

# University of North Carolina at Chapel Hill

## Instructions for Completion of the Career Banding Position Description Form (PD-102-CB)

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 attached Career Banding Position Description Form is used at the University of North Carolina at Chapel Hill to obtain complete and factual information concerning the work assigned to career banded positions. The form and these instructions have been designed with a format to:

- (1) enable and aid managers and supervisors in describing their subordinate positions
- (2) provide relevant and adequate information for the position establishment and reallocation process
- (3) provide management with a tool that 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 Section 1 and 2 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 3 through 9. It is essential that this information be complete and accurate. Use the space provided on the form and additional paper as required. The form may be typed, or completed on a word processor by using the same number and heading format as that shown on the form.

**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 organization 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 or action sequence to accomplish an objective.

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### **Writing the Description: Sections 3 through 9**

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

3. **Primary Purpose of Organizational Unit:** Describe the purpose of the organizational unit. (Why it exists and its mission.)
4. **Primary Purpose of This Position:** Describe the purpose of the position. (Why it exists and how it relates to the department's mission).
5. **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.
6. **Description of Work:** This section 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:

- 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
- Sequential order: describe the position in terms of the sequence 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 on each responsibility as shown in the left margin.

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

- Planning: Setting programmatic or operational goals.
- Organizing and directing work: Involvement in directing day-to-day operations.
- Financial management: Determining budgetary requirements and managing operational budgets.
- Review: Review of work for conformance with instructions and objectives of the organization.
- Personnel: Describe the extent of involvement in:
  - Orientation, initial and ongoing 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

7. **Competencies:** "Knowledge, skills, and abilities required for this position." The competencies required should have a direct relationship to the job duties of the position..

8. **Education and Experience Required:** What educational background is needed to perform these duties and responsibilities? What kind of work experience is needed?

9. **License or Certification Required By Statute or Regulation:** Type of license required by position.

10. **Other Position Characteristics or Essential Posting Requirements:** Following is a list of instructions concerning other important position characteristics which are either (1) involved in the work process, (2) prescribe requirements or controls concerning the performance of work, or (3) relate to conditions of work. Explain each separately in the spaces provided in Section 9 on the form.

- Accuracy Required in Work: Describe the nature and degree of accuracy required in the work.
- 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.
- 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.
- 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.

- **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.
- **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.
- **Physical Effort:** Describe the type of physical effort which is required in doing the work, its frequency of occurrence and duration.
- **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 acts from others. State what safeguards are in place or available to relieve or minimize hazards.
- **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.
- **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.
- **Safety for Others:** Identify any hazards or work procedures which could be potentially harmful to others and what precautions and rules must be followed to prevent such occurrences.
- **Dynamics of Work:** Describe and explain the nature, extent, frequency and type of changes which impact upon the work, and the cause or source 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 changes, etc., should be included.)

**11. Spans and Layers Certification:** The following section is in accordance to the University's guidance on Spans and Layers. (*Insert link to website*) Indicate whether the position is supervisory by checking yes or no. If yes, then enter the number of permanent employees supervised. If this number is less than four permanent employees then the direct signature of the relevant Dean or Vice Chancellor is required. **NOTE:** Designee signatures will not be accepted unless previously approved by OHR.

**12. Certification:** Upon completion of the entire description, two higher level signatures are required. The Supervisor must sign (except in the case of a vacancy) and one higher level signature of either the Department Head and/or the appropriate Dean or Vice Chancellor depending on internal protocol. In the event of a requested exception, to the Spans and Layers Verification Section 11, the appropriate Dean or Vice Chancellor's signature is required. There are no designee's for this verification except where OHR has specifically given advance approval. 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. In the event the incumbent is leaving and the duty changes do not take place until after a new incumbent is in place it is not necessary to obtain the employee's signature that is vacating the position. Two copies of the form should be prepared. The original should be forwarded to your Class and Comp Consultant (Office of Human Resources; *CB 1045*), and the second copy retained in your departmental files or as otherwise instructed.