Clark University

Position Description Questionnaire

Training Session

September 14, 2022

Segal

Agenda

Project Introduction

Introduction to Position and Job Descriptions

Important Considerations
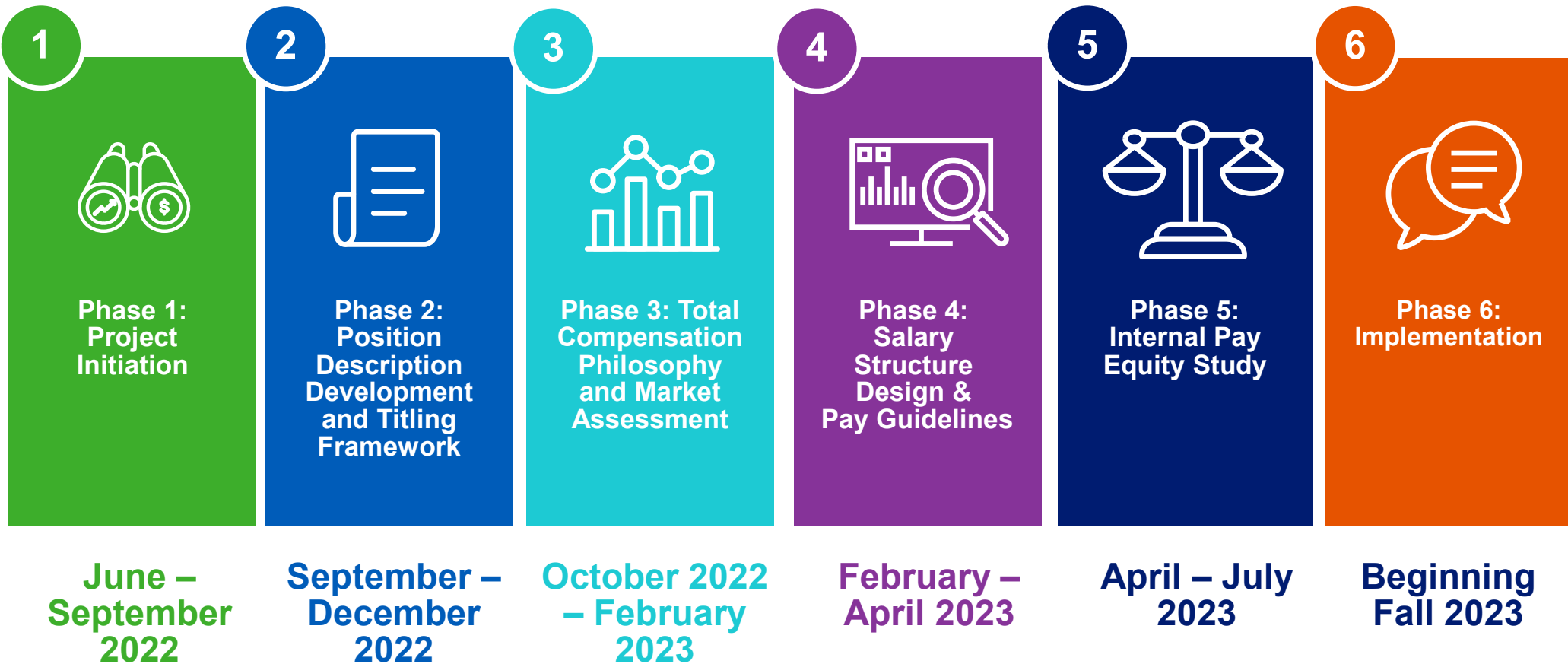
Overview of the PDQ

PDQ Review Process

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Project Introduction

Project Introduction
Project Phases and Estimated Timing

1

Phase 1: Project Initiation

June – September 2022

2

Phase 2: Position Description Development and Titling Framework

September – December 2022

3

Phase 3: Total Compensation Philosophy and Market Assessment

October 2022 – February 2023

4

Phase 4: Salary Structure Design & Pay Guidelines

February – April 2023

5

Phase 5: Internal Pay Equity Study

April – July 2023

6

Phase 6: Implementation

**Beginning Fall 2023**

Project Introduction
Key Project Deliverables

- **Total Compensation Philosophy:** An updated vision and strategy developed through the engagement about how, going forward, pay and its administration need to support the attraction/retention/career development of employees as well as the operational and financial realities of Clark.

- **Updated Staff Job Descriptions:** Development of current and accurate job descriptions, using Position Description Questionnaires (PDQs) as the foundation.

- **Competitive Market Assessment:** Identification of the appropriate labor market(s) by employee level and/or function for market data comparisons; and conducting a variance analysis to reflect the level of market competitiveness in aggregate, by job/rank, and by incumbent.

- **Salary Structures/Pay Ranges:** Salary structure and ranges tied to desired pay positioning, with a revised job evaluation approach and assignment of jobs to the structure.

- **Pay Administration Guidelines:** Policies for managing compensation to help ensure internal equity and consistent application of the guidelines across the institution.

- **Internal Pay Equity Study:** Providing an understanding of the impact that gender or race/ethnicity may have on compensation and the extent to which a systemic bias in pay may exist.

- **Implementation and Communication Strategy:** A high-level implementation plan, as well as the development of specific rollout materials, for the revised compensation program describing key work steps, timing, roles and responsibilities.

Introduction to Position and Job Descriptions

Introduction to Position and Job Descriptions
Difference Between a PDQ and Job Description

Position Questionnaire (PDQ)
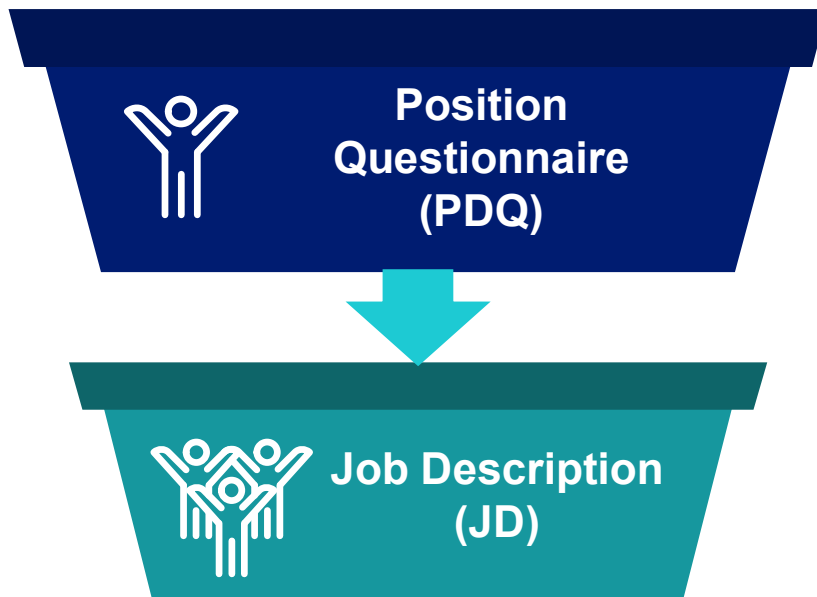
Job Description (JD)

- Is employee (position) specific
- Is used:
  - To describe individual responsibilities
  - As a starting point for job description development

- Is a broader generic description that takes into account one or more PDQs:
- Is used for
  - Creating job families
  - Benchmarking/market assessment
  - Developing career ladders

Introduction to Position and Job Descriptions
The Importance of Accurate Job Descriptions

Benchmarking
Assist in determining the appropriate market comparisons and competitive wages/salaries for jobs

Grades Assignment
Ensure jobs are assigned to the appropriate salary structure grades

Compliance
- Americans with Disabilities Act (ADA)
- Equal Employment Opportunity and Affirmative Action (EEO/AA)
- Fair Labor Standards Act (FLSA) (Salaried or Hourly and eligible for overtime)

Internal Equity
Ensure employees with comparable responsibilities, skills, and knowledge are paid similarly

Performance Discussions
Promote a clear, shared understanding of a job's major responsibilities and clarity in expectations and performance standards

Recruiting and Promotion
Facilitate development of job postings that accurately reflect a job's major responsibilities, help identify the most qualified candidates, and provide new incumbents with a clear understanding of the job

Career Development
Facilitate an understanding of job hierarchies, which allows and encourages employees and managers to share how they can create a career plan together

Introduction to Position and Job Descriptions
Benefits of the Position Description Questionnaire

The Position Description Questionnaire is developed in a format that:

Is easy to complete by employees

Is not highly dependent on individual writing styles and blends structured and narrative sections

Collects the same type of information for all classifications in a clear, consistent format

Can be used on an ongoing basis when positions change significantly, new classifications are introduced, or revisions to or new job descriptions are necessary

Clark HR, with the help of Segal, will ensure all critical information is captured to support the development of current and accurate Job Descriptions
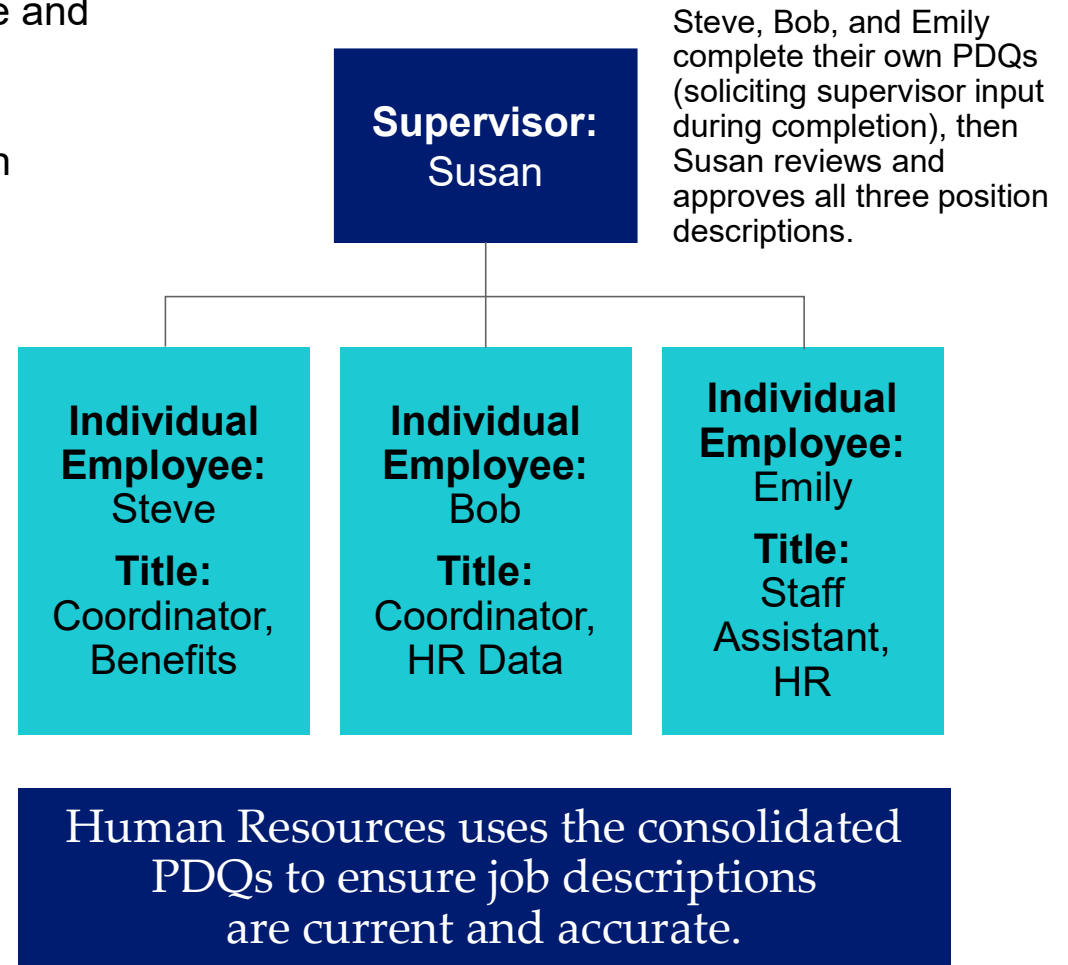
Segal/Clark HR will use the information gathered from the PDQs to develop accurate job descriptions, a job leveling framework, and titling guidelines.

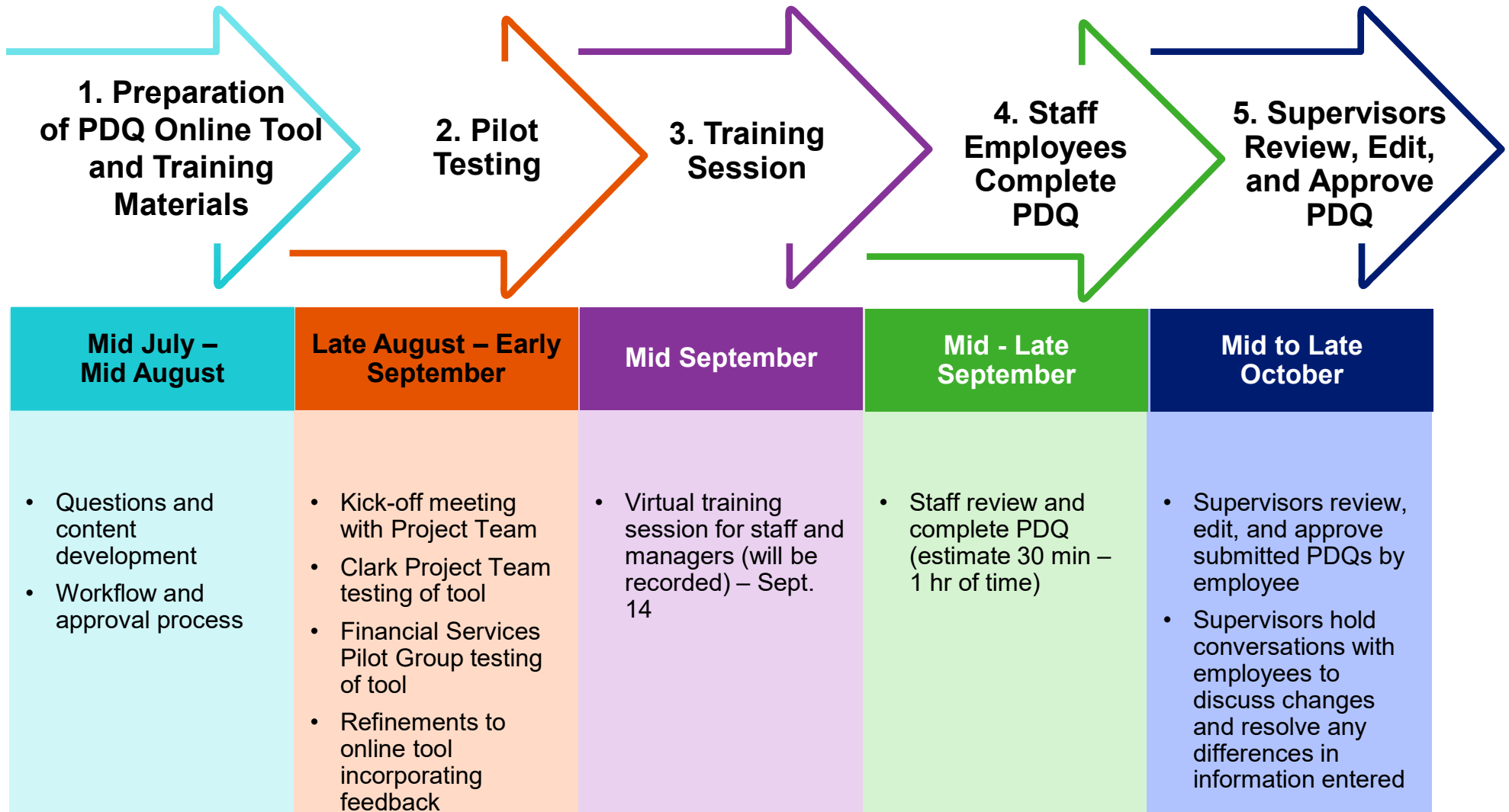# Introduction to Position and Job Descriptions
Roles in Completing PDQs

- **Individual Staff employees** are responsible for ensuring that:
  - Position description questionnaires are complete and submitted on time
  - Reference documents (e.g., job description, performance review document) are utilized when available to ensure completeness of PDQs

- **Supervisors** are responsible for:
  - Ensuring all position description questionnaires within their department have been completed and are accurate
  - Signing off on their direct reports completed questionnaires
  - Ensuring that employee and supervisor have consensus on the final PDQ

- **Human Resources** will be responsible for ensuring that:
  - Position description questionnaires have been reviewed and discrepancies have been addressed
  - PDQs are consolidated for different employees in the same jobs

Illustrative Example

Supervisor: Susan

Steve, Bob, and Emily complete their own PDQs (soliciting supervisor input during completion), then Susan reviews and approves all three position descriptions.

Individual Employee: Steve
Title: Coordinator, Benefits

Individual Employee: Bob
Title: Coordinator, HR Data

Individual Employee: Emily
Title: Staff Assistant, HR

Human Resources uses the consolidated PDQs to ensure job descriptions are current and accurate.

Segal

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Introduction to Position and Job Descriptions
Detailed PDQ Completion Process and Timeline

1. Preparation of PDQ Online Tool and Training Materials	2. Pilot Testing	3. Training Session	4. Staff Employees Complete PDQ	5. Supervisors Review, Edit, and Approve PDQ
Mid July – Mid August	**Late August – Early September**	**Mid September**	**Mid - Late September**	**Mid to Late October**
• Questions and content development • Workflow and approval process	• Kick-off meeting with Project Team • Clark Project Team testing of tool • Financial Services Pilot Group testing of tool • Refinements to online tool incorporating feedback	• Virtual training session for staff and managers (will be recorded) – Sept. 14	• Staff review and complete PDQ (estimate 30 min – 1 hr of time)	• Supervisors review, edit, and approve submitted PDQs by employee • Supervisors hold conversations with employees to discuss changes and resolve any differences in information entered

Clark HR, in partnership with Segal, will conduct the job description development and any job title consolidation.

Important Considerations

Important Considerations

When completing the PDQ questionnaire, make sure to:

- Describe the position, not your personal characteristics

- Describe the current position content, not anticipated changes or outdated functions no longer in use

- Not include temporary assignments/job responsibilities that will not be a permanent part of the job's responsibilities going forward

- Avoid jargon, spell out acronyms, and define technical terms (when necessary)

- Use position titles or roles when referring to others at Clark University
  - Use names of people only when specifically requested

- Save your progress if you intend to continue the PDQ at another point in time

- Not alter employee PDQ submissions (if you are a supervisor) or supervisor comments (if you are an employee completing a PDQ)

You may be asked to review and discuss the content of your
draft position description with your supervisor.

Important Considerations
What to Include and Not Include?

Include	Do Not Include
✓ Essential and regularly required responsibilities	✗ One time, short-term assignments
✓ Expected outcomes within essential functions	✗ Exhaustive list of tasks, and/or details on "how" work is done
✓ Normal expectations of a fully competent person, meeting all job requirements	✗ Tasks or expectations designed around an individual (e.g., performance, professional interests, etc.)
✓ Clear, accurate descriptions	✗ Acronyms without explanation, misleading or vague descriptions

For example, instead of writing…

"Enters the following information into system screens ABC and XYZ: Employee Name, Address, Phone Number…"

You would write…

"Enters required data into HRIS module and audits entries for completeness and accuracy"

Important Considerations
Accessing the PDQ Tool

On September 14th, 2022 all Clark University full-time and part-time administrator and staff employees will receive an email with a link to access and complete the PDQ.

All employees should complete their PDQ by **October 7, 2022**. Supervisors should complete their review by **October 28, 2022**.

Overview of the PDQ

Overview of the PDQ
Position Description Sections

1. Purpose

2. PDQ Participant

3. Demographics

4. Job Summary/Major Function & Primary Job Responsibilities

5. Education

6. Work Experience

7. Reporting Relationships

8. Human Collaboration

9. Freedom to Act/Impact of Action

10. Problem Solving

11. Knowledge, Skills and Abilities

12. Fiscal Responsibility

13. Work Environment

14. Physical Requirements

15. Special Conditions of Employment for the Position

16. Additional Comments

17. Acknowledgement of Completion

Overview of the PDQ
Saving Your PDQ

- If at any point while completing the survey you want to save the results and continue the survey at some other point in time, please click on the "**click here to save and continue survey later**" button located at the very top of the screen

Overview of the PDQ
1. Purpose

- Explains the **purpose** and intent of this questionnaire

- Provides **instructions** on how to complete the questionnaire

- Provides an **email address** for any questions about the questionnaire

Purpose of this Questionnaire

Clark University has engaged Segal (a nationally recognized Human Resources consulting firm) to assist in efforts to design an updated job classification and competitive compensation structure for full-time Administrators and Staff positions.

As part of this process, we request your assistance in completing this online Position Description Questionnaire (PDQ) to ensure we have the most up-to-date, clear, and accurate information for every full-time Administrator and Staff position. The people who best know the work involved in any given job are those that are closest to the job – you and your supervisor. It is also true that jobs often experience "drift" in what work is actually being performed vs. what is intended. This process may also help identify where the actual day-to-day reality of a job has changed over time.

Your response to this questionnaire (and subsequent supervisor review) will help create a better understanding of positions across various areas, which in turn, will enable the University to:

- Create specific position descriptions that define more accurately the scope, output, impact, and necessary minimum requirements for each position.
- Update the University's job descriptions to be current and inform the development of job families (see chart below).
- Develop a job titling protocol so that titles are used consistently and appropriately across the campus community.
- Compare salaries of positions at Clark University to those at comparable institutions and organizations in order to conduct an overall marketplace assessment of current salary bands compared to a set of benchmarked higher education institutions.
- Accurately assign positions to salary grades or bands so that positions with similar impact, scope, and required knowledge are in the same salary grades or bands, unless market dictates otherwise.

Process Overview:

```
              Job Families
                   |
                  Job
              Description
             Specifications
      ┌────────┬────┴────┬────────┐
  Individual  Individual Individual Individual
     PD          PD        PD         PD
```
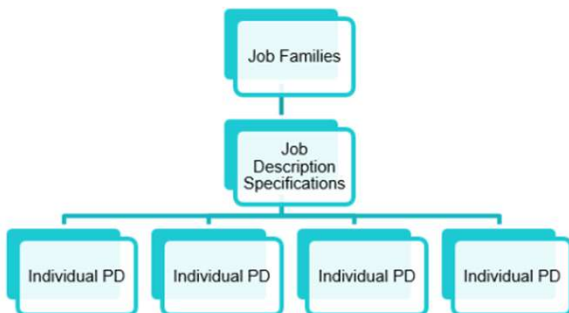
This questionnaire does not measure your performance but focuses on the key job responsibilities and requisite skills, knowledge and abilities to perform the work.
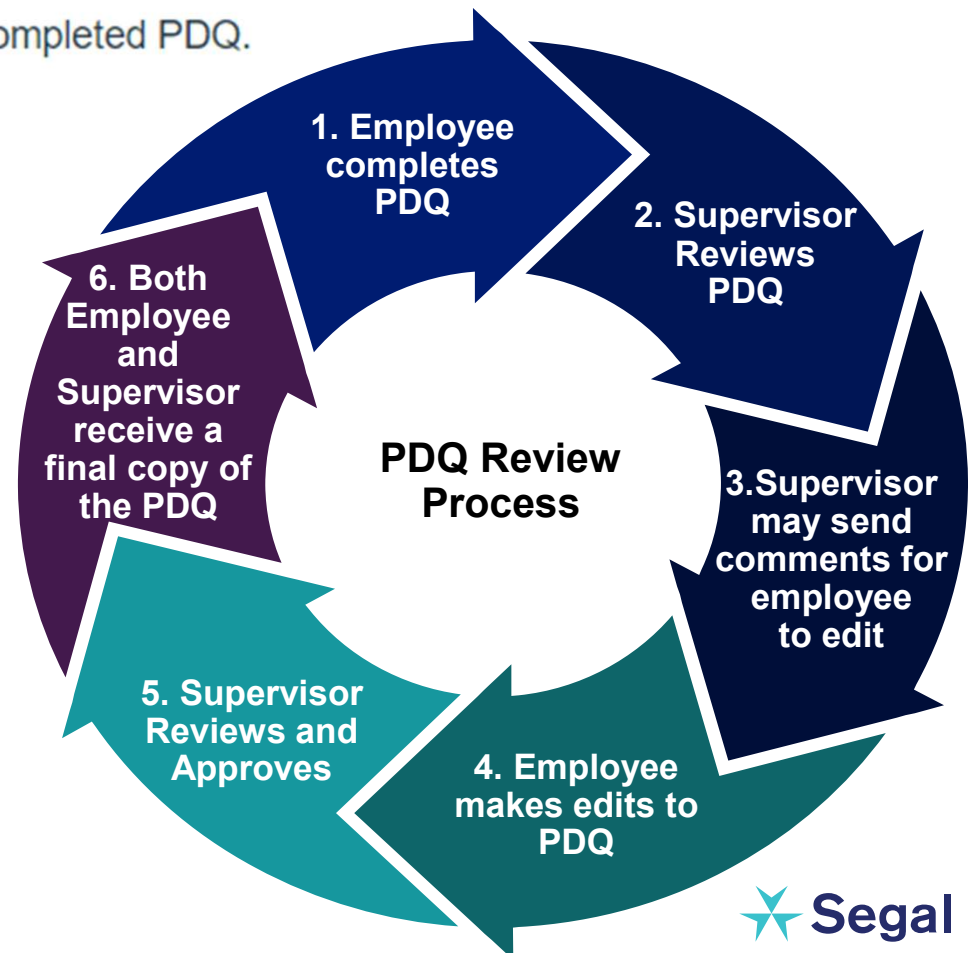
Overview of the PDQ
2. PDQ Participant

- Please select "Yes, I am a supervisor conducting a review of a completed PDQ" when reviewing PDQs completed by those who you supervise.

- Please select "No, I am an employee completing a PDQ" when completing the PDQ for your position.

1. Are you a supervisor reviewing the responses of an employee? *

○ Yes, I am a supervisor conducting a review of a completed PDQ.

○ No, I am an employee filling out a PDQ.

PDQ Review Process

1. Employee completes PDQ

2. Supervisor Reviews PDQ

3. Supervisor may send comments for employee to edit

4. Employee makes edits to PDQ

5. Supervisor Reviews and Approves

6. Both Employee and Supervisor receive a final copy of the PDQ

Overview of the PDQ
3. Demographics

- Please enter your employee ID.

- Please review the accuracy of the provided **demographics** information.

Demographics

Confirm that all information below is correct.

Employee Name

Position ID

Position Title

Division

Department

Employee Email

Supervisor Name

Supervisor ID

Supervisor Title

Supervisor Email

If the information above is incorrect, please indicate any necessary changes.

✦ Segal
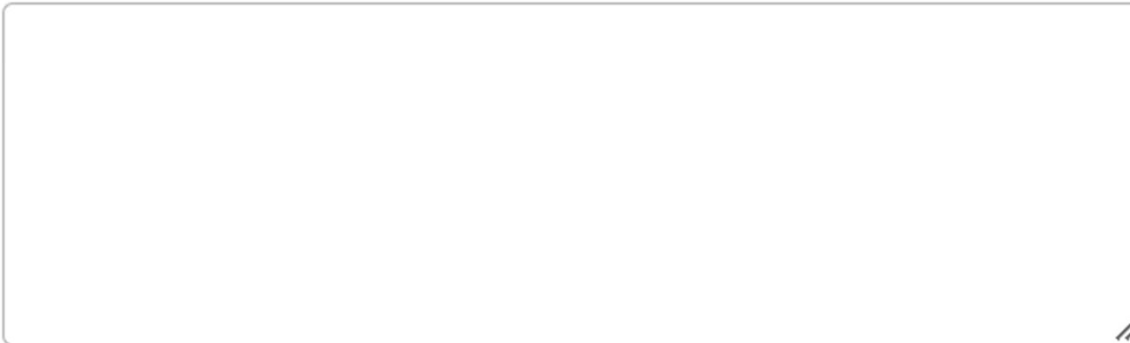
Overview of the PDQ
4. Job Summary/Major Functions & Primary Job Responsibilities

- This is a brief **Job Summary** of the position's responsibilities at Clark — an "elevator speech"
  - You meet an old friend in an elevator. How would you describe your position in such a brief time?
  - Sometimes this is easier to draft after you have finished the rest of the PDQ
  - If you need help, you can refer to your current job description (if available) or your performance review document

Job Summary/Major Function

Please summarize the primary purpose of your job in 3 – 4 sentences, briefly but specifically. *

Example: An Administrative Assistant might respond, "Performs a variety of administrative functions. Schedules appointments, provides information to the college community and to the public. Composes memos, transcribes notes, and researches and creates presentations. Generates reports, handles multiple projects, and prepares and monitors invoices and expense reports. May assist with compiling and developing the annual budget."

Overview of the PDQ
4. Job Summary/Major Functions & Primary Job Responsibilities

- **Primary Job Responsibilities** are those major on-going responsibilities/end results that must be achieved in the position. This is the heart of the PDQ as it outlines what the position is ultimately accountable **for—what, how, and why, in progressive order of importance.**
  - Describe up to 8 primary job responsibilities (not tasks) the position must achieve starting with the most important
  - Write statements so that someone unfamiliar with the position can understand what the position does
  - Highlight "what you do" instead of "what gets done"
  - Focus on responsibilities that take >5% of time
  - Ideally, these tasks would total 80% - 90% of your time
  - Other duties as assigned will represent 10% of your time

	Primary Job Responsibilities	Estimated % of Time	
1			1

For a sample list of action words, please see the Appendix of this document or utilize the glossary link included in the questionnaire.

Overview of the PDQ
4. Job Summary/Major Functions & Primary Job Responsibilities

Describing Primary Responsibilities Clearly

Use the following pattern to write a primary responsibility statement:

Action Word ➕ **Subject** ➕ **Activities**

For example:

Action Word   **Subject**

Reviews and validates transactions by ensuring completeness and accuracy of the account balances.

Activities

Appendix Sample
Glossary of Action Verbs

- **Adjust**—Bring to more satisfactory state; change to enhance a situation.

- **Administer**—Exercise and implement control over the performance of specific operations, approved plans, or established policies within the scope of limited and well-defined authority.

- **Advise**—Give information or opinion pertinent to a probable

- **Analyze**

- **Arrange**
  make preparations or plan.

- **Assist**—Take an active part or give support in performing a function.

- **Balance**—Arrange so that one set of elements exactly equals another.

- **Calculate**—Work out by mathematical computation.

- **Check**—Compare with a source, original, or authority.

- **Compile**—Put together a series or group of facts or figures from somewhat related sources into a related whole; usually used in the sense of making a report.

- **Compose**—Form by putting together; formulate or write.

- **Conduct**—Exercise leadership in a project or
  authority.

- **Counsel**—Give advice and guidance to another.

- **Demonstrate**—To show clearly; illustrate or explain with many examples.

- **Develop**—Advance programs, planning or personnel capabilities to higher state.

- **Direct**—Authoritatively define, regulate, or determine the activities of subordinate organizational units to achieve predetermined objectives.

For a sample list of action words, please see the Appendix of this document or utilize the glossary link included in the questionnaire.

Overview of the PDQ
4. Job Summary/Major Functions & Primary Job Responsibilities

Examples

Maintain audio-visual equipment inventory by:

- Tracking borrowed equipment
- Entering new equipment into the equipment log
- Ensuring the accuracy of the equipment database

Provide technical IT support to the organization by:

- Responding to telephone calls, email, and personnel requests for technical help
- Troubleshooting user computer problems by documenting, tracking, and monitoring the problem to ensure a timely resolution

Prepare monthly financial reports by:

- Collecting and verifying financial data
- Entering current data into spreadsheets
- Running analysis reports
- Consolidating final figures into standard monthly financial reports

Identify funding opportunities for the organization by:

- Cultivating potential new donors from prospect pool of contacts
- Attending networking functions including dinners, receptions, and other special events

Overview of the PDQ
5. Education

- Select the **minimum education level** and **field of study** that best describes the **required** and **preferred** level of education to perform the job

- Include any other relevant information, such as field of study or licensures or certifications that may be required to perform the job

- List any license or certifications required for your position as well as those that are preferred

Note: The required minimum level of education may or may not be the same as your individual level of education, either currently or when you started. *

	High School diploma or G.E.D. equivalency	6 months+ training beyond High School	Bachelor's Degree	Master's Degree	Doctoral Degree
Required	○	○	○	○	○
Preferred	○	○	○	○	○

Field of study

Please describe additional information required or preferred for the position at the point of hire (such as licensure, certifications, etc.). Please write out the names of certifications or licensures and do **not** abbreviate.

Required

Preferred

Overview of the PDQ
6. Work Experience

- Select the duration of time that best describes the **minimum required** and **preferred position-related work experience** to perform the job

- Include any other relevant information

Note: The required minimum level of position-related experience may or may not be the same as your individual level of position related experience, either currently or when you started. *

	No experience	Less than 1 year	1 – 3 years	3 – 5 years	5 – 7 years	7 - 9 years	9+ years	Other (please explain below)
Required	○	○	○	○	○	○	○	○
Preferred	○	○	○	○	○	○	○	○

If you selected "Other," please explain.

Please describe the type of work experience required; if not applicable enter N/A:

Overview of the PDQ
7. Reporting Relationships

- Confirm whether the position has **supervisory responsibility**
  - Indicate the Job Titles of employees directly supervised, if applicable
  - Indicate the Headcount of employees directly supervised, if applicable

Reporting Relationships

Indicate your job's reporting relationship to others by identifying direct reports to your job. *Note: Supervision is defined as prioritizing and assigning work, conducting performance evaluations, ensuring staff are trained, and making hiring, termination, and disciplinary recommendations.*

Do you supervise employees? *

- ⊙ Yes
- ○ No

Appointment Type and FTE of Employees Supervised

Direct Reports

	Job Title(s)	Headcount
Salaried Employees		
Hourly Employees		
Student Workers		
Other (e.g., temporary employees, contractors)		

Overview of the PDQ
7. Reporting Relationships

- Confirm the highest level of **supervisory responsibility**

Management and Supervisory Responsibilities:

Indicate the type and scope of supervisory responsibilities of this position. **Check the highest level of responsibility.** NOTE: This refers to supervision of other employees. *

☐ **Not responsible for supervising others.**

☐ **Provides lead work, advises and/or guides students.** May organize, set priorities, schedule and review work, may interview and make recommendations on hiring, and provide input into performance reviews. May have responsibility for making decisions on hiring, termination and pay adjustments.

☐ **Guides work of others who perform essentially the same work.** May organize, set priorities, schedule and review work, may interview and make recommendations on hiring, and provide input into performance reviews. Does not have responsibility for termination or making pay decisions.

☐ **Supervises work of others, including planning, assigning and scheduling work, reviewing work and ensuring quality standards, training staff and overseeing their productivity, and signing employee(s) performance evaluation.** May have responsibility for making decisions on hiring, termination and/or pay adjustments.

☐ **Supervises work of other supervisors/managers, including planning, assigning, scheduling and reviewing work, ensuring quality standards.** Is responsible for hiring, terminating, training and developing, reviewing performance and administering corrective action for staff. Plans organizational structure and job content.

☐ **Executive Level Leadership.** Supervises work of other directors, including planning and reviewing work.

Overview of the PDQ
8. Human Collaboration

- Select the nature of Human Collaboration with others required in this position
  - Indicate whether this occurs internally, externally, or both

Human Collaboration

This factor measures the job requirements of personal interaction with others outside direct reporting relationships as well as the impact the job has on organizational, departmental or unit objectives, the output of services, or employee or customer satisfaction.

Interaction may include:
- The general public
- Volunteers
- Other divisions within the organization and its branches including boards and commissions
- Other governmental organizations or officials
- Vendors, contractors, suppliers of products/services

Please indicate the level that best describes your job. *

☐ Work requires **regular interaction** involving exchange and receipt of information.

☐ Work may require providing **advice to others outside direct reporting relationships** on specific problems or general policies. Contacts may require the consideration of different points of view to reach agreement. Elements of persuasion may be necessary to gain cooperation and acceptance of ideas.

☐ Interactions may result in **decisions regarding implementation of policies**. Contact may involve support of controversial positions or the negotiation of sensitive issues or important presentations. Contacts may involve stressful, negative interactions with the public requiring high levels of tact and the ability to respond to aggressive interpersonal interactions.

☐ Interactions and communications may result in **recommendations regarding policy development and implementation**. May also evaluate customer satisfaction, develop cooperative associations, and utilize resources to continuously improve customer satisfaction.

☐ Communications and discussions result in **decisions regarding policy development and implementation**. Interaction with others outside the organization requires exercising participative management skills that support team efforts and quality processes.

Indicate the nature of collaboration and/or service to others required by this position and whether this occurs internally (with others at the organization) or externally (with the general public, vendors, media, other organizations, etc.)
Check only one box per type of collaboration/interaction *

	Internal Only	External Only	Both Internal and External	N/A
Exchange routine, factual information and/or answer routine questions.	○	○	○	○
Exchange detailed information or resolve varied problems.	○	○	○	○
Access and/or work with sensitive and/or confidential information.	○	○	○	○
Identify needs/concerns of others, determine potential solutions, resolve or redirect appropriately.	○	○	○	○
Persuade, gain cooperation and acceptance of ideas or collaborate on significant projects.	○	○	○	○
Resolve conflict, negotiate or collaborate on major projects.	○	○	○	○
Handle sensitive issues and facilitate collaboration at the highest level.	○	○	○	○
Develop and maintain relationships with key contacts to enhance workflow and work quality.	○	○	○	○

Overview of the PDQ
9. Freedom to Act/Impact of Action

- Indicate the level of independence this position has in conducting work

Freedom to Act/Impact of Action

Indicate your position's general degree of independence of action.

This two-dimensional factor considers:
1. The extent this position is free to act in the absence of supervision or standard operating policies or procedures; and
2. The degree to which achieving or mishandling of the situation by this position could affect financial, public, or employee relations aspects of the organization.

Conditions or limitations on independence may include: supervisory control, the nature of the work, established procedures or lack thereof, legal constraints, etc.
*

○ You normally perform assignments after receiving detailed instructions as to methods, procedures, and desired end results with little room for deviation. The immediate supervisor may, at times, provide close and constant review.

○ You normally perform assignments after receiving general instructions as to methods, procedures, and desired end results. There is some opportunity for discretion when making selections among a few, easily identifiable choices. The assignment is usually reviewed upon completion.

○ You normally perform the job by following established standard operating procedures and/or policies. There is a choice of the appropriate procedure or policy to apply to duties. Performance reviewed periodically.

○ You normally perform assignments according to your own judgment, requesting supervisory assistance only when necessary. Special projects are managed with little oversight and assignments may be reviewed upon completion. Performance reviewed periodically.

○ You normally perform assignments within broad parameters defined by general organizational requirements and accepted practices. End results determine effectiveness of job performance.

Give at least one example of the effect of errors that could be made by someone in the current position: *

[ ]	Example 1:
[ ]	Example 2:
[ ]	Example 3:

Indicate the type of impact of the decisions typically made by this position. *

○ Decisions generally only affect your job or specific functional area.

○ Decisions may affect a work unit or area within a department; your job may contribute to operational decisions that affect the department.

○ Decisions have major implications on the coordination and operations of an area within a department; your job may contribute to important strategy, operations, and other decisions that affect the department.

○ Decisions have significant, broad implications for the operations of a division/entire University; your job contributes to decisions on the overall strategy and direction of the entire University.

Please provide additional information, if desired:

[   ]

Who is impacted by the actions of this position? *Check all that apply.* *

☐ Entire University   ☐ Donors and Alumni

☐ Functions across the University   ☐ Students/Parents

☐ Department   ☐ Other External Agencies and Institutions

☐ Direct team   ☐ No significant impact on anyone

☐ Vendors/Suppliers/Contractors

Overview of the PDQ
10. Problem Solving

- Indicate the typical nature of the problems encountered in this position on a regular basis.

- Consider problems and issues faced on a day-to-day basis as well as those which occur non-regularly. Do these problems differ in nature? Can they be solved with clear directions, or do they require training and critical and creative thinking?

Problem Solving

Indicate the nature of problems in carrying out this position. *

○ Problems encountered are routine, somewhat repetitive and generally solved by following clear directions and procedures.

○ Problems are varied, requiring analysis or interpretation of the situation. Problems are solved using knowledge and skills, and general precedents and practices.

○ Problems are highly varied, complex and often do not reoccur often; requires creative approaches to resolution. New concepts and approaches may have to be developed.

Please provide additional information, if desired:

Overview of the PDQ
11. Knowledge, Skills and Abilities

- Indicate the **knowledge, skills** and **abilities** required to effectively perform the primary job responsibilities of this position as well as the **proficiency** for each knowledge, skills and abilities

Knowledge, Skills, and Abilities

Please list at least three examples of knowledge, skills, and abilities, that are required for you to perform your daily work. *

Examples of Knowledge (such as computer programming languages or local laws, policies, and regulations):

1
2
3

Examples of Skills (such as public speaking or customer service):

1
2
3

Examples of Abilities (such as maintain confidentiality and work with protected individual data or track and organize financial statements):

1
2
3

Overview of the PDQ
12. Fiscal Responsibility

- Select the answer that reflects the level of **fiscal responsibilities** involved in this position

Fiscal Responsibility

Select the factor that measures the accountability and participation, if any, as it relates to the fiscal accountability for one's department or assigned area(s) of responsibility. *

- ○ Position has **no fiscal responsibility.**

- ○ May assist in the collection of data in support of recommendations for departmental budget allocations. May monitor division or program/promotional level budget and expenditures.

- ○ May be responsible for the billing, collection and/or accounting of funds. May be responsible for the handling and balancing of cash.

- ○ Is responsible for department-wide financial decisions. Assures that appropriate linkages exist between budget requests and departmental goals and objectives. Monitors budget plan and adjusts as necessary.

- ○ Assures that appropriate linkages exist between division and agency-wide budget, funding limitations and services levels, to meet specific division/departmental and organizational goals. Monitors progress toward fiscal objectives and adjusts plans as necessary to reach them. May prepare financial statements and budget reports.

Indicate the type and level of fiscal/financial responsibility of this position. *
If the type of fiscal/financial responsibility is not applicable to this position, please select N/A.

	With Unit/Dept	Within Division	Across the University	N/A
Monitor, inform, report	○	○	○	○
Reconcile and/or move funds within budgets	○	○	○	○
Draft/develop budgets	○	○	○	○
Approve within budgets	○	○	○	○
Approve budget exceptions	○	○	○	○

Overview of the PDQ
13. Work Environment

- Indicate the level of frequency the job is exposed to certain **work environments**

Work Environment

Does the position function under typical office environment work conditions? *

○ Yes

◉ No

Please check the level of frequency that best describes the position's exposure to the following working conditions. Check only one box per environmental condition.
*

		Frequency		
	Never	Occasionally (up to 3 hours/day)	Frequently (3 – 6 hours/day)	Constantly (6 – 8 hours/day)
Outdoor Environment: The position requres you to work outdoors and you may not be protected from weather conditions.	○	○	○	○
Extreme Cold: In carrying out your position, you experience temperatures typically below 32° for more than an hour.	○	○	○	○
Extreme Heat: In carrying out your position, you experience temperatures above 100° for more than an hour.	○	○	○	○
Noise: In carrying out your position, there is a noise-level that causes you to shout in order to be heard above the noise level.	○	○	○	○
Hazards: This position includes a variety of physical conditions, such as proximity to moving mechanical parts, moving vehicles, electrical current, working on scaffolding and high places, or exposure to chemicals.	○	○	○	○
Infectious Diseases: This position is frequently exposed to contagious or infectious diseases.	○	○	○	○
Atmospheric Conditions: This position is exposed to conditions that affect the respiratory system, such as fumes, odors, dusts, mists, gases, or poor ventilation.	○	○	○	○
Close Quarters: This position frequently requires you to work in crawl spaces, shafts, manholes, sewage and water line pipes, and other areas that could cause claustrophobia.	○	○	○	○
Restricted Access: This position is permitted access to utility plants or other facilities which access is restricted in order to protect the health or safety of the public.	○	○	○	○
Confidential Information: This position accesses personal information about employees or members of the public including Social Security numbers, dates of birth, driver license numbers, medical information, personal financial information, or criminal background information.	○	○	○	○
Information Systems: This position has control over, or access to, information technology systems that would allow the person to harm the information technology systems or the information contained in the systems.	○	○	○	○
Other: Please describe below.	○	○	○	○

Overview of the PDQ
14. Physical Requirements

- Indicate the level of frequency that the itemized **physical demands** are required by the job

Physical Requirements

Does the position require any additional physical requirements to perform the role? *

◉ Yes
○ No

Please check the level of frequency that best describes the physical demands that are required for you to perform the job duties. Do not consider aspects of the job for which adjustments or accommodations can be made.
For each physical activity below, check the box that applies to your job.

For example: It would be considered a reasonable accommodation if you are not able to lift a box and lifting a box is required, but a colleague is able to lift it for you. However, if the primary duty in your job is moving boxes, an accommodation might not be feasible. Check "never" if you do not feel the physical demand is a required component of performing the job. *

	Never	Occasionally (up to 3 hours/day)	Frequently (3 – 6 hours/day)	Constantly (6 – 8 hours/day)
Sitting	○	○	○	○
Repetitive hand motion (such as typing)	○	○	○	○
Repetitive foot motion (such as using foot controls)	○	○	○	○
Hearing, listening	○	○	○	○
Talking	○	○	○	○
Standing	○	○	○	○
Walking	○	○	○	○
Bending	○	○	○	○
Twisting	○	○	○	○
Stooping	○	○	○	○
Climbing stairs	○	○	○	○
Climbing ladders	○	○	○	○
Kneeling, squatting	○	○	○	○
Crouching	○	○	○	○
Crawling	○	○	○	○
Balancing	○	○	○	○
Reaching overhead	○	○	○	○
Pulling, pushing	○	○	○	○
Shoveling	○	○	○	○
Lifting – up to 20 pounds	○	○	○	○
Lifting – up to 50 pounds	○	○	○	○
Lifting – over 50 pounds	○	○	○	○

Overview of the PDQ
15. Special Conditions of Employment for the Position

- Indicate whether there are any other working conditions of employment for this position

Special Conditions of Employment for the Position

If this position requires additional checks or licenses, please check the appropriate box(es).

- ☐ **On-call rotation duties:** Positions that require employees to be available during on-call shifts.

- ☐ **DMV check:** Positions that drive Clark University owned or rental transportation for business purposes.

- ☐ **Some evening and weekend work hours.**

- ☐ **Background Check or Fit for Duty Test:** Positions where continued employment is contingent upon passing a comprehensive background check or fit for duty test .

- ☐ **Occupational license or certification:** Positions that require licenses for the job, such as for Trades positions. Please list.

If you selected Occupational license or certification above, please list (do not use acronyms or abbreviations):

Overview of the PDQ
16. Additional Comments

- **Examples of additional information include: unusual circumstances, seasonal nature, or anything else to help the reader understand the position better**

Additional Comments

Please describe as clearly and concisely as possible any additional information that would be important to fully understand the roles, responsibilities, nature and scope of your position.

Overview of the PDQ
17. Acknowledgement of Completion

- Indicate the date and that you believe your responses are an accurate representation of your responsibilities

Acknowledgement Of Completion

Please sign below and send to Human Resources:

I believe this is an accurate representation of the responsibilities of my position

Completed by *

Date (mm/dd/yyyy) *

PDQ Review Process

PDQ Review Process
Employees and Supervisors

Employees	Supervisor
✓ Adds position content and completes the submission	✓ Reviews the submitted PDQ
✓ An electronic copy of the PDQ will be sent to the employee	✓ If necessary, asks the employee to make updates by providing comments in the PDQ
✓ An electronic copy of the PDQ will also be sent to the Supervisor for review	✓ Employee revises the PDQ and resubmits for approval. Supervisor approves the revised PDQ
✓ If necessary, the employee makes updates based on Supervisor's comments	✓ An electronic copy of the PDQ is sent via email to the Supervisor
	✓ HR will download all completed PDQ's and review

Important Note…

The PDQ is an Employee form; its purpose is to collect data about a position from the incumbent.

Supervisor's Note…

Supervisors won't change an employee's PDQ. They will review and provide comments.

PDQ Review Process
Beginning Review

- The listed supervisor on the drafted PDQ will receive an automated email from SurveyGizmo <noreply@alchemer.com> asking to review the employee's submission.

- To begin the review, please select "Yes, I am a supervisor conducting a review of a completed PDQ" when reviewing PDQs completed by those who you supervise.

  Please note that the survey will be sent to you with the answer filled in "No, I am an employee filling out a PDQ." You will have to change the selection to reach the supervisor's review section.

1. Are you a supervisor reviewing the responses of an employee? *

   ○ Yes, I am a supervisor conducting a review of a completed PDQ.

   ○ No, I am an employee filling out a PDQ.

PDQ Review Process

1. Employee completes PDQ
2. Supervisor Reviews PDQ
3. Supervisor may send comments for employee to edit
4. Employee makes edits to PDQ
5. Supervisor Reviews and Approves
6. Both Employee and Supervisor receive a final copy of the PDQ
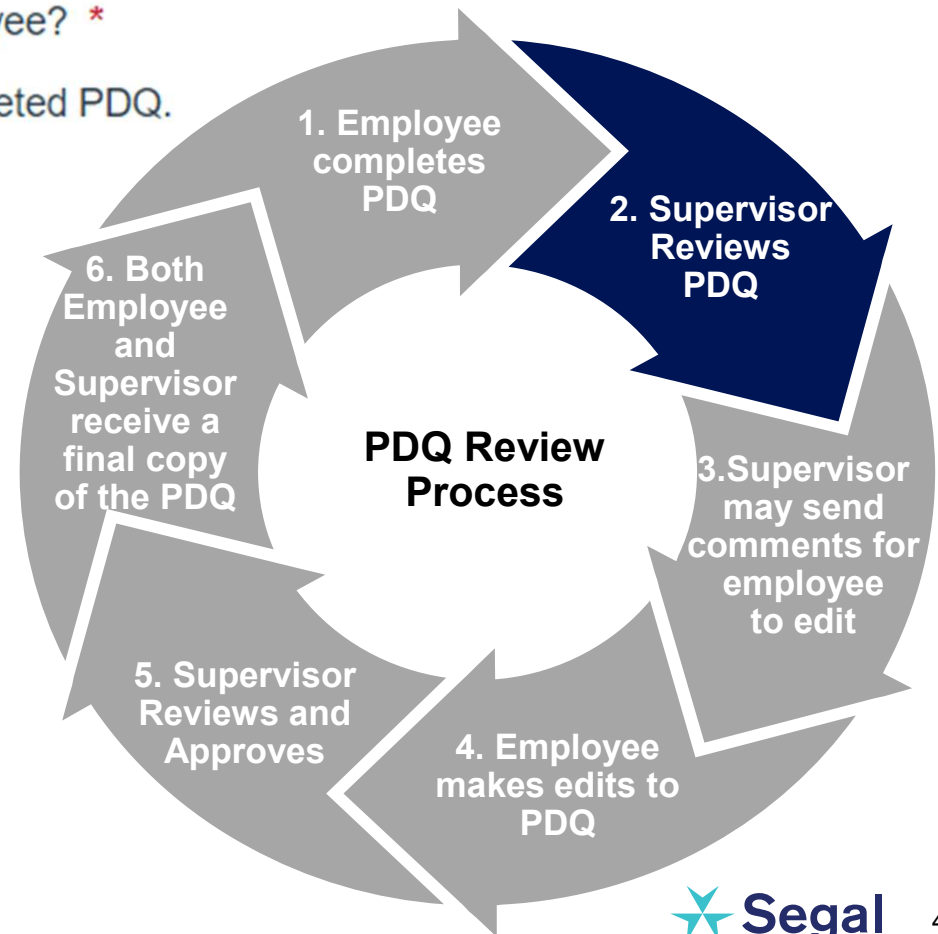
Supervisor Review Process
Beginning review continued…

- Please provide any necessary comments with specific instructions to revise section(s), where necessary, following your review of the PDQs for those who you supervise.

- Confirm if the PDQ is approved (no revisions needed) or should be sent back to the employee(s) for revisions following supervisor (your) comments

- Provide acknowledgement of review

Supervisor Comments *

For Supervisor Only: *

○ I have reviewed and approved the content of this position description questionnaire.

○ I have reviewed the content of this position description questionnaire but request that the PDQ be sent back to the employee for updates following my comments.

If any changes need to be made to an employee's responses, please reach out to the employee to discuss.

FOR REVIEWERS ONLY
Reviewed by *

Date (mm/dd/yyyy) *

Supervisor Review Process
Beginning review continued…

- If a supervisor suggests revisions to the PDQ, the staff member will receive the following email with a PDF including the comments and feedback provided.

- Staff members should utilize the link provided in the email to revise the PDQ based on the supervisor's feedback if they agree with the comments.

- If necessary, staff members should consult with their supervisor regarding their comments and feedback.

Hello,

A Position Description Questionnaire (PDQ) has been completed by an employee you supervise:

Attached is a PDF copy of the response filled. Please use the link below to provide comments, review, and approve the employee's response.
http://survey.alchemer.com/s3/6939548/Clark-University-Position-Description-Questionnaire/?snc=1659354974_62e7bf5e221472.18387512&sg_navigate=start&s=true

Thank you.

Supervisor Review Process
Employee Revisions

- **When revising the PDQ, please select the appropriate box, "No, I am an employee filling out a PDQ."**

- After proceeding past this page, please revise the PDQ where necessary, based on your supervisor's comments and feedback.

1. Are you a supervisor reviewing the responses of an employee? *

   ○ Yes, I am a supervisor conducting a review of a completed PDQ.

   ⊙ No, I am an employee filling out a PDQ.

Enter your Employee ID:

[   ]

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Supervisor Review Process
Supervisor Approval

- Once an employee revises and submits their PDQ, it will be sent back to the supervisor for final review of the revisions and, ultimately, their approval.

- The listed supervisor on the PDQ will receive an automated email from SurveyGizmo <noreply@alchemer.com> asking to review the employee's updated submission.

- To begin the review, please select "Yes, I am a supervisor conducting a review of a completed PDQ" when reviewing PDQs completed by those who you supervise.

Please note that the survey will be sent to you with the answer filled in "No, I am an employee filling out a PDQ." You will have to change the selection to reach the supervisor's review section.

1. Are you a supervisor reviewing the responses of an employee? *

    ⊙ Yes, I am a supervisor conducting a review of a completed PDQ.

    ○ No, I am an employee filling out a PDQ.

Supervisor Review Process
Supervisor Approval

- Once you have reviewed the employee(s) submission and approve, please select the "I have reviewed and approve the content of this position description."

- A finalized PDF copy of the PDQ will be provided to the employee(s) once it has been approved by their supervisor.

Please note that if you have requested revisions from the employee in a prior review of the PDQ, the survey will be sent to you with the answer filled in "I have reviewed the content of this position description but request that the PDQ be sent back to the employee(s) for updates following my comments." You will have to change the selection to approve the revised PDQ.

Supervisor Comments *

For Supervisor Only: *

- ○ I have reviewed and approved the content of this position description questionnaire.
- ○ I have reviewed the content of this position description questionnaire but request that the PDQ be sent back to the employee for updates following my comments.

If any changes need to be made to an employee's responses, please reach out to the employee to discuss.

FOR REVIEWERS ONLY
Reviewed by *

Date (mm/dd/yyyy) *

PDQ Checklist

Employees should have the following to assist them in drafting the PDQ:

- ❑ A copy of the PDQ training materials (PDF)
- ❑ Essential functions worksheet (Word)
- ❑ Glossary of action verbs (PDF)
- ❑ Link to the recorded PDQ training webinar
- ❑ Current position description or job description (if available)
- ❑ Assistance from HR and Segal, if needed, using the email address: positiondescriptions@clarku.edu

Thank You!

Please begin completing your PDQ document

All employees should complete their PDQ by **October 7, 2022**

Supervisors should complete their review by **October 28, 2022**

Additional Questions?

Positions Descriptions

positiondescriptions@clarku.edu

Appendix

Appendix
Glossary of Action Verbs

- **Adjust**—Bring to more satisfactory state; change to enhance a situation.

- **Administer**—Exercise and implement control over the performance of specific operations, approved plans, or established policies within the scope of limited and well-defined authority.

- **Advise**—Give information or opinion pertinent to a probable course of action.

- **Analyze**—Study the factors of a problem to determine a proper solution.

- **Arrange**—Put into suitable order or sequence; to make preparations or plan.

- **Assist**—Take an active part or give support in performing a function.

- **Balance**—Arrange so that one set of elements exactly equals another.

- **Calculate**—Work out by mathematical computation.

- **Check**—Compare with a source, original, or authority.

- **Compile**—Put together a series or group of facts or figures from somewhat related sources into a related whole; usually used in the sense of making a report.

- **Compose**—Form by putting together; formulate or write.

- **Conduct**—Exercise leadership in a project or study.

- **Coordinate**—Combine (through balancing, tuning, or integrating) the efforts of separate groups to accomplish a specific objective; coordination can be exercised without line authority.

- **Counsel**—Give advice and guidance to another.

- **Demonstrate**—To show clearly; illustrate or explain with many examples.

- **Develop**—Advance programs, planning or personnel capabilities to higher state.

- **Direct**—Authoritatively define, regulate, or determine the activities of subordinate organizational units to achieve predetermined objectives.

Appendix
Glossary of Action Verbs

- **Distribute**—Give out; divide among several.

- **Execute**—Put into effect according to a plan (See "Administer").

- **File**—Arrange in order for preservation or reference; place among official records.

- **Gather**—Come or bring together into a group mass or unit.

- **Initiate**—Start, begin, or introduce a program or action.

- **Install**—Set up for use or service.

- **List**—Place in a specified category; register.

- **Maintain**—Keep in an existing state; to continue or preserve; keep in a state of efficiency or validity.

- **Manage**—Plan, organize, and control to achieve coordinated objectives by leading and directing subordinates without giving detailed supervision.

- **Monitor**—Watch, observe, or check for a special purpose; keep track.

- **Negotiate**—Reach agreement on specific proposals through discussion with others of a different viewpoint.

- **Obtain**—Gain or attain by planned action or effort.

- **Operate**—Perform a function.

- **Organize**—Set up plans and procedures for achieving objectives.

- **Participate**—Take part in and share responsibility with others for action but without individual authority to take action.

- **Perform**—Carry out, accomplish; to do in a formal manner or according to a prescribed method.

- **Plan**—Devise or determine a course of action to achieve a desired result.

- **Provide**—Furnish necessary information or services.

- **Post**—Transfer an entry or item from one record to another.

Appendix
Glossary of Action Verbs

- **Prepare**—Make ready for further action or purpose.

- **Process**—Perform a series of actions or operations leading to an end.

- **Prove**—Determine extent of agreement or disagreement with intended relation between results.

- **Recommend**—Offer for acceptance and support a course of action to persons responsible for approval or authorization.

- **Record**—Register, make a record of.

- **Repair**—Restore by replacing a part or putting together what is torn or broken; to fix.

- **Report**—Give an account of; make a written record or summary.

- **Research**—Careful or diligent search; investigate or experiment with the aim of discovery and interpretation of facts.

- **Review**—Critically examine (completed work, reports, performance) with a view to amendment or improvement.

- **Schedule**—Plan a timetable; to set, appoint, or designate for a fixed time.

- **Sort**—Put in a certain place or rank according to kind, class or nature.

- **Supervise**—Oversee or watch with authority work, proceedings, or progress; control employment status, including hiring, salary adjustment, promotion, termination; implies day-to-day concern with details of operation.

- **Tabulate**—Arrange figures or items in rows and columns; computing by means of a table.

- **Transcribe**—Make a written copy; dictated or recorded information in longhand or on a typewriter; transfer from one recording form to another.

- **Verify**—Determine the accuracy of one thing or figure in relation to other things or figures known to be accurate.

Appendix
Developing Essential Functions Statements

- Use the Essential Functions Worksheet to organize your thoughts
- List all activities, duties and tasks the job performs in the "Duties and Tasks" column
- Cluster related activities together under the "Related Groupings" column
  - Eliminate duplicates
  - Clarify language
  - Delete extraneous statements
- Review each grouping to develop an Essential Function Statement

The sample worksheet on the following slides shows activities for a job called "Administrative Assistant," but the process can be used for any job.

Appendix
Using the Essential Functions Worksheet

Job Title: Administrative Assistant

Duties & Tasks
• Prepare and plan for meetings
• Secure space for meetings and conferences
• Plan and coordinate program orientation
• Inform meeting participants of meeting location and time
• Distribute agendas
• Track and monitor program budget
• Draft and type correspondence
• Run reports
• Assist in conducting program assessment
• Serve as on-site liaison for program events
• Coordinate program implementation, including outreach, selection, and enrollment
• Maintain program records and key materials

Sample Description

As you read this list, it is hard to determine overall responsibility of this job

Appendix
Using the Essential Functions Worksheet continued

Job Title: Administrative Assistant

Duties & Tasks	Related Groupings	Essential Functions Statements
• Prepare and plan for meetings and events • Secure space for meetings events • Schedule meetings and events • Plan and coordinate program orientation • Inform meeting participants of meeting location and time • Distribute agendas • Track and monitor program budget • Draft and type correspondence • Run reports • Assist in conducting program assessment • Serve as on-site liaison for program events • Coordinate program implementation, including outreach, selection, and enrollment • Maintain program records and key materials	• Schedule meetings and events • Prepare and plan for meetings and events • Secure space for meetings and events • Inform meeting participants of meeting location and time • Distribute agendas • Serve as on-site liaison for program events	
	• Plan and coordinate program orientation • Coordinate program implementation, including outreach, selection, and enrollment • Assist in conducting program assessment • Run regular program reports	
	• Track and monitor program budget • Draft and type program correspondence • Maintain program records and key materials	

Sample Description

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Appendix
Using the Essential Functions Worksheet continued

Job Title: Administrative Assistant

Duties & Tasks	Related Groupings	Essential Functions Statements
• Prepare and plan for meetings and events • Secure space for meetings events • Schedule meetings and events • Plan and coordinate program orientation • Inform meeting participants of meeting location and time • Distribute agendas • Track and monitor program budget • Draft and type correspondence • Run reports • Assist in conducting program assessment • Serve as on-site liaison for program events • Coordinate program implementation, including outreach, selection, and enrollment • Maintain program records and key materials	• Schedule meetings and events • Prepare and plan for meetings and events • Secure space for meetings and events • Inform meeting participants of meeting location and time • Distribute agendas • Serve as on-site liaison for program events	Coordinate all aspects of meetings and events by: • Scheduling meetings and events and informing participants of location and time • Securing space and working with key stakeholders on logistics • Sending soft-copy agendas to participants before the meeting and distributing hard copies during the meeting • Serving as on-site liaison for program information, questions, and concerns
	• Plan and coordinate program orientation • Coordinate program implementation, including outreach, selection, and enrollment • Assist in conducting program assessment • Run regular program reports	Support specific program activities and initiatives through: • Planning and coordinating orientation • Coordinating implementation, outreach, selection, and enrollment for program • Conducting program assessment • Running regular program reports and diagnostics
	• Track and monitor program budget • Draft and type program correspondence • Maintain program records and key materials	Provide logistical and operational support by: • Tracking and monitoring program budget • Drafting and typing correspondence • Maintaining program records and key materials

Sample Description