Creating Job Descriptions for Non-Represented Titles

Resource Handbook
Student Affairs
(September, 2017)

Creating Job Descriptions for Non-Represented Titles

While the Job Standard selected for a given position is expected to represent at least 50% - 70% of the position, managers and employees should provide brief but specific supplemental customization to support the Job Standard selected when updating/writing a Job Description (JD).

Customized content that is added to the Job Description should be consistent with and support the Generic Scope section of the Job Standard selected. If your customization doesn't do this, perhaps a different Job Standard should be considered. Consult with your HR Business Partner if you have questions.
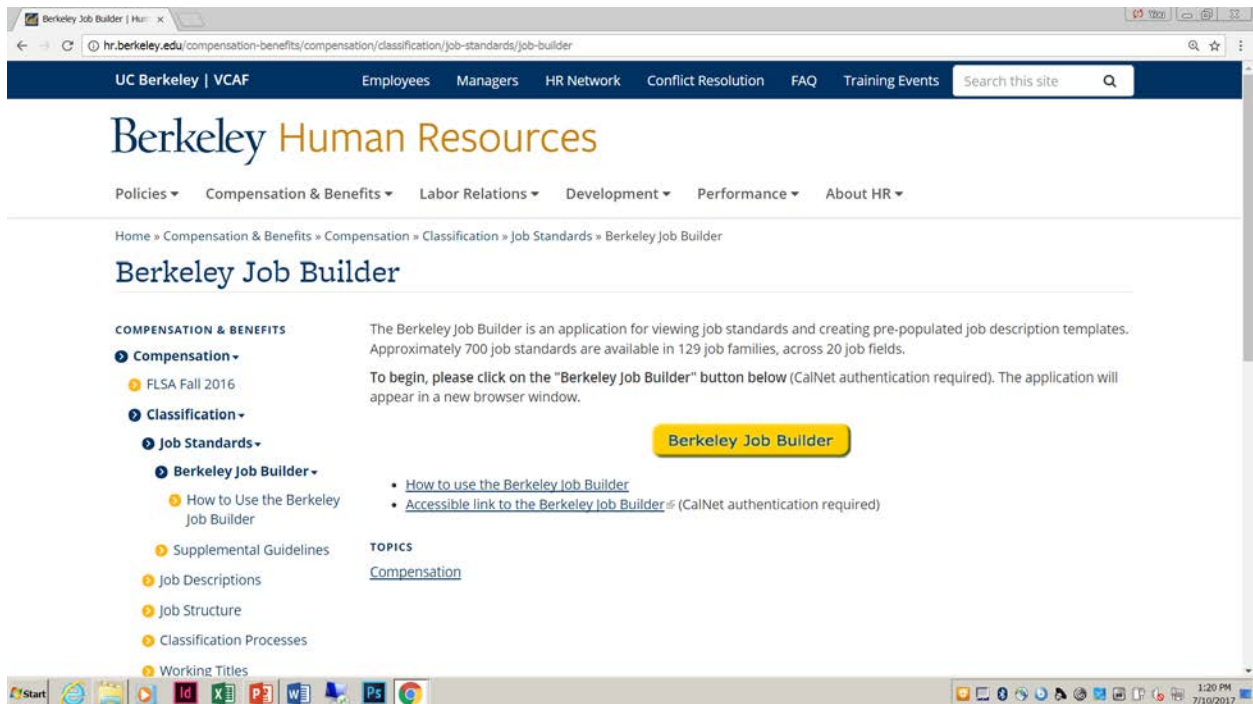
Getting Started

If you have a digital/Word copy of the Job Description you want to update, open it and "save as" a new copy to update, using the following format:

- JobTitle-EmployeeLastName-EmployeeFirstName date you downloaded it (The date will be used for version control once the JD is submitted.).
- Example: FacilitiesMgtSpecialist1-Franklin-David 8-23-17

Turn on Track Changes in the task bar and DO NOT "Accept" the changes when you are complete. It is best if the document shows all the changes as this is easier for reviewers to be able to know what has been added, deleted or changed. Be sure to "save" the document when you close.

If you do not have a digital/Word copy of the job description, or you are creating a new job description, go to the Berkeley Job Builder site: http://hr.berkeley.edu/compensation-benefits/compensation/classification/job-standards/job-builder.

Click on the Berkeley Job Builder button, then sign in with your Berkeley ID.

This will take you to a list of all the Job Fields. Select the appropriate Job Field for your Job Description and click on the "+" to the left. Next, select the appropriate Job Family from the list presented and click on the "+" to the left. If you are not sure which of these is appropriate – contact your Human Resource Business Partner.

This displays 1 – 3 choices of Categories: Operational & Technical; Professional; or Supervisory & Managerial. Select the appropriate Category and click on the "+" to the left. (Note: not all Job Families have all 3 Categories.)

You will see a list of all the Job Standards that are in that Category for that Job Family. Select the one you want to use and click on that Job Title.

This will open the specific Job Standard for that position. To begin creating your customized job description scroll to the bottom of that page and click on *Create Job Description (MS Word)*.

When the document opens, <u>ensure that Track Changes is turned on</u> and "save as", using the following format:

- JobTitle-EmployeeLastName-EmployeeFirstName date you downloaded it (The date will be used for version control once the JD is submitted.)
- Example: FacilitiesMgtSpecialist1-Franklin-David 8-23-17

<u>DO NOT "Accept" the changes when you are editing your job description document, nor when you "save" it when you are complete.</u> It is best if the document shows all the changes as this is easier for reviewers to be able to know what has been added, deleted or changed.

Customizing Key Sections of the Job Standard

Custom Scope

The custom scope should be expanded to further explain and clarify the level of difficulty, scope and leadership of this specific position, within the context of departmental operations.

Key Responsibilities

A job description submitted for reconsideration should provide a sentence or two for each applicable key responsibility to further illustrate how each job standard responsibility is performed by the incumbent. For example, you may add sub-bullets to provide specific examples of how that responsibility would be performed by a successful employee in that specific position.

It is especially important to provide an accurate and true representation of an individual's job duties because what is described in the job description will be the basis for review on the performance evaluation form. In other words, since an employee's performance expectations will be based on his/her job description, the description needs to accurately define the job.

Problem Solving

To validate the Job Standard level selected, it is extremely important to provide two or three specific and representative examples for each of the following types of problems solved by the employee. See the Appendix Section in this guide for some Problem Solving examples.

<u>Common problems solved by the employee</u> – this section provides insight into the most typical, representative types of decisions made by the employee in this position

<u>Less frequent and more complex problems solved by the employee</u> – this section provides insight into the most complex problems solved by the employee in their position

<u>Problems/situations that are referred to this employee's supervisor</u> – this section provides insight into the types of problems that are beyond the scope of this position and need to be referred to a manager of the function

All examples should support the decisions expected of the category and level as defined by the generic scope (i.e., Professional 4: decision making examples aligned with a technical leader demonstrating specialized expertise and resolution of unique issues; Manager 3: managerial decisions demonstrating oversight of subordinate organizations through different levels of managers, supervisors, and professionals.) The definition of the job levels can be found at <u>Compensation: Categories and Levels</u>.

Further detail regarding job levels is provided in the FAQ sections that address level differences for Professional and Supervisory/Managerial jobs. (See Online Resources on page 8.)

Job Description Writing – Helpful Hints/Bests Practices

A complete, concise, and accurate job description will help classify each position and will serve as the basis for recruiting, training, and evaluating employees and as a guide for developing performance expectations.

A well-written job description should be easily understood by anyone who reads it - not only by those familiar with the position. Some technical abbreviations, language, or documentation unique to the unit may be quite understandable when used within the unit, but might require further explanation for classification. When writing a job description, always be clear, concise, and complete.

Revise job descriptions as jobs change (vacancy, during performance evaluation, re-org).

A results-oriented description explains why functions are performed and allows you to more effectively manage the objectives of the position; it also helps the Compensation Consultant evaluate the position more quickly and effectively.

Set consistent performance standards designed to meet business needs. For current employees, be sure to compare required job responsibilities vs. actual duties being performed. Are some tasks "nice to do"? Versus a real business need? Sometimes

job tasks expand to include work the employee likes to do, or leverages the specific skills of an employee – but are not "required" for that job.

Describe how the job should be performed at an acceptable level, not how the current incumbent performs the job (in other words, describe the job, not the individual).

Remember that the job duties and other requirements documented in the description will be the basis for evaluating performance at the next performance review cycle.

Use active verbs rather than vague or general verbs to accurately describe the incumbent's role. For example, "Participates" in a given task doesn't provide an accurate picture of the role performed by the incumbent. Another example is: arrange meetings vs. convene work groups vs. design, develop, and facilitate work groups.

Describe time spent performing the most important 6 - 8 essential duties in increments that add up to 100%. Elaborate on these by looking at the day-to-day of the employee over the course of a 12 month period to account for-- but not overemphasize-- peaks and valleys in business cycle

- *Do not list the same % for each Key Responsibility as this usually does not reflect the actual work. And, do not list Key Responsibilities below 5%.*

Write the job descriptions as broadly as possible to build in flexibility to meet needs of the department without having to rewrite the description to reflect *minor changes.*

While the generic scope never changes, you can customize the job summary and custom scope as necessary.

Distinguish between time spent on supervisory vs. individual contributor activities (most important in manager/supervisor classifications)

Appendix

Examples of Problem Solving Statements

Financial Analyst
Common problems solved by the employee:
- Assist faculty in development of a complex budget for a multi-year spending plan. This typically involves working independently to research current and potential salary and benefit ranges for the applicable job titles, estimating supply and travel expenses based on historical trends for similar activities, and creating a spreadsheet that integrates the resulting budget numbers into the forms required by the faculty and CSS for decision making. This may involve multi-linked Excel spreadsheets, and creation of custom BAIRS reports using pivot tables to track past expenditures.
- Review ledgers across a full dept ID to discover deficits and mistakes; taking proper action to resolve or instructing others on needed action.
- Monitor and document SAS115 compliance for faculty funds across many departments
- Answer questions from or disseminate/clarify information to unit team members on campus policy and procedures.

Less frequent and more complex problems solved by the employee:
- When the implementation of a new or revised campus-wide system (such as Bear Buy, BFS,) affects the administration of faculty funds, the incumbent apprises the unit manager of any issues so that they can be brought to the attention of appropriate campus staff for resolution.
- A faculty with no alternative funding has a deficit; the incumbent must work with the faculty and their department to find funding to cover the cost and insure that no other obligations are made.

Problems/situations that are referred to this employee's supervisor:
- Anything with potential ethical or legal issues, along with potential recommended solutions.
- Situations outside the incumbent's experience that involves sensitive issues with other campus units, along with a contemplated approach for discussion.

Research Administrator
Common problems solved by the employee:
- Interprets non-routine sponsor guidelines.
- Resolves complex issues with central campus offices and sponsors
- Works with less experienced research administrators to address complex issues with agencies, faculty, researchers or campus offices.

Unusual or complex problems solved by the employee:

- Assists in the improvement of complex processes such as financial reporting and forecasting.
- Contributes ideas that have the potential to impact established policies and procedures.
- Communicates with faculty member when faculty member is in disagreement with agency and/or UC policies/procedures.

Problems/situations that are referred to this employee's supervisor:
- Hiring, Termination, Grievances, etc.
- Faculty misuse of funds.
- Faculty member in disagreement with decision made by Incumbent.
- Policy issues that must be negotiated with central offices after resolution not possible.

Project Policy Analyst 2

Common problems solved by the employee:
- The employee must respond to parents or students that may be frustrated with an academic or personal issue and is looking for the senior leader to solve their issue.
- The employee is asked to manage multiple high-level projects simultaneously from the leaders and must prioritize and communicate which project will come first if both cannot happen within the same time frame.
- The employee is asked to analyze current protocols in the senior leader suite and must provide critical feedback to make changes and work with Deans to revamp and implement.

Less frequent and more complex problems solved by the employee:
- A call comes in to the office reporting that a student is in the hospital and not doing well, the guardians of the student want to know what their options are if the student's medical situation becomes progressively worst. The employee must be knowledgeable regarding protocols that relate to students and or be resourceful in getting the information.
- The media is calling the office trying to get information regarding a recent event that happened on campus that the leaders are currently managing. This employee must know the context of the matter and how to escalate appropriately
- A student comes into the office and reveals information regarding a traumatic experience that is report able to the Title IX office. This employee must understand the process for these types of matters and inform the student on appropriate next steps, and available resources

Problems/situations that are referred to this employee's supervisor:
- A student who is in distress and has left potentially threatening messages on the office phone.
- The Chancellors/ Vice-Chancellors Office wants the senior leader to solve a current issue quickly.

Online Resources

Compensation Website
http://hr.berkeley.edu/compensation-benefits/compensation

Frequently Asked Questions
http://hr.berkeley.edu/faq/compensation

Berkeley Job Builder
http://hr.berkeley.edu/compensation-benefits/compensation/classification/job-standards/job-builder

Job Family Descriptions
http://hrweb.berkeley.edu/files/attachments/JobFamilyDescriptions.pdf

List of Verbs, With Definitions (A resource when writing Job Descriptions)
https://docs.google.com/document/d/1-tqpXjvM0zql0kTQDqkxpi0iQRrmnk6_sBjbDpVeUu4/edit?usp=sharing

CSS Service Delivery Contact List Student Affairs		October, 2017	
		Business Partner	
		Primary HR Partner	**Secondary HR Partner**
Office of the Vice Chancellor - Imm. Office		Suzanne Krivoy	Jerry Nazareta
	SAIT	Jerry Nazareta	Suzanne Krivoy
	Communications	Suzanne Krivoy	Jerry Nazareta
	Business Operations	Kristin Davi	Roy Cockrell
	Administration	Kristin Davi	Roy Cockrell
	Finance	Suzanne Krivoy	Jerry Nazareta
Admissions and Enrollment - Imm. Office		Suzanne Krivoy	Javier Gonzalez
	Cal Student Central	Suzanne Krivoy	Javier Gonzalez
	Financial Aid & Scholarships Office	Suzanne Krivoy	Javier Gonzalez

	Office of the Registrar	Suzanne Krivoy	Javier Gonzalez
	Undrgraduate Admissions	Suzanne Krivoy	Javier Gonzalez
Dean of Students - Imm. Office		Roy Cockrell	Jerry Nazareta
	ASUC Student Union	Roy Cockrell	Javier Gonzalez
	Career Center	Javier Gonzalez	Roy Cockrell
	New Student Services	Roy Cockrell	Javier Gonzalez
	Public Service Center	Suzanne Krivoy	Javier Gonzalez
	Student Conduct	Roy Cockrell	Javier Gonzalez
Residential & Student Services Program			
	Office of the AVC (Cal1Card included)	Kristin Davi	Roy Cockrell
	Facilities & Housing Services	Javier Gonzalez	Kristin Davi
	Facilities & Housing Services - UVA	Kristin Davi	Javier Gonzalez
	Office of the AVC (Cal1Card included)	Kristin Davi	Roy Cockrell
	Residential Education	Javier Gonzalez	Roy Cockrell
	ECEP	Kristin Davi	Jerry Nazareta
	Cal Dining	Roy Cockrell	Javier Gonzalez
UHS		Laurie Pangelina	Edward Brown
Recreational Sports		Jazmine Castaneda	Rob Frederickson

Administrative Assistant 1
Instructions for Reclassifications or Creating a New Position
(Job Description Template begins on next page)

Instructions:

1. The "track changes" feature has been activated in this job description template. **Keep the "track changes" functionality activated in the final submitted copy.**

2. Edit all pre-filled information below to specifically reflect the employee's current responsibilities, with the exception of the following sections which *do not* change: Job Title, Job Field, Job Family, Job Category, Job Level, and Generic Scope.

3. **Provide a copy of the most current department organization chart.**

4. Submit this position description to the Compensation Unit for review prior to posting the position for recruitment.

5. Once the final job description has been approved by the Compensation unit, please remember to keep a final copy of the job description in the employee's personnel file. The job description should be a clean copy of the approved job description (accept track changes) and should **not** include this instruction page. **Delete this instructions page before saving the final version for the personnel file.**

Important Notes:

A. Reclassifications

- **Is this a reclassification request?** Yes _____ No _____
  If yes, please briefly describe (no more than 2 paragraphs) the significant changes that have taken place since the position was last reviewed. Additionally, please provide a copy of the former job description for the position and the former and current organization charts.

- **Is this position currently represented by a bargaining unit?** Yes _____ No _____
  If yes, please list below (in Section C) the represented duties no longer being performed, as well as the names and payroll titles of the employee(s) who are now performing those represented duties.

B. Vacant or New Positions

- **If this is a vacant or new position, has any portion of the listed duties been previously performed by a position(s) in a bargaining unit within the last 2 years?** Yes _____ No _____
  If yes, please list below (in Section C) the duties previously performed by a represented position, as well as the names and payroll titles of the employee(s) who previously performed those represented duties.

C. List Represented Duties, Names, and Payroll Titles (if Yes was checked in Sections A or B above)

- Duties previously performed by a represented position:

- Bargaining Unit employees who are now performing or previously performed represented duties:

NAMES   **PAYROLL TITLES**

_____   _____

_____   _____

_____   _____

REMINDER: The section above is used for classification purposes when submitting a Job Description to Compensation. It should **not** be included in the final job description for the employee's personnel file.

JOB DESCRIPTION TEMPLATE BEGINS ON NEXT PAGE

Administrative Assistant 1

Job Description

Name:		**Employee ID:**	
Department:		**Division:**	
Current Payroll Title:		**Job Code:**	TBD
Job Title:	Administrative Assistant 1	**Recommended Working Title:**	
Job Field:	General Administration	**Job Family:**	Administrative Operations
Job Category:	Operational & Technical	**Job Level:**	Level 1
Supervisor Name:		**Submission Date:**	

1. Job Summary (Purpose of the Position – please give a brief description of the overall purpose of the position. "Why does this position exist?" The Job Family Summary has been provided as a starting point.)

Involves managing or performing the administrative services or managing the full general operations of an academic or non-academic organization(s). Administrative services includes activities in finance and human resources and may also include IT, facilities, or student services. General management includes long and short range strategic planning in determining the mission and directing all activities of multi-disciplinary departments through subordinate management staff.

2. Scope

Generic Scope (Uniform across all jobs at this level - do not modify):   Applies basic skills while developing some specialized skills in procedures, operations, techniques, tools, materials, and/or equipment appropriate to area of specialization; performs routine and/or repetitive tasks; limited decision making required; generally works under close supervision; has no or limited experience; work is performed from within specific limits of established procedures and/or defined instructions.

Custom Scope: Under direct supervision works on operational and/or procedural assignments that are routine in nature, requiring limited judgment. Normally receives detailed instructions on all newly assigned work. Performs ongoing routine assignments with general supervision.

3. Key Responsibilities (Indicate key functions and the estimated percentage of time spent performing each function. If there are more than 10 key responsibilities, some of the similar functions may be grouped together and an estimated % applied. Please indicate which responsibilities are considered "essential" to the successful performance of the job as defined by the Americans with Disabilities Act. Visit the Career Compass Glossary for an explanation of essential functions: http://careercompass.berkeley.edu/jobstandards/resources/glossary.html)

If applicable, describe the position's role in planning the programs, functions, activities, and processes of the organizational unit to achieve unit goals and objectives.

% of time	Essential Function (Yes/No)	Key Responsibilities *(To be completed by Supervisor)*
0		Compiles basic information for inclusion in reports or presentation materials.
0		Using templates, straightforward materials and data, applies standard office software programs to prepare memoranda, letters, charts, graphs, and/or tables
0		Compiles and prepares routine factual reports from readily available information.
0		Prepares manuscripts, scientific and technical reports, proofing for spelling and grammar.

0		Orders office supplies, prepares purchase orders; may obtain sourcing and pricing information.
0		Maintains routine calendar, schedules meetings, arranges for routine audio visual and other equipment. Makes straightforward travel arrangements.
0		Makes and cancels appointments.
0		Provides information on department/college/campus procedures and straightforward policies.
0		Maintains files, screens and distributes mail.
0		Posts financial data on ledgers and spreadsheets; reconciles ledgers when reconciliation is straightforward. Prepares status reports.
0%		*(To update total %, enter the amount of time in whole numbers (without the % symbol - e.g., 15, 20) then highlight the total sum (e.g., 1%) at the bottom of the column and press F9. The total sum should add up to 100 %.)*

4. Knowledge and Skills
- May have basic knowledge in administrative procedures including word processing, spreadsheet and database applications.
- Requires basic verbal and written communication skills, active listening, and time management skills.

5. Education and Training
If needed, edit the pre-filled information below.

Education/Training:
- High school diploma or equivalent experience

Licenses or certifications, if any:

6. Problem Solving
Please provide 2-3 examples of problem solving for this position as described below (please be brief: 1-3 sentences)

Common problems solved by the employee:
-
-
-

Less frequent and more complex problems solved by the employee:
-
-
-

Problems/situations that are referred to this employee's supervisor:
-
-
-

Please follow your department's or division's procedures for management review and then submit to your Department HR Manager.

Document Retention

Review the job description with the employee before submitting it and annually thereafter at the time of the employee's performance evaluation. Sign and date below and place a copy in the personnel file.

(Signature below is only required for hard-copy retention within the department. Electronic submission does not require signatures.)

Supervisor Name: _____   **Supervisor Title** _____

Employee Signature: _____   **Supervisor Signature:** _____

Date: _____   **Date:** _____

The following employees have identical job descriptions:

_____   _____

_____   _____

_____   _____

_____   _____

_____   _____

Job Description Writing Exercise

Directions: Please write 1-2 examples for each section below – as if you were writing/updating a job description for yourself, or an employee reporting to you.

Scope

Key Responsibilities

% of time		

Problem Solving

Common problems solved by the employee:
Less frequent and more complex problems solved by the employee:
Problems/situations that are referred to this employee's supervisor: