Oberlin College and Conservatory

Position Description Questionnaire Training Session

Training Overview

April 2022
Agenda

Project Introduction
Important Considerations
Overview of the Position Description Questionnaire
Position Description Questionnaire Process Review
Project Introduction
## Project Introduction

### Project Study Phases and Estimated Timing

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Spring 2022</td>
<td>Spring – Summer 2022</td>
<td>Summer 2022</td>
<td>Fall 2022 – Early 2023</td>
<td>January – February 2023</td>
<td>Spring 2023</td>
</tr>
</tbody>
</table>
Project Introduction

Difference Between a PDQ and Job Description

- 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
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

Segal/HR will use the information gathered from the PDQs to develop accurate job descriptions, a job leveling framework, and titling guidelines.
Project Introduction
The Importance of Accurate Job Descriptions

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

- **Salary Grade or Band Assignment**
  - Ensure jobs are assigned to the appropriate salary structure grades/bands

- **Compliance**
  - Americas with Disabilities Act (ADA)
  - Equal Employment Opportunity and Affirmative Action (EEO/AA)
  - Fair Labor Standards Act (FLSA)

- **Internal Equity**
  - Ensure employees with similar responsibilities, performance, knowledge, skills, and experience are paid fairly and equitably

- **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
### Detailed PDQ Completion Process and Timeline

<table>
<thead>
<tr>
<th>Stage</th>
<th>Timeframe</th>
<th>Activities</th>
</tr>
</thead>
</table>
| 1. Preparation of PDQ Online Tool and Training Materials            | Late February – Early March      | • Questions and content development  
• Workflow and approval process                                      |
| 2. Pilot Testing                                                    | Early March – Late March         | • Kick-off meeting with Project Team  
• Oberlin HR & Finance Project Team and select stakeholder testing of tool  
• Refinements to online tool incorporating feedback                   |
| 3. Training Sessions                                                | Late April                       | • Training session for employees and managers (will be recorded)             |
| 4. Employees Complete PDQ                                           | April – May                      | • Employees review and complete PDQ (estimate 30 min – 1 hr of time)         |
| 5. Supervisors Review, Edit, and Approve PDQ                       | Mid May–Late May                 | • Supervisors review, edit, and approve submitted PDQs by employee  
• Supervisors hold conversations with employees to discuss changes and resolve any differences in information entered |

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

Roles in Completing and Reviewing PDQ

- **Staff** will be responsible for:
  - Building their Position Description Questionnaire
  - Providing insights on daily responsibilities and position content

- **Supervisors** are responsible for:
  - Confirming current position and responsibilities with employees
  - Reviewing and responding to the completed PDQs, ensuring all position content is accurate and submitted on time

- **Human Resources/Segal** will be responsible for:
  - Ensuring that PDQs have been reviewed and discrepancies have been addressed
  - Aligning positions into job groupings and job titles, identifying job families, and assigning jobs to job families
  - Developing representative job descriptions

Employee A fills out their PDQ
Employee B fills out their PDQ
Supervisor reviews and approves each employee’s PDQ

HR/Segal review all PDQ’s, conduct an analysis of jobs and job levels; create job descriptions
Important Considerations
Important Considerations

General Overview

When completing the Position Description Questionnaire, make sure to:

• Describe what is required to perform your role (you might have some unique skills to offer that may not necessarily be required for your position)
  – Example: Tom is a bilingual financial analyst; however, his position does not require him to be bilingual. Please do not add bilingual as a requirement in the position description

• Describe your current position content in a normal operating environment, not based on anticipated changes or prior functions no longer in use

• Do not include temporary assignments/responsibilities that will not be a permanent part of the position’s responsibilities going forward (there is a place to put skills, etc. applicable during Covid in the questionnaire)
  – Example: Sally is the Assistant Director for Accounting, acting as interim Accounting Director. Please do not include responsibilities related to the interim role in the position description

• Avoid jargon, spell out acronyms, and define technical terms (when necessary)
  – Example: Bob is an accountant, and his position requires a CPA certification. Please write out Certified Public Accountant.

• Use position titles or roles when referring to others at Oberlin. Use names of people only when specifically required
  – Example: Instead of “works with Cindy to ensure all local laws and regulations are met,” state “works with Compliance Manager to ensure all local laws and regulations are met”
### Important Considerations
**What to Include and Not Include?**

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

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”
Overview of the Position Description Questionnaire
Overview of the Position Description Questionnaire

Key Instructions

- Read the questionnaire to get a sense of what is being asked of you
- If you have a previous position description, it might be helpful to review and/or have on hand
- When filling in the questionnaire, make sure that your responses reflect your current role, not anticipated changes or prior responsibilities
- Your information will be saved as you move from page to page by clicking the Next and Previous buttons. You may also save your information by clicking the Save button
- **NOTE:** If you leave the page without using a navigational button, the data on that page will not be saved. Be sure to click the Save or Next button before you leave the page and/or your computer
- You do not need to complete the questionnaire in one session. You may return and continue completing the questionnaire as many times as needed until you click the Submit Questionnaire button, so long as you remember to save
- Once you have completed the questionnaire, print a copy of the PDQ and save it then click the Submit button. Once you click the Submit button, you may not make any further changes. Please complete and submit your questionnaire no later than **May 13th**.
- If you need help or have questions about the questionnaire, contact Human Resources via email at OCTotalCompStudy@oberlin.edu or contact JobBlox support at support@econsultingnetwork.com.
Overview of the Position Description Questionnaire

Getting Started

1. Go to the browser on your computer type: http://oberlin.jobblox.com

2. The system will open the login screen:

3. Click the hyperlink that says Recover Password?

4. The system will ask you for your email (You might need to try both of your email addresses) then select Ask Me the Security Questions

5. The Answer: Oberlin College and Conservatory

6. The system will send you an email. Follow the instructions in the email

7. We can help you if you forget your password, but we won’t know your password. You can always recover a new password by following the instructions above

8. Note: 3 unsuccessful login attempts will lock your account; if so, email: support@econsultingnetwork.com

9. The JobBlox support team will unlock your account and send you a new password via email

10. The password does not expire, it is okay to the same password for the entire process
Welcome!

The data on the 1st screen identifies the incumbent and the position.

Navigational Buttons:
The navigational buttons at the top and the bottom of the screen allow you to move through the document.
Overview of the Position Description Questionnaire

Position Description Sections

1. The table of contents allows the user to navigate to a particular section of the questionnaire.
2. If you leave the questionnaire before you are finished, you can select the last page you were on and start from there when you return.
3. Select Content to come back to the table of Contents from any screen.
Overview of the Position Description Questionnaire

Position Summary

This is a brief **Position Summary** of the role’s responsibilities at the College — an “elevator speech” or LinkedIn summary

- You meet an old friend in an elevator or are updating LinkedIn. How would you describe your role very briefly or in summary fashion?

- Sometimes the summary is easier to draft after you have finished the rest of the Position Description Questionnaire

- If you need help, you can refer to your current position description (if available and applicable)
Sample of brief summaries…

- The Accountant will prepare financial reports to track the organization’s assets, liabilities, profit and loss, tax liabilities, and other related financial activities.

- The Accounting Manager will plan and direct the accounting activities of the department.

- The Athletics Coach 1 provides entry-level assistance in coaching one of a variety of ABC College sports programs operating under NCAA Operating Bylaws. Assists with various aspects of the program, which may include activities such as individual recruitment or training and/or strength conditioning for athletic competition. Receives instruction and developmental guidance from more senior coaching staff.

- The Web Developer II designs, builds, and maintains our websites. Works to ensure online tools and websites for internal users and external visitors are effective and meet the College’s online standards. In addition, the Web Developer II manages the technical functionality of the College’s online tools and websites.
Major Duties (or Essential Functions) are those major ongoing 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

- Describe **up to** eight primary 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 >10% of time
  - **Note:** The percent of time spent on a task may not necessarily reflect how critical the task is to the position
- Ideally, these tasks would total 80%–90% of time and should not exceed 100%
Overview of the Position Description Questionnaire
Position Summary and Essential Functions

Describing Essential Functions Clearly

Use the following pattern to write an essential function statement:

- **Action Word** + **Subject** + **Activities**

*For example:*

**Action Word**

Review and validate transactions by ensuring completeness and accuracy of the account balances.

**Subject**

Activities

*For a sample list of action words, please see the Appendix of this document.*
**Overview of the Position Description Questionnaire**

**Position Summary and Essential Functions**

Other Examples of Essential Function statements:

<table>
<thead>
<tr>
<th>Maintain audio-visual equipment inventory by:</th>
<th>Provide technical IT support to the College by:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Tracking borrowed equipment</td>
<td>• Responding to telephone calls, email, and personnel requests for technical help</td>
</tr>
<tr>
<td>• Entering new equipment into the equipment log</td>
<td>• Troubleshooting user computer problems by documenting, tracking, and monitoring the problem to ensure a timely resolution</td>
</tr>
<tr>
<td>• Ensuring the accuracy of the equipment database</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Prepare monthly financial reports by:</th>
<th>Identify funding opportunities for the College by:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Collecting and verifying financial data</td>
<td>• Cultivating relationships with potential donors</td>
</tr>
<tr>
<td>• Entering current data into spreadsheets</td>
<td>• Coordinating outreach, fundraising, and other special events</td>
</tr>
<tr>
<td>• Running analysis reports</td>
<td></td>
</tr>
<tr>
<td>• Consolidating final figures into standard monthly financial reports</td>
<td></td>
</tr>
</tbody>
</table>

Additional process steps to develop essential functions are provided in the *Appendix* of this document.
Indicate whether the position has **supervisory responsibilities** over other positions.

1. Select the appropriate choice:
   Yes/No

2. If yes, then fill in the section on the employee type and full-time/part-time status on the right

3. Indicate if your direct reports have direct reports too

4. As always, if needed, provide additional comments to better describe your level of supervisory responsibilities

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![Position Description Questionnaire](image)

**Supervisory Responsibilities**

Do you have formal supervisory responsibilities for any other College employees or student workers? You have formal supervisory responsibilities if you have hiring/firing responsibilities, conduct performance evaluations, etc. Check Yes or No.

- If Yes, indicate how many employees you currently supervise directly (including vacancies) in the table below.
- If No, go to the next page.

<table>
<thead>
<tr>
<th>Employee Type</th>
<th># of Employees (Current)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Full-Time</td>
</tr>
<tr>
<td></td>
<td>Part-Time</td>
</tr>
<tr>
<td>Faculty/Instructors</td>
<td></td>
</tr>
<tr>
<td>Exempt Staff (Salaried)</td>
<td></td>
</tr>
<tr>
<td>Non-Exempt Staff (Hourly)</td>
<td></td>
</tr>
<tr>
<td>Student Workers</td>
<td></td>
</tr>
<tr>
<td><strong>Total Employees</strong></td>
<td></td>
</tr>
</tbody>
</table>

Do any of your direct or indirect reports currently supervise other employees (including vacancies)? Check Yes or No.

Use this space for additional comments or notes, if you have any.
Overview of the Position Description Questionnaire

Financial Responsibilities

Indicate whether the position has **financial responsibilities** as part of the job.

1. You may select any or all that apply

2. As always, if needed, provide additional comments to better describe your level of financial responsibilities
Overview of the Position Description Questionnaire

**Education Requirements**

- Select the **education level** that best describes the **required** and/or **preferred** level of education to perform the position

  - **Note:** The **minimum** required, and preferred levels of education may or may not be the same as your level of education, either currently or when you started

- Make a note indicating the specific major or discipline, i.e., “mathematics or related fields”

- Make a note indicating if you think that the education requirement could be satisfied with a specific level of experience
Overview of the Position Description Questionnaire

Experience Requirements

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

- The minimum required and preferred levels of position-related experience may or may not be the same as your level of position-related experience, either currently or when you started

Make a note about the kind of experience you need to do the job, i.e., progressive supervisory experience

Make a note if you could replace the required experience with some level of education

<table>
<thead>
<tr>
<th>Related Work Experience</th>
<th>Required?</th>
<th>Preferred?</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 1 year of related work experience</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>1 ≤ 3 years of related work experience</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>3 ≤ 5 years of related work experience</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>5 ≤ 7 years of related work experience</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>7 ≤ 9 years of related work experience</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>9 or more years of related work experience</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

Specify the type of experience, if applicable

Can education be substituted for years or related work experience requirements? If so, please describe.

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Overview of the Position Description Questionnaire

Certifications/Licenses

- Indicate credentials required to do your position
- Indicate other credentials that would make it easier for you to perform in your role – preferred but not required
  - Note: if you have credentials that are not required or preferred, there is no need to enter them

![Position Description Questionnaire](image)
Overview of the Position Description Questionnaire

Required Knowledge, Skills, and Abilities

- Review the section carefully
- Fill in any required knowledge, skills, and abilities
  - **Knowledge** is the understanding of a set of responsibilities specific to a position that can be gained via formal education and/or position-related training or experience
  - **Skills** are the practical expertise or talent needed to perform the responsibilities of the position or complete a task and achieve specific outcomes
  - **Abilities** refer to the power or capacity to perform an activity or task successfully
Overview of the Position Description Questionnaire

Additional Information

- Please include all relevant information. This section also serves as a “final thoughts” box to add anything else about the position that wasn’t already captured in the template and that may be useful for the reader to know.

- There is a section for you to comment about your title; it is helpful for us to understand what title you think best fits your job.

- If you choose to send a note to your supervisor in the box marked “Notes or comments…” the note will go on the system generated email to your supervisor. The note is not saved by the system.

- If you want the note to go on the “record”, type it into the text box above.

- Print a copy of your PDQ to save as a record of your submission.
Overview of the Position Description Questionnaire

- The printed copy can be saved to your hard drive
- PDF version
Overview of the Position Description Questionnaire Approvals

- Review it one more time
- Click Submit
  - The system will give you the option to add comments and send them to your Supervisor
- Click OK
  - Your PDQ will be saved and your Supervisor will get an email telling them your PDQ is ready for their review
Position Description Questionnaire Process Review
## Position Description Protocols

### Employees and Supervisors

**Employees**
- ✓ Adds position content
- ✓ Prints an electronic copy of the PDQ
- ✓ Submits the PDQ to the Supervisor

**Supervisor**
- ✓ Reviews the submitted PDQ
- ✓ If necessary, asks the employee to make updates
- ✓ Adds Supervisor comments, in sections provided below each employee section
- ✓ Prints an electronic copy of the PDQ
- ✓ Submits the PDQ to HR

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**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 Checklist

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

- A copy of the PDQ training materials (PDF)
- Essential functions worksheet
- Link to the recorded PDQ training webinar
- Current position description or job description (if available)
- Assistance from HR and Segal, if needed
Thank You!

Additional Questions?

Deb
Deb Grigson
Senior Compensation Consultant, Segal
dgrigson@segalco.com

Oberlin Human Resources
OCTotalCompStudy@oberlin.edu
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.
Using the Essential Functions Worksheet

- Use the Essential Functions Worksheet example below to organize your thoughts
- List all activities, duties and tasks of the position 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

<table>
<thead>
<tr>
<th>Duties &amp; Tasks</th>
<th>Related Groupings</th>
<th>Essential Functions Statements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1</td>
<td>Step 2</td>
<td>Step 3</td>
</tr>
</tbody>
</table>

The sample worksheets on the following slides show activities for the position “Administrative Assistant,” but the process can be used for any position.
Position 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

As you read this list, it is hard to determine the overall responsibility or essential function of this position.
Position Title: Administrative Assistant

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

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Appendix

Essential Functions Development Process Steps (Optional)

Step 2

Sort the Duties & Tasks into Related Groupings
## Appendix

### Essential Functions Development Process Steps (Optional)

#### Step 3

**Transfer the Essential Function Statements to the PDQ**

<table>
<thead>
<tr>
<th>Position Title: Administrative Assistant</th>
</tr>
</thead>
</table>

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

Agenda

Process Overview
Supervisor’s Role and Content
Supervisor’s Comments
Supervisor Approval and Submission
Process Overview

1. Employees have only one place where they can weigh in on their role – the PDQ. As the supervisor, you need to provide support for that process.

2. Sometimes you will want to correct their submission; generally, we want you to provide comments to inform HR of important job characteristics that may have been overlooked, understated, or overstated.

3. In rare cases, you will return a PDQ to your employee for updates.

4. If you feel your employee would be surprised by your comments and suggested updates, it’s essential that you tell them in advance what changes you are recommending and why.

Note: the PDQs are being used to create Job Descriptions, and Job Descriptions are being used for career development, pay determination, and job titles. Employees care deeply about these processes.
Overview of the Position Description Questionnaire

**Supervisor’s Role**

- **Manage the process**
  - Your direct reports will submit their PDQs to you by May 13th
  - You will submit your approvals of their PDQs to HR by June 3rd

- **Review your direct reports’ PDQs**
  - Provide comments regarding the content
    - There is a supervisor section after each incumbent entry; be sure to provide a comment if desired and you think it will be helpful. Examples of comments might include “looks good,” “certification is preferred but not required,” “position has more independence than described in Responsibility #1,”
    - Sometimes you will need to write a correction: “While Sue Smith does provide analytic support to me, this is not an essential requirement of the Executive Assistant role, and we can remove the % of time provided for this function from the Job Description.”
      - Because there are other Executive Assistants, there will likely be other changes in the final Job Description.
      - Decide if you should call or email Sue Smith in advance to let her know what’s coming.
  - On the final page of the questionnaire, you will submit the form. Feel free to add comments to your email to HR.

- **Note:** Supervisors cannot change what an employee puts into their sections of the PDQ. This is by design.
Overview of the Position Description Questionnaire

Supervisor’s Landing Screen

- Position List:
  - Allows you to check the approval status of your Direct and Indirect Reports
  - Navigate to your Form / PDQ click **Form** next to your name
  - Navigate to your direct report’s **Form** to provide your input
Overview of the Position Description Questionnaire

Supervisor’s Content

- The first 2 sections: Your Duties and Responsibilities and Position Requirements will be filled out by your employee, and you will provide comments where applicable
- The last section: Supervisor Review Section, you will provide content
Overview of the Position Description Questionnaire

**Supervisor’s Comments**

- We encourage a comment if it’s helpful and appropriate...
- Select Next; the system saves as you use any navigational button
- Submit is only functional on the final page

The position is mainly responsible for...

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The Education and Experience sections do not have a supervisor’s comment boxes

Supervisors have a separate section for Education and a separate section for Experience

Overview of the Position Description Questionnaire

Supervisor’s Comments

<table>
<thead>
<tr>
<th>Position Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Section Overview</strong></td>
</tr>
<tr>
<td>This section asks about the credentials and qualifications needed to do your position, including:</td>
</tr>
<tr>
<td>A. Education</td>
</tr>
<tr>
<td>B. Experience</td>
</tr>
<tr>
<td>C. Certifications and Licenses</td>
</tr>
<tr>
<td>D. Knowledge, Skills, and Abilities</td>
</tr>
<tr>
<td><strong>A. Education</strong></td>
</tr>
<tr>
<td>Please indicate the level of education you think is required and preferred for new employees in the position. Check one item in each column.</td>
</tr>
<tr>
<td>Required education is what someone must have, at a minimum, to be considered for the position.</td>
</tr>
<tr>
<td>Preferred education is what would be good to have, but not necessary.</td>
</tr>
<tr>
<td><strong>Education</strong></td>
</tr>
<tr>
<td>Required?</td>
</tr>
<tr>
<td>High school diploma/G.E.D</td>
</tr>
<tr>
<td>Some college-level coursework</td>
</tr>
<tr>
<td>Technical or para-professional certificate (&lt; 2 years)</td>
</tr>
<tr>
<td>Associate’s or Technical degree (2-Year)</td>
</tr>
<tr>
<td>Bachelor’s degree (4-year)</td>
</tr>
<tr>
<td>Master’s degree, J.D., or similar</td>
</tr>
<tr>
<td>Doctorate/PhD</td>
</tr>
</tbody>
</table>

Specify the major, field, or discipline, if applicable

Can years of related work experience be substituted for education requirements? |
If so, how much experience for each year of education? |
Overview of the Position Description Questionnaire

Supervisor’s Comments

- Key Element:
  - Level of supervision/direction required
  - Read each of the levels to determine the most appropriate
  - Notice the hierarchical nature of the statements
  - Add comments as appropriate

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<table>
<thead>
<tr>
<th>Level of Supervision</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>Immediate Direction</td>
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<tr>
<td>Standard Direction</td>
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<tr>
<td>General Direction</td>
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<tr>
<td>Limited Direction</td>
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</tr>
</tbody>
</table>

Use this space for any additional comments or notes regarding level of supervision.
Overview of the Position Description Questionnaire

Supervisor’s Comments

• Institutional Impact
  – Review each of the levels of Institutional Impact, select the best description
  – Provide comments to support your decision
Overview of the Position Description Questionnaire

Supervisor’s Comments

- Independent Judgment/Problem Solving
  - Review each of the levels of Institutional Impact, select the best description
  - Provide comments to support your decision
Overview of the Position Description Questionnaire

Supervisor’s Comments

• Supervisors restate Education, Experience and Certifications

• Provide the minimum for each credential necessary to be hired into the role

• Pay close attention to identifying where experience can take the place of education or vice versa

• If you and your employee have very different expectations, be sure to review your thoughts with the employee
Overview of the Position Description Questionnaire

Supervisor’s Comments

- Make selections for:
  - Working Environment and Exposures
    - If you select “Office, classroom, or other indoor environment – Frequently or Often,” you do not need to add other Work Environment criteria
    - If you select Seldom or Never or Sometimes or Occasionally, you will need to select the correct radio button for each of the items indicated
  - Physical Requirements
    - Add the requirements for this role based on the identified major duties or essential functions
Overview of the Position Description Questionnaire
Supervisor’s Submission

- This is your final page
- Review and provide any additional content you want and think will be helpful
- Supervisors can “Print” a copy of the PDQ
- HR cannot change the content you or your employee provided in the questionnaire, this is by design
- Click Submit
- Confirm the submission
Thank You!

Additional Questions?

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