

Preliminary Preparation: The following Four Step Method has been designed to aid you in gathering reference materials and organizing the information you will need to describe the responsibilities and duties of the position:

1. **Review** available program data, work methods, existing work plans, procedural standards or guides, written instructions, etc., which are relevant to the position.
2. **Review** the organizational structure and determine how any changes have affected the position.
3. **Identify the major responsibilities** of the position. Responsibility is accountability for procedures, solutions, programs, services, and decisions.
4. **Define the duties** and tasks by which the responsibilities are carried out. Duties are the component elements or actions assigned to a position. Duties are made up of tasks. Tasks are the most basic element of work. A task can be defined as an action sequence to accomplish an objective.

WRITING THE DESCRIPTION: (Sections I through III)

I. Provide the information requested in this section in the spaces provided in Section I on the position description form.

- A. Primary Purpose of Organizational Unit:** Describe the purpose of the organizational unit. (Why it exists and its mission.)
- B. Primary Purpose of Position:** Provide a brief explanation which describes the primary purpose of the position. For supervisory positions, state the total number of employees for which the position is responsible. If supervision is over one or more organizational units, give the name of each unit head, and the titles and number of positions in each unit.
- C. Work Schedule:** State the normal work schedule of the position, (days and hours), and whether any shift or seasonal variances are required. If the position is supervisory, describe any shift operations directly supervised.

D. Change in Responsibilities or Organizational Relationship: For an existing position, provide a brief explanation of the basis and purpose of any change in responsibilities and/or reporting relationships since the previous description was prepared.

II. A. Description of Duties and Responsibilities: This section (II) comprises the main body of the position description in which you are to describe the responsibilities and duties of the position. Because the amount of information needed varies among positions, Part A on the form has been left open ended so that you may insert additional paper if needed. Use narrative statements to describe the responsibilities and duties. You may select one of the following two arrangements.

1. **Order of importance** - categorize, arrange and number the work by major responsibility in rank order of importance and describe the duties and tasks of each; or,
2. **Sequential order** - describe the position in terms of the sequences of the work. If this method is used, indicate with a number the relative rank order of importance of each responsibility, i.e., 1, 2, 3, etc., in the number column in the left margin).

Indicate on the form which arrangement you choose. Be sure to indicate the **percentage** of time (%) spent of each responsibility.

Place an asterisk (*) in the left margin by each **essential job function**. Essential functions are the fundamental job duties, meaning the position exists to perform the function; there is a limited number of employees among whom the performance of the function can be distributed; and/or the incumbent is hired for expertise or ability to perform the function due to its high specialization. The Americans With Disabilities act of 1990 (ADA) and associated Federal regulations protect qualified individuals with disabilities from discrimination in all areas of employment. To be considered qualified, an individual must be able to perform the essential functions of a position, with or without reasonable accommodation. It is imperative that essential functions be identified appropriately so that there is no discrimination against persons with disabilities.

For positions that supervise other employees, describe the responsibilities and duties covering the following:

1. **Planning:** Setting programmatic or operational goals.
2. **Organizing and Directing Work:** Involvement in directing day-to-day operations.
3. **Financial Management:** Determining budgetary requirements and managing operational budgets.
4. **Review:** Review of work for conformance with instruction and objectives of the organization.
5. **Supervision:** Describe the extent of involvement in:
 - Orientation, initial and on-going training
 - Work planning and performance review
 - Counseling and disciplining employees
 - Resolving grievances
 - Selection of employees
 - Salary recommendations
 - Designing positions and preparing descriptions
 - Equal Employment Opportunity programs
 - Other employee programs

II. B: Other Position Characteristics: Following is a list of instructions concerning other important position characteristics which are either involved in the work process, prescribe requirements or controls concerning the performance of work, or relate to conditions of work. Explain each separately in the spaces provided in Section II B. on the form, considering only the essential functions of the position.

1. **Accuracy Required in Work:** Describe the nature and degree of accuracy required in the work.
2. **Consequence of Error:** Describe the greatest potential loss, harm or effect upon the organization, the State or the public should error occur in the work.

3. **Instructions Provided to Employee:** Describe the type of instructions which are provided and the extent to which they are verbal or written, or detailed or general.
4. **Guides, Regulations, Policies and References Used by Employee:** List the regulations, laws, rules, policies, procedural manuals or written operational directives which guide the work of the employee or are available for reference.
5. **Supervision Received by Employee:** Describe when, how, and for what purpose the work is reviewed or checked, whether by observation while in progress, or upon completion.
6. **Variety and Purpose of Personal Contacts:** Identify the various types and purposes of contact with other persons and provide examples of the more difficult or sensitive problems or issues which must be discussed and resolved, negotiated or enforced.
7. **Physical Effort:** Describe and quantify the type of physical effort which is required in doing the work, its frequency of occurrence and duration.
8. **Work Environment and Conditions:** Describe the facility or environment in which work is performed. Describe also any confining or constraining conditions, the extent to which the employee is exposed to outdoor elements, to any irritants or potential natural or created hazards, distressing events or potentially harmful actions from others. State what safeguards are in place or available to relieve or minimize hazards.
9. **Machines, Tools Instruments, Equipment and Materials Used:** List the primary tools, instruments and equipment, which the employee must be able to use to accomplish the work.
10. **Visual Attention, Mental Concentration and Manipulative Skills:** Identify the work processes which require visual attention, mental concentration, and any accompanying manipulative skills (use of fingers, hands or feet) required to accomplish the work. Explain how frequently such effort is required and its duration.
11. **Safety for Others:** Identify and hazards or work procedures which could be potentially harmful to others and what precautions and rules must be followed to prevent such occurrences..
12. **Dynamics of Work:** Describe and explain the nature, extent, frequency and type of changes which impact upon the work, and the cause or sources of such changes. If the position is supervisory, describe the degree of responsibility for assigning and implementing such changes. (Changes in technology, procedures, policies, seasonal change, etc., should be included.)

III. Knowledge, Skills & Abilities and Training & Experience Requirements:

Considering only the essential functions of the position, address the following statements and questions concerning the beginning or entry, **(A)** Knowledge, Skills and Abilities, and **(B)** Training and Experience Requirements. Do not consider duties which a new employee would be trained on-the-job to perform.

- A. List all of the Knowledge, Skills, and Abilities essential to perform the work at the beginning or entry level. Include any physical abilities required.
- B. Training and Experience
 1. State the minimum level of formal training necessary to aid a person in developing the entry knowledge, skills and abilities. Please specify area(s) of study and courses, if possible.
 2. Would this formal training fully prepare an individual for entry into this position? If not, what type(s) of other training and/or experience (consider paid work, volunteer work, or other applicable life experience) would be necessary in addition to the formal training?
 3. What types(s) of training and/or experience (paid work, volunteer work, etc.) might be substituted as being equivalent to the formal training?
- C. Is a license or certification required by statute to perform the duties of this position? If so, describe, and identify the statute.

IV. Certification: Refer to Page 1, General Instructions.