

GENERAL INFORMATION

Please print or type:

Employee Name: «Name»

Department Name: «Department Name»

Supervisor's Name: _____

Supervisor's Title: _____



POSITION INFORMATION QUESTIONNAIRE

For Human Resources Use Only:

GENERAL INFORMATION

The purpose of this questionnaire is to collect detailed information for University of Tulsa positions. Answers will be used to ensure that the position description is accurate and up-to-date. Please print or type answers to every question.

When responding to the questions:

Current

- Describe the position as it **currently** exists, not as it was in the past or may be in the future.

Typical

- Describe the position **as it is typically conducted** over an extended period of time (such as a year); do not describe just a particular dimension of the position or a temporary assignment.

Accurate

- **Avoid understating or overstating the position's requirements.** It may be helpful to think about the responses as though explaining the position to a new staff member.

Scope

- Consider **how you think your supervisor and those you supervise would answer.** **Also, it is important to consider how your position is viewed within the University structure.**

This is not a test

- Consider **how the position would normally be performed by the typical staff member.** Feel free to discuss responses with others in the position. This is not a test of performance or competence.

POSITION SUMMARY

Indicate the type of equipment **regularly** used in your position.

Medical/Laboratory equipment (Please specify) _____

Maintenance equipment (Please specify) _____

Office Equipment:

- | | |
|--|--|
| <input type="checkbox"/> Typewriter | <input type="checkbox"/> Paper shredder |
| <input type="checkbox"/> 10-key calculator | <input type="checkbox"/> Fax machine |
| <input type="checkbox"/> Copy machine | <input type="checkbox"/> Transcription equipment |

Telephone:

- Single set
- Multi-line set

On-line capabilities:

- E-mail
- Datatel
- Internet

Other (Please specify): _____

Personal Computer/Software Packages:

- | | |
|--|--|
| <input type="checkbox"/> Personal Computer | |
| <input type="checkbox"/> Macintosh | |
| <input type="checkbox"/> Microsoft Word | <input type="checkbox"/> WordPerfect |
| <input type="checkbox"/> Microsoft Excel | <input type="checkbox"/> Lotus 1-2-3 |
| <input type="checkbox"/> Microsoft Access | <input type="checkbox"/> SPSS |
| <input type="checkbox"/> Power Point | <input type="checkbox"/> Front Page |
| <input type="checkbox"/> Windows | <input type="checkbox"/> Microsoft Publisher |

Other (Please specify) _____

II. PRINCIPAL POSITION DUTIES

MOST IMPORTANT POSITION RESPONSIBILITIES/DUTIES

On page 6, list the ten major duties, starting with the most important, for which your job position is responsible. Use statements that start with action verbs such as *type, compose, maintain, direct, analyze, plan*, etc. Think in terms of what, why and how the duties of your job are performed. For example, a typical responsibility statement for a programmer/analyst might be: *"Develop detailed design specifications for data processing systems."* A secretary may respond: *"Type correspondence for review, edit and signature."*

ESTIMATE PERCENTAGE OF TIME

Estimate the percentage of time spent performing each duty. The following chart will assist you in estimating time percentages on either a daily, weekly, monthly or annual basis.

Percentage	Day	Week	Month	Year
5%	30 minutes	2 hours	1-1/2 days	2 1/2 weeks
10%	1 hour	4 hours	3 days	5 weeks
15%	1 - 1/2 hours	6 hours	4 1/2 days	2 months
20%	2 hours	8-hours	6 days	2-1/2 months
25%	2 - 1/2 hours	10-hours	7 1/2 days	3 months

Time spent for any duty should account for at least **5% of total time**, unless it is a critical part of the position (e.g., negotiating a purchase agreement every three years). If the time spent for any one responsibility **exceeds 25%**, consider splitting the task statement into two or more statements. **The total of all percentages should account for at least 80% to 90% of the position's time and should not exceed 100%**. Please limit your responses to the number of lines provided on page 6.

CRITICAL LEVEL

In the last column, **rate how critical the duty is to the position** using a scale of 1 to 5 (1 being less important, 5 being more important). **Keep in mind that percent of time does not necessarily indicate how critical the duty is to the position.** Things done occasionally may still be critical to the job. Consider those duties which define your job to be the most critical. There may also be more than one duty with the same rating (e.g. 2, tasks ranked 2, etc).

Critical Levels Rated: Least important (1) (2) (3) (4) (5) Most important

II. PRINCIPAL POSITION DUTIES CONTINUED

* Critical Levels Rated: Least important (1) (2) (3) (4) (5) Most important

	Principal Position Responsibilities/Duties	Estimated % of Time	* Critical Level
	Example: <i>Total accounts, check math and update reports, as required</i>	20%	3
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
		100 %	

III. JOB EVALUATION FACTORS

1. FORMAL EDUCATION (Check only one response)

This factor identifies the minimum formal education (diploma, degree, training or combination) required in order for the position to be performed at least **satisfactorily**. **Remember:** This is the education level required for the position, **not your own level of education**.

- 1. **High School Diploma or GED preferred.**

- 2. **High School Diploma or GED required.**

- 3. **Vocational or other technical school, certification, training or apprenticeship required beyond high school.**

- 4. **Associate's Degree or Two Year College equivalent required.** Major(s) required: _____

- 5. **Bachelor's Degree required.** Major(s) required: _____

- 6. **Master's Degree required.** Major(s) required: _____

- 7. Knowledge of a **highly advanced professional discipline** (e.g. M.D., Ph.D., J.D. or equivalent doctoral degree required.)
Discipline/Major(s) required: _____

- 8. **Licenses, Certifications or Registrations required.** List any licenses, certifications or registrations required of the position:

III. JOB EVALUATION FACTORS CONTINUED

2. WORK EXPERIENCE (Check only one response)

This factor evaluates the time normally required for a person with the necessary educational background to develop the required skills and abilities to perform a specific job.

Note: The factors of education and experience should be evaluated independently. However, it is recognized that when recruiting staff, these factors may be used interchangeably (e.g., a candidate may qualify for employment by supplementing a lack of formal education with significant position-related experience).

Please check the **minimum amount of prior related work experience** required of new staff in filling the position.

Work Experience	
<input type="radio"/> 1. Less than 1 year	<input type="radio"/> 5. 5 years to < 7 years
<input type="radio"/> 2. 1 year to < 2 years	<input type="radio"/> 6. 7 years to < 10 years
<input type="radio"/> 3. 2 years to < 3 years	<input type="radio"/> 7. More than 10 years
<input type="radio"/> 4. 3 years to < 5 years	

State the specific minimum previous experience or skills required to perform the duties:

(Example: Three years experience as an RN in a pediatric clinic)

III. JOB EVALUATION FACTORS CONTINUED

3. IMPACT OF ACTIONS (Check only one response)

This factor identifies the impact of your position on the functions of the University. Impact is measured by the importance of the decisions or final recommendations the position typically renders. Consider the impact of the position when everything is running smoothly, **not** when **unique situations** arise **or worst case scenarios** are presented.

Please check the box that most closely describes the impact of your decisions.

- 1. Decisions and impact are **normally limited to my position**.
- 2. Decisions and impact are limited to decisions and planning **within a small work group or project team**.
- 3. Make recommendations or decisions that **usually affect the entire department**.
- 4. Make recommendations or decisions which **usually affect the assigned department**, but **may at times** affect operations, services, individuals or activities of **others outside of the assigned department**.
- 5. Makes decisions and final recommendations **which routinely affect the activities of the University**. Position duties **may include** responsibility for developing strategic plans.
- 6. The work involves leadership which **routinely affects the University and/or the surrounding community** in a demonstrable way.
- 7. The position has **strategic impact affecting the long-range future of the University of Tulsa**.

III. JOB EVALUATION FACTORS CONTINUED

4. COMPLEXITY (Check only one response)

Please check the box which most closely describes the complexity required in your position. Complexity is measured in terms of:

- nature of the tasks performed and the reliance on policies and procedures;
 - extent of problem solving capabilities necessary;
 - level of analytic and organizational ability required.
-
- 1. **Standardized:** Work consists of a **few repetitive duties**. Tasks are restricted in scope, well-defined and clearly-prescribed; standard procedures guide all work. Problems are solved by reporting them to a supervisor.
 - 2. **Routine:** Work consists of **routine tasks, processes, or operations**. The incumbent selects and applies several clearly-prescribed, standard policies and procedures requiring little interpretation. Problems are solved by choosing between a few clear choices or discussing them with a supervisor.
 - 3. **Basic:** Work consists of **moderately complex procedures and tasks** where basic analytic ability is required. Work may involve the comparison of numbers, selection of appropriate guidelines and procedures, or identification of appropriate actions to follow. Answers are usually found by selecting from specific choices defined in work policies or procedures.
 - 4. **Varied:** Work is **complex and varied** and requires the selection and application of technical and detailed guidelines. Problems are not easy to identify, but are similar to those seen before. Moderate analytic ability is needed to gather and interpret data where results/answers can be found after analysis of several facts. Solutions can often be found by using methods chosen in other situations.
 - 5. **Analytic:** Work is **non-standardized and widely varied** requiring the interpretation and application of a substantial variety of procedures, policies, and/or precedents used in combination. Frequently, the application of multiple, technical activities is employed; therefore, analytical ability and inductive thinking are required. Problem solving involves identification and analysis of diverse issues.
 - 6. **Highly Complex:** Work is **broad in scope covering one or more complicated areas**. Policy, procedure, or precedent are typically created by this position. A high degree of analytic ability and inductive thinking is required to devise new, non-standard approaches to highly intricate, technically complex problems.
 - 7. **Multifaceted:** Work is **broad in scope covering virtually the entire University's operations**. Policy, procedures and precedent are created and/or approved by this position. Problem solving requires understanding and evaluation of the impact on the University.

III. JOB EVALUATION FACTORS CONTINUED

5. DECISION MAKING (Check only one response)

Please check the box which most closely describes the decision-making level of your position. Decision-making is measured in terms of:

- the opportunity for independent actions;
- the level of direction and supervision received.

1. **Standardized:** Little, if any, independent judgement or decision-making is required. The incumbent follows standard procedures in a predefined order for each assignment.
2. **Routine:** Work may occasionally involve non-standard assignments; however, the methodology is normally prescribed in detail by the immediate supervisor. There is **limited opportunity for independent judgement.**
3. **Basic:** Ongoing supervision is provided on a regular basis. Desired results are clearly defined, however, some **independent judgement is necessary** to select and apply the most appropriate of available procedures.
4. **Varied:** Supervisor is available on an "as needed" basis to establish general objectives and to identify potential resources for assistance. **Independent judgement is required** to select and apply the most appropriate of available guidelines and procedures to achieve desired results.
5. **Analytic:** Supervisor is available to establish broad objectives relative to basic position duties or departmental responsibilities. **Independent judgement is required to study previously established,** often partially relevant guidelines; plan for various interrelated activities; and coordinate such activities within a work unit or while completing a project.
6. **Highly Complex:** Supervisor is available to review established departmental and/or University objectives. Independent judgement is required to recommend departmental or University objectives, evaluate new approaches to problem solving, and assess changing facts or conditions.
7. **Multifaceted:** Supervisor is available on a limited time basis to review broad objectives. **Independent judgement is required to review and approve** major recommendations, establish procedures, and coordinate technical and administrative recommendations with University-wide policies. Decisions may have a long-term impact on the University.
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III. JOB EVALUATION FACTORS CONTINUED

6. COMMUNICATION (Check only one response)

This factor identifies the responsibility for working with or through other persons to obtain results. The contacts or relationships may be inside or outside the University. In measuring this factor, consider: *why the contact is necessary, the importance and frequency of the contact(s), the amount of tact and persuasion typically required and whether your position must handle confidential information.* Contacts which are not work-related should not be considered.

Check the box below which best describes the extent of internal and outside contact associated with your position. **Outside contacts include students, the general public or other organizations.**

- 1. **Little or no contact** required externally or internally except with immediate associates and the supervisor.
- 2. Requires **regular contact within the department** and **occasional contacts with other departments, outside agencies or the general public**, supplying or seeking information.
- 3. Requires **regular contact within the department** and **with other departments, outside agencies or the general public**, supplying or gathering information.
- 4. Requires **regular internal and external contact** to discuss issues of moderate importance and to respond to inquiries. **Occasionally requires** contact with officials at higher levels on matters requiring cooperation, explanation and persuasion and/or **with the public** involving the enforcement of regulations, policies and procedures.
- 5. Requires **continuing internal and external contact** to discuss issues of moderate importance and to respond to inquiries. **Occasionally requires** contact with officials at higher levels on matters requiring cooperation, explanation and persuasion and/or **with the public** involving the enforcement of regulations, policies and procedures.
- 6. Requires **regular contact with internal and external persons of importance and influence.** Requires considerable tact, discretion and persuasion in obtaining the cooperation of others. Requires the handling of delicate relationships and complex situations.
- 7. Requires **developing and maintaining ongoing internal and external relationships involving difficult, formal negotiations.** This calls for a well-developed sense of timing, strategy and may involve detailed explanation and interpretation of policies, rules and regulations. Requires the handling of extremely delicate/sensitive relationships and complex situations.

III. JOB EVALUATION FACTORS CONTINUED

7. SUPERVISORY SKILLS (Check only one response)

This factor identifies the responsibility for directing others. Only the **formal** assignment of responsibility for directing others should be considered (do not include temporary assignments). Informal working relationships or temporary assignments should not be considered for the questions that follow. Supervisory tasks include: hiring and terminating, structuring and assigning work, performance appraisals and disciplinary actions.

Please check the statement which most closely represents the position.

- 1. Involves **no responsibility or authority** for the direction of others.
- 2. Has the responsibility or **authority which is limited** to the direction of temporary or student workers.
- 3. **Responsible for orientating and training others**, and assigning and reviewing their work. May also be responsible for acting in the "**lead**" or "**senior**" **capacity** over other positions performing essentially the same work, or related technical tasks and reporting to a higher level on a formal basis.
- 4. Responsible for **providing limited supervision for one or more functions within a department**. Formally plans, assigns, directs, and coordinates the work of these functions. Typically responsible for performing some non-supervisory duties in addition to supervisory responsibilities. May perform staff evaluations and make recommendations regarding pay and/or performance.
- 5. **Responsible for making recommendations within a department** in the areas of compensation, staff selection, disciplinary action, complaints, staff performance appraisal, and similar supervisory duties. **Plan, assign, and evaluate the work of subordinates** for effective operation and results.
- 6. **Responsible for supervising multiple functions** with full accountability for effective operation and results.
- 7. Has **overall responsibility for providing direction and guidance** for major segments of the University of Tulsa.

Please indicate the number of employees regularly reporting to your position (including part-time employees). If no one reports to this position, please indicate zero.

• Number of employees directly supervised: _____ • Number of indirectly supervised employees (including work study students) _____

IV. WORKING CONDITIONS

In this section of the questionnaire, provide information about your working conditions. *Note: It is important in this section that your response is based on what is **necessary in the position under typical conditions**.* These questions are included because physical effort is an important element in some jobs.

Check the appropriate box that describes the characteristics of the mental/physical environment in which your work assignments are performed.

- 1. **Minimal exposure** (0 – 5%) to physical* and/or mental** stress or discomfort. Standard office environment with clean work area and pleasant surroundings.
- 2. **Occasional exposure** (6% - 15%) to physical and/or mental stress or discomfort.
- 3. **Frequent exposure** (16% - 50%) to physical and/or mental stress or discomfort.
- 4. **Regular exposure** (51% - 90%) to physical and/or mental stress or discomfort.
- 5. **Constant exposure** (91% - 100%) to physical and/or mental stress or discomfort.

*Physical stress or discomfort includes but is not limited to onerous odors; handling greasy, inky or dirty materials; extreme temperature changes; irritating noises; heavy lifting; stooping, standing, bending, climbing or sitting with no relief; and safety hazards. These are job related and unavoidable.

**Mental stress or discomfort includes but is not limited to contact with others made disagreeable by volume or nature of contacts; deadlines; interruptions; confinement to work station; pressures to meet productivity standards; and pressures caused by extreme precision and/or accuracy requirements. These are job related and unavoidable.

V. ADDITIONAL POSITION CHARACTERISTICS

Normal scheduled hours worked per week _____ (hours)

State the specific working hours of this position **if other than 8:00 a.m. to 5:00 p.m., Monday – Friday** (e.g., weekends, evenings, rotating shift, on-call, etc.):

Does this position require overtime? No Yes (if yes, explain) _____

Does this position require travel? No Yes (if yes, complete applicable options)

Local Midwest Continental US Foreign

Define frequency of travel: _____

Does this position require overnight stay? No Yes

Does this position require the use of a university vehicle in order to accomplish the duties of the position? No Yes

Does this position require the use of your personal vehicle in order to accomplish the duties of the position? No Yes

VI. COMMENTS

EMPLOYEE COMMENTS:

Describe any aspect(s) of the position you feel require additional explanation.

Employee's Name (please print and sign): _____

SUPERVISOR'S COMMENTS:

Supervisor's Name (please print and sign): _____

Department Head's Name (please print and sign): _____

COPY THIS FORM FOR YOUR DEPARTMENT AND PERSONAL RECORDS.