



A Guide on How to Write Support Staff Position Description Forms

Guide de rédaction des formulaires de description de tâches du personnel de soutien



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Introduction

This Guide is to provide assistance to supervisors and employees writing Position Description Forms (PDFs) and should not be relied upon in the interpretation of the Support Staff Job Evaluation Manual or the Support Staff Collective Agreement.

What is a PDF?

A position description is a descriptive list of functions, tasks, responsibilities, working conditions, skills and knowledge needed for a particular job.

Who needs a PDF?

A PDF is required for all full-time Support Staff bargaining unit positions.

A generic PDF may be developed for positions that have similar duties and responsibilities

Your College's internal procedures should be checked to determine if additional steps or documentation are required when submitting a PDF for evaluation.

Whose responsibility is it to write the PDF?

Article 3 "Management Functions" of the Support Staff Collective Agreement, acknowledges that Management has the right to determine complement, services to be performed, scheduling of assignments and work, and generally to manage the College.

Therefore, one of a supervisor's key duties is to determine the structure, duties and responsibilities of the Support Staff position and ensure that the PDF accurately reflects the duties that have been assigned to the position.

Ideally, both the supervisor and the incumbent should be involved in writing the PDF. Supervisors have the responsibility to assign the work and to determine what needs to be accomplished. Incumbents know what they do on a daily basis. Working together, they can:

- capture a more complete and accurate picture of the position;
- ensure that the key duties and responsibilities are being performed appropriately;
- gain a better understanding of the position's objectives and discuss ways these are best met.

Reasons for Position Descriptions

A position description can be used for many purposes - therefore it is important when you are writing it to think about its uses and the various people who will be reading it in order to gain an understanding of the job.

Job Evaluation and Compensation

- provides the necessary information for evaluating a position so that a payband can be assigned

Recruitment and Selection

- provides the job duties information necessary for the job posting
- provides the job-related information needed to develop selection criteria and interview questions
- helps ensure that the qualifications and related work experience of the potential candidates match the job requirements

Orientation

- helps a new employee understand what is expected of him/her and how the position fits into the organizational structure

Performance Management/Appraisal and Professional Development

- provides the groundwork for establishing performance standards
- establishes accountability and standards for assigned work and for appraising an employee's actual performance
- helps to clarify personal or professional developmental needs
- identifies the ongoing need for the incumbent to stay "current" in their chosen field
- helps determine any training or developmental needs that the incumbent may need in order to meet changes in the job
- identifies organizational needs and determines if gaps exist, so that employees can be trained and developed accordingly

Planning

- ensures that Managers maximize the effectiveness of existing or proposed positions under their direction (eg. organizational structure, reporting relationships) by identifying the key duties and responsibilities and the associated level of authority assigned to positions
- helps in structuring or restructuring a department or organization

Union/Management Relationships

- helps limit grievances by providing documentation that can be consistently evaluated

Overview of the Support Staff PDF

The Support Staff PDF provides a clear and concise word picture of the duties and skills that are required in a particular position.

What does a PDF describes?

- it is a "snap-shot" in time and describes the position as it exists at this moment
- it describes **what** the incumbent does, **how** a duty or task is carried out and **why** it is done
- it describes the job related knowledge and skills needed

What doesn't a PDF describe?

- it does not describe the position as it might appear in the future
- it is not a detailed working procedure
- it is not a list of miscellaneous duties that are infrequently assigned and are not essential to the position
- it does not describe the person in the position

When should a PDF be revised?

PDFs should be reviewed on a regular basis to ensure that it still captures the job content correctly. Ideally, this would occur as part of the regular and ongoing performance appraisal process.

A PDF should be reviewed whenever changes occur in the work that is assigned to determine if revisions are necessary. Revisions may be initiated by either the incumbent or supervisor. Such revisions normally occur due to departmental reorganizations, the introduction of new procedures, the assignment of new responsibilities, or as a result of new emphasis on job functions at a different level.

Suggested Style Technique

Information should be **gender neutral**, written in the **third person singular** and cited in the **present tense** (e.g. *assists* students, *designs* experiment, *types* correspondence).

Abbreviations, trade slang or jargon should be avoided whenever possible. Proper names of all operations, departments or equipment should be used.

Only approved position titles should be used when referring to other positions or individuals.

Use of verbs and action words refer to in the Glossary at the end of this guide.

Care should be taken in the selection of verbs to describe the level or degree of action required as the differences in meaning can easily result in different understandings about the work to be performed and expected outcomes. To assist you, a glossary of action words and their associated definition is included in this Guide.

Specific Information that is Captured

This PDF collects information about:

- the key duties and responsibilities assigned to a position along with the respective time spent annually
- minimum level of formal education required
- additional educational requirements
- minimum level of experience needed
- analysis and problem-solving skills
- organizational and/or project management skills (planning and coordinating)
- level of guiding/advising that has been assigned to the position
- degree of independence of action and decision-making assigned
- service delivery
- communication skills, verbal and written, formal and informal
- physical demands
- audio/visual demands
- working environment

Regular & Recurring and Occasional

Eight sections in this PDF collect information about "**regular & recurring**" and "**occasional**" activities or responsibilities. In either category, the example(s) you provide must relate to a **significant or core duty/responsibility**. In other words, regardless of whether the skill or responsibility occurs on a "regular & recurring" or "occasional" basis, it must be important enough that without it the position duties could not be performed.

What is regular & recurring?

This term is not readily identifiable as a specific amount of time. If a task is required to be performed on a daily or weekly basis it is easily seen as "regular & recurring". However, at times, the "regular & recurring" tasks of the position may not be as evident. For example, a task that occurs once or twice a year - every year - and requires a significant portion, if not all, of an incumbent's time over an extended period should also be recognized as "regular & recurring". Any task or responsibility that is an integral part of the position's work and is expected to be consistently relied on should be considered "regular & recurring".

What is occasional?

This term needs to be considered in a few different time frames. "Occasional" is used when **significant** activities occur for a short period of time, on a few occasions or sporadically throughout the year. If a task occurs for a limited amount of time and it is not a significant differentiating element, do not include it as an example of "occasional".

For example, if a duty occurs 5% of the time and it is a notable element of the position, it should be described under the "occasional" heading. However, if the duty occurs about 5% of the time and it is not an important distinguishing element, it is not meaningful nor helpful to use it as example under the "occasional" heading.

Completing the PDF

The following information will provide you with guidelines and helpful hints on how to complete each section of PDF.

Where appropriate, examples have been provided to illustrate the type of information that should be included in each section. The examples provided are typical of jobs at the Colleges. A position used as an example to illustrate "Duties and Responsibilities" has not necessarily been used in other examples.

Job Identification Data

This information is contained on the front page of the PDF and identifies the position, the incumbent and the supervisor.

- College* - name of the College
- Incumbent's Name* - name of the employee in the position
- leave blank if the position is vacant
- Position Title* - assign a title that correctly identifies the position
- jobs with similar duties and responsibilities should have the same title
- titles should not allude to gender and should be kept current
- Payband* - assigned to the position through the evaluation process
- Position Code/Number (if applicable)* - the identification number that is assigned to a position by the College
- Supervisor's Name and Title* - the name and title of the Supervisor who the employee directly reports to
- Completed By and Date* - indicates the name of the person who wrote the PDF and the date the PDF was written or modified
- Signature of the Incumbent and Date* - indicates that the incumbent has read and understands the PDF
- does not indicate that the incumbent is in agreement with the PDF
- Signature of the Supervisor and Date* - this space is provided for the signature of the person who approves the PDF (first level of approval) eg. the direct supervisor of the incumbent
- Signature of the Supervisor's Supervisor and Date* - this space is provided for the signature of the person who approves the PDF at the second level

Position Summary

This section provides a brief overview of the position. The summary is usually 2 - 3 sentences describing the major or significant aspects of the job.

You may want to **complete this section last**. Completing other sections of the PDF first may help you to clarify and organize your thoughts, making this section easier to complete.

Duties and Responsibilities

This section records the duties and responsibilities of a position along with the corresponding percentage of annual time spent.

What are responsibilities?

Responsibilities identify the primary reasons for the existence of the position. These are the major or broad categories of work that define the scope of the work assignments. A responsibility should be of sufficient importance that it reflects an activity that must be performed in order to achieve the required outcome or result.

Depending on the scope and complexity, most jobs will require three to seven major responsibilities assigned to a position. Possibly, though infrequently, there could be as many as nine responsibility statements required to completely describe all the duties. Responsibility statements contain more detail than the Position Summary section. The scope and specifics of the responsibility statements will vary according to the complexity of the position.

After developing a list of responsibility statements, you should review them by asking the following questions:

- a) Do these statements adequately describe the purpose of the position?
- b) Are all key responsibilities listed?
- c) Can any be omitted or combined?
- d) Is it possible to clarify the statement?

What are duties and tasks?

Duties and tasks describe a responsibility. They should explain in detail how the position's responsibilities are to be carried out on a day-to-day basis. Typically, duties describe **what** is done and **why** it is done. They establish the foundation for the setting of performance standards.

Suggested way to format responsibility and duty statements.

A way to make this section easier to read and understand is to first list the responsibility and then underneath it, list the associated duties and/or tasks (Example 1 demonstrates this style technique).

The following are possible ways of organizing responsibility and duty statements on the PDF:

- a) list the responsibility and associated duties by sequence of occurrence. For positions that have a routine order of occurrence of work activities, the best way to structure the responsibility and duty statements is to list the responsibility that normally occurs first then list the remainder in sequential order. The same procedure can be used for listing the duties within each responsibility.
- b) list the responsibility and associated duties in order of their importance relative to the overall successful performance of the job. For positions in which the activities do not occur in any natural order but must meet specific demands as they arise, you may find the "importance" approach of structuring more suitable.

Assigning time spent

For each responsibility and/or duties, the percentage of time spent **annually** must be assigned. The percentage total cannot exceed 100% for all assigned duties.

The activity levels of all tasks are, of course, not always consistent. Since many jobs have activity levels that fluctuate, percentages of time should reflect an estimate of the spent on an annual basis. For example, over the course of a year, 90% of the time may be spent on a given job function during a specific period of time, while at other times the activity may diminish to 8 - 10%. When smoothing this over the period of a year, this job function may be recorded as 40% on the PDF.

To help you estimate percentages, these guidelines should be used.

- ½ hour/day is 7%
- 1 hour/day is 14%
- 1 hour/week is 3%
- ½ day/week is 10%
- ½ day/month is 2%
- 1 day/month is 4%
- 1 week/year is 2%

To allow some flexibility to be built into the job, it may be useful to conclude with the sentence *"Performs other related duties as assigned"*. As a guideline, the percentage assigned should not exceed 5%. Do not use this as a way to capture "occasional" activities.

Examples of Duties and Responsibilities

Example 1

1. *Admits new students by:* 50%
 - *determining applicant eligibility for admission to College programs, issuing offers of admission and advising unsuccessful applicants of an alternative course of action*
 - *scheduling testing and making referrals where appropriate*
 - *registering students in courses and programs and collecting and processing the appropriate fees*
 - *monitoring and controlling student intake in order to meet College enrolment targets without exceeding class capacities*

2. *Administers academic and financial policies by:* 20%
 - *processing all documentation pertaining to admissions, registration, fee payments, course and program changes, withdrawals, refunds and grades*
 - *investigating and resolving process anomalies*
 - *maintaining ongoing liaison with academic advisors to ensure conformance with academic rules and regulations*
 - *advising students regarding the application and interpretation of college policies*
 - *granting advanced standing requests by validating instructional credentials, assessing academic documentation, and ensuring appropriate credits and content matches*

3. *Monitors and records student progress by:* 20%
 - *creating, organizing and maintaining accurate and timely official electronic and hard copy records for all students*
 - *conducting credit checks and diploma audits to ensure eligibility for promotion and graduation*
 - *certifying enrolment information for audit, funding and Ministry reporting purposes*

4. *Analyzes systems and procedures by:* 5%
 - *debriefing after major events, such as admissions cycle stages, registration and recommending improvements to accommodate changing academic conditions*
 - *providing ongoing input into academic policy review process*
 - *undertaking special assignments related to registration systems and procedures*

5. *Other related duties as assigned.* 5%

- Total* 100%

Example 2

1. <i>Performs caretaking duties such as cleaning, dusting and maintaining cleaning equipment; picking up litter on College grounds; basic security; and window cleaning</i>	40%
2. <i>Assists kitchen/cafeteria staff as required by loading milk machines; emptying rubbish; mopping up spills; and cleaning kitchen equipment</i>	30%
3. <i>Recycles cardboard, plastics and glass. Collects materials for composting.</i>	15%
4. <i>Provides direction and guidance to junior caretakers.</i>	10%
5. <i>Performs other related duties as assigned.</i>	5%
<i>Total</i>	<i>100%</i>

Section 1 Education

There are two subsections under the heading of "Education":

- the level of formal education required
- additional education that is required which is not normally obtained as part of the primary educational level noted above.

Part A - Primary Education Level

In this subsection you check the box that records the **minimum** level of formal education that is required to perform the responsibilities of the position. This would be the hiring standard used in recruitment and selection.

In the area provided, note the field(s) of study or the trade certification that is required.

Hints

Check the educational level required **for the position**. This could be the same or very different to the educational level of the person presently in the position.

Use **today's educational levels and standards**. It is the level of knowledge normally gained through "today's" standards which must be measured. This would mean that for most levels of education, basic computer skills, such as word processing and spreadsheets would be part of mastering that educational level.

Part B - Additional Education

In order to perform the responsibilities of the position, there might be a requirement for specific course(s), certification, qualification, formal training or accreditation **in addition to** and not part of the educational level noted above in 1A. Include only requirements that are needed prior to assuming the position responsibilities that would typically be included in the job posting.

Hints

Do not include course(s) or certification that are part of the formal education referenced in 1A above. For example, if a 1-year certificate is required - do not list additional computer courses, such as electronic spreadsheet, if that skill or knowledge would be part of the 1-year certificate.

Use today's educational levels and standards to determine whether the additional requirement is included in the formal education referenced in 1A or should be listed in 1B.

A 10 week continuing education course would be approximately 30 hours (10 weeks x 3 hours/week = 30 hours). A 15 week course over

a semester would be about 45 hours (15 weeks x 3 hours/week = 45 hours). If multiple courses are required, add the total hours for each course together to determine the appropriate box to check.

Do not include any sessions, seminars or training that are required after an incumbent is hired, such as familiarization sessions on internal processes, email, or computerized record systems.

There are many professions that require an individual to renew his/her licence on a regular basis (e.g. nursing). Courses taken to maintain a professional designation are not considered under this section.

Section 2 Experience

Experience relates to the minimum work experience needed to gain the knowledge on how to apply the skills and techniques necessary to perform the job.

Check the box that best reflects the **minimum** number of years of work experience required on the first day of work. The practical work experience should be reflective of, and consistent with the requirements of the position. This could be the same or different from the experience of the person in the position.

Hints

The type of experience needed should be reflective of the position and not be a "shopping list" of desirable talents. When listing technical experience, describe the transferrable skill that is required and not the commercial or brand name. For example, proficiency with a word processing package is transferrable and does not require specific experience with a particular software package. Reference should only be made to a specific computer product when it is an absolute requirement (e.g. only individuals with this experience would be considered for the position).

Do not include any work experience that is part of a certification process as this has been taken into consideration in the "Education" section.

If multiple levels of experience are needed in different disciplines then record the total number of years experience and provide an explanation in the area provided.

Do not include field time required for membership in a professional organization, designation or requirements for a license.

Section 3 Analysis and Problem Solving

Analysis and problem solving looks at the steps and complexity involved in identifying and analyzing situations, information or problems. It also examines the judgement required to develop solutions or other corrective actions that are required and what sources are available to assist the incumbent in the analysis and problem solving.

Hints

Select up to 3 examples that are a "regular & recurring" component of the position. There is also an optional section for two examples that occur on an "occasional" basis.

List the key issue or problem and answer the questions in the PDF as they relate to that key issue or problem. The examples selected should reflect typical situations that are encountered. Make sure that it is reflected in the "Duties and Responsibilities" section of the PDF.

Examples of Analysis and Problem Solving

#1 regular & recurring

Example 1

Key issue or problem encountered	<i>Equipment not cleaning properly</i>
How is it identified?	- <i>equipment doesn't clean properly or will not operate</i>
Is further investigation required to define the situation and/or problem? If so, describe.	- <i>check to see if the equipment is plugged in</i> - <i>check to see if equipment needs to be cleaned or repair needed, for example, if equipment needs to be repaired is it minor or will it require servicing?</i>
Explain the analysis used to determine a solution(s) for the situation and/or problem	- <i>start with the most obvious problem and solution and then work through a "check list" of possible situations</i> - <i>visual inspection usually identifies the problem</i> - <i>if solution is within position's expertise then incumbent proceeds to resolve (eg. cleans machine); otherwise the problem and a possible solution, if one, are referred to the supervisor (eg. machine needs to be sent for servicing).</i>
What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).	- <i>operating manual for equipment</i> - <i>past practices - has this happened before - what was the problem/solution</i> - <i>coordinator or supervisor</i>

Example 2

#1 regular & recurring

Key issue or problem encountered	<i>Client does not have enough employees to make the training program for one client viable.</i>
How is it identified?	- <i>upon discussion with the client and further research when developing training program</i>
Is further investigation required to define the situation and/or problem? If so, describe.	- <i>incumbent determines available trainers and curriculum</i> - <i>assesses the time and resources needed versus the cost to deliver</i> - <i>determines ways to make cost effective</i>

Explain the analysis used to determine a solution(s) for the situation and/or problem	<ul style="list-style-type: none"> - <i>determines if other clients in the area have a need for similar training</i> - <i>determines if program can be delivered at the College by leasing equipment or at a client's premises with other clients' employees attending or if third party can deliver</i>
What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).	<ul style="list-style-type: none"> - <i>project files for similar situations</i> - <i>other consultants</i> - <i>department/college policies</i> - <i>training standards; industry standards</i>

#2 regular & recurring

Key issue or problem encountered	<i>Customer feedback is negative regarding a specific trainer who delivered a program</i>
How is it identified?	<ul style="list-style-type: none"> - <i>evaluation forms; follow-up with client and participants</i>
Is further investigation required to define the situation and/or problem? If so, describe.	<ul style="list-style-type: none"> - <i>meeting with client to identify exact issue/problem (eg. was the problem the way in which the program was delivered versus expertise of the trainer)</i> - <i>discussion and follow-up with trainer</i> - <i>review past sessions delivered by trainer</i> - <i>review promised deliverables in training program</i>
Explain the analysis used to determine a solution(s) for the situation and/or problem	<ul style="list-style-type: none"> - <i>based on outcomes from above; redesign the training program and method of delivery or recommend ways the trainer can improve his/her delivery method or recommend the trainer not be used in future</i>
What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).	<ul style="list-style-type: none"> - <i>past practices - has this happened before - what was the problem/solution</i> - <i>adult training practices</i> - <i>departmental guidelines</i>

Section 4 Planning / Coordinating

This section examines the organizational and/or project management skills that are required to bring together and integrate activities and resources (human, physical and materials) needed to complete tasks or organize events.

Consideration should also be given to whether the incumbent has the assigned responsibility to plan/coordinate the tasks of others, which affects those individuals' work schedule.

Hints

Select up to 3 examples that are a "regular & recurring" component of the position. There is also an optional section for two examples that occur on an "occasional" basis.

Tasks could include assignments such as completing month-end, year-end financial records, cleaning facilities, producing reports, etc.

Events and activities could include items such as conferences, research or special projects, convocation, upgrading hardware and software, etc.

Examples of Planning / Coordinating

#1 regular & recurring

Example 1

List the project and the role of the incumbent in this activity.	<i>Investigation of a new technology/software - the incumbent would be assigned to lead a group of three.</i>
What are the organizational and/or project management skills needed to bring together and integrate this activity?	<ul style="list-style-type: none"> - <i>ability to coordinate activities; to ensure team is not repeating others' work</i> - <i>assign tasks based on the expertise of the project members</i> - <i>must be able to break large plan into manageable smaller plans</i>
List the types of resources required to complete this task, project or activity.	- <i>based on work plan - determine if additional resources are needed (eg. does the team have all the expertise needed or do other specialists need to be brought in)</i>
How is/are deadline(s) determined?	- <i>normally, incumbent is asked to provide a proposed deadline based on knowledge of the project</i>
Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.	<ul style="list-style-type: none"> - <i>incumbent makes the necessary adjustments to the project, providing that it stays within original approved specifications</i> - <i>exceptions would be referred to Supervisor</i>

#2 regular & recurring

List the project and the role of the incumbent in this activity.	<i>Upgrade to hardware in an administrative office area. In this project, the incumbent acts as a resource to another project team.</i>
What are the organizational and/or project management skills needed to bring together and integrate this activity?	- <i>incumbent provides his/her expertise as required by the project team; must be able to manage these requests within his/her own workload demands</i>
List the types of resources required to complete this task, project or activity.	

How is/are deadline(s) determined?	- <i>deadline is established by project team</i>
Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.	- <i>requests from the project team for the incumbent's help may cause the incumbent to reprioritize own work</i>

#1 occasional

List the project and the role of the incumbent in this activity.	<i>Hardware and software renewal of existing labs. The incumbent leads a group of other technical experts in this project, which is done every 3 years.</i>
What are the organizational and/or project management skills needed to bring together and integrate this activity?	<ul style="list-style-type: none"> - <i>detailed work plans are developed with tasks and activities assigned by the incumbent to others in the project</i> - <i>each member is responsible for the completion of assign task, with the incumbent coordinating activities and ensuring appropriate steps and target dates are met</i> - <i>regular meetings/updates are held to insure project stays on time; incumbent determines if and what adjustments are necessary to ensure project stays on time</i> - <i>incumbent must be able to integrate the work styles of others and resolve minor conflicts</i>
List the types of resources required to complete this task, project or activity.	<ul style="list-style-type: none"> - <i>human resources - determine if project team has the expertise and time or whether additional staff will need to be brought in (when, how long, skills needed, etc)</i> - <i>physical resources - space to store all new equipment; how will equipment (old and new) be tracked; ensure old equipment is disposed of appropriately (eg. returned to initial vendor, part of upgrade proposal, etc).</i>
How is/are deadline(s) determined?	<ul style="list-style-type: none"> - <i>the end date is determined by the academic schedule; for example all upgrades and testing must be completed by mid August so that labs are available when students return</i> - <i>incumbent establishes tasks/milestone deadlines and makes adjustments to ensure overall deadline is met</i>

<p>Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.</p>	<ul style="list-style-type: none"> - <i>the incumbent will determine if changes are required within the scope of the assignment (eg. do other vendors need to be sought out to provide quotes on work to be done)</i> - <i>the incumbent will make adjustments to other teams members' schedules or workload to ensure target deadlines are met</i> - <i>changes outside the scope of the assignment are referred (usually with recommended course of action) to Supervisor (eg. project upgrade will exceed budget allocated - proposed ways or alternatives to keep within budget)</i>
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Example 2

#1 regular & recurring

<p>List the project and the role of the incumbent in this activity.</p>	<p><i>Awards ceremony - incumbent works with academic coordinator and provides administrative support</i></p>
<p>What are the organizational and/or project management skills needed to bring together and integrate this activity?</p>	<ul style="list-style-type: none"> - <i>incumbent is assigned an aspect of the ceremony and is responsible for carrying out that task</i> - <i>determines the banquet facilities to be used, menu, invitations, seating arrangements, decorations, awards ceremony, certificates, presenters, etc</i>
<p>List the types of resources required to complete this task, project or activity.</p>	<ul style="list-style-type: none"> - <i>incumbent is given a specified budget that can be spent and must work within the budget</i> - <i>works with other members of the project team to ensure all aspects have been considered and that others know what he/she has planned</i>
<p>How is/are deadline(s) determined?</p>	<ul style="list-style-type: none"> - <i>project leader would assign task deadlines based on date of ceremony</i>
<p>Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.</p>	<ul style="list-style-type: none"> - <i>incumbent would notify the project leader if adjustments to the project were needed</i> - <i>incumbent would make decisions about how he/she would prioritize own work schedule. For example, the printer has notified the incumbent that there will be a delay in printing the invitations. The incumbent will see if his/her schedule can be adjusted so that other tasks are completed while waiting for the invitations to be printed thereby keeping his/her part of the project on time</i>

Section 5 Guiding/Advising Others

In this section, check the box(es) the best describes the assigned responsibility to guide or advise others in the area of the position's expertise and provide an example. The role of guiding or advising encompasses how the incumbent **directly** helps others in the performance of their work or skill development.

Hints

The term "others" refers to other employees or students.

Guiding and advising goes beyond being helpful and providing ad hoc advise or assistance to others and **must be an assigned responsibility**.

First check the box under "regular & recurring" that describes the normal or regular level of guiding or advising that has been assigned to the position. Then determine if there is an "occasional" level that has also been assigned. You may find that the "regular & recurring" selection is all that is required.

Make sure your selection(s) are also reflected in the "Duties and Responsibilities" section of the PDF.

Examples of Guiding / Advising Others

Example 1

Reg	Occas	Level	Example
<input checked="" type="checkbox"/>		Minimal requirement to guide/advise others. The incumbent may be required to explain procedures to other employees or students.	<i>Though the incumbent may be asked for assistance from other employees, there is no assigned responsibility to help them acquire new skills.</i>
	<input checked="" type="checkbox"/>	There is a need for the incumbent to demonstrate correct processes / procedures to others so that they can complete specific tasks.	<i>In the absence of the Supervisor, the incumbent is available to assist other staff in the department.</i>
		The incumbent recommends a course of action or make decisions so that others can perform their day-to-day activities.	
		The incumbent is an active participant and has ongoing involvement in the progress of others with whom he/she has the responsibility to demonstrate correct processes / procedures or provide direction.	
		The incumbent is responsible for allocating tasks to others and recommending a course of action or making necessary decisions to ensure the tasks are completed.	

Example 2

Reg	Occas	Level	Example
		Minimal requirement to guide/advise others. The incumbent may be required to explain procedures to other employees or students.	

		There is a need for the incumbent to demonstrate correct processes / procedures to others so that they can complete specific tasks.	
		The incumbent recommends a course of action or make decisions so that others can perform their day-to-day activities.	
<input checked="" type="checkbox"/>		The incumbent is an active participant and has ongoing involvement in the progress of others with whom he/she has the responsibility to demonstrate correct processes / procedures or provide direction.	<i>The incumbent is responsible for assessing whether students have successfully grasped the development of skills as it pertains to the lab environment. Evaluation is based on pre-established criteria. The incumbent provides feedback into the student evaluation process and, with Faculty, helps develop remedial work, if required.</i>
		The incumbent is responsible for allocating tasks to others and recommending a course of action or making necessary decisions to ensure the tasks are completed.	

Section 6 Independence of Action

Independence of action looks at the **assigned** responsibility of the position to work independently and the types of decisions that the position is required to make, either on its own or with assistance or input from others.

Hints

Key elements you should describe are:

- the type of decisions that the position makes
- what aspect of these decisions or other tasks are decided by the position on its own or what is decided by, or in consultation with, someone else, such as a co-worker or supervisor
- the rules, procedures, past practice and guidelines that are available to provide guidance and direction
- how the position's work is reviewed and the frequency. For example is work reviewed daily or while in progress and is this done daily, weekly or upon completion of the task or assignment

When describing how work is reviewed, consideration should be given to the "checks and balances" that are in place to verify work. These "checks and balances" do not necessarily involve the Supervisor and can include activities such as feedback from other staff or clients, built-in computerized error routines, etc.

Examples of Independence of Action

Example 1

What are the instructions that are typically required or provided at the beginning of a work assignment?	
Regular and Recurring	Occasional (if none, please strike out this section)
<i>Day to day activity/work is performed independently following established guidelines and past practices.</i>	<i>Verbal or written instructions with suggested work methods and timeframes are provided for new or special projects.</i>

What rules, procedures, past practices or guidelines are available to guide the incumbent?
Regular and Recurring
<ul style="list-style-type: none"> - <i>Ministry issued guidelines</i> - <i>departmental policies and procedures</i> - <i>past practices</i> - <i>operational/procedure manuals</i>

How is work reviewed or verified (eg. feedback from others, work processes, Supervisor)?	
Regular and Recurring	Occasional
<ul style="list-style-type: none"> - <i>day-to-day work is check by review (either by the incumbent or the individual who initiated the request)</i> - <i>much of the computer work is verified by the computer system that is being used</i> 	<ul style="list-style-type: none"> - <i>periodic checks for accuracy and completeness of tasks are conducted by the Supervisor</i>

Describe the type of decisions the incumbent will make in consultation with someone else other than the Supervisor.
Regular and Recurring
<ul style="list-style-type: none"> - <i>incumbent works with minimum of supervision and makes decisions within the scope of the position's expertise</i> - <i>will contact others to gather more information to determine if decision can be made</i>

Describe the type of decisions that would be decided in consultation with the Supervisor.

Regular and Recurring

- *changes to established procedures*
- *difficulties meeting deadlines or setting work priorities*
- *issues requiring a decision that are beyond the scope fo the position*

Describe the type of decisions that would be decided by the incumbent.

Regular and Recurring

- *determine:*
 - *who a request for service should be directed to*
 - *whether the request needs immediate attention (Health and Safety concern) or should be placed in the "work order" queue*
 - *if a request for service has been delayed - should its priority change or be re-scheduled to a later date*

Example 2

What are the instructions that are typically required or provided at the beginning of a work assignment?

Regular and Recurring

Usually follows set procedures and daily routine / time table. Incumbent consults with Supervisor if further instructions are needed to complete any new or unfamiliar tasks.

What rules, procedures, past practices or guidelines are available to guide the incumbent?

Regular and Recurring

Incumbent works on a timed schedule for mail delivery and shuttle services. Procedures developed by the Finance department are followed for the receiving and delivery of goods. Past practices are followed as a guideline during typical work assignments. Other documents, such as college / campus layout, are available but are usually only referred to while the incumbent is becoming familiar with the routine.

How is work reviewed or verified (eg. feedback from others, work processes, Supervisor)?

Regular and Recurring

*Work is reviewed during ongoing discussions with the Supervisor. Users of the mail and shuttle service also provide a check (eg. mail delivered to the wrong department or package not picked up or delivered in time.)
Finance - captures any errors where the appropriate accounting procedures have not been followed.*

Describe the type of decisions the incumbent will make in consultation with someone else other than the Supervisor.

Regular and Recurring

- *equipment failures - whether require a minor adjustment or a service call is required*
- *whether a different courier service should be used to handle an "urgent request"*

Describe the type of decisions that would be decided in consultation with the Supervisor.

Regular and Recurring

- *difficulties meeting deadlines or setting work priorities*
- *difficulties implementing a new procedure or other staff complaints about the process*
- *requests to make significant changes to the delivery schedule*

Describe the type of decisions that would be decided by the incumbent.

Regular and Recurring

- *can a small change to the delivery schedule be accommodated or will it impact the entire schedule*
- *whether the urgent request for pick-up needs immediate attention*
- *if traffic is slow, should the route be adjusted in order to make up time*

Section 7 **Service Delivery**

This section looks at the required manner in which the position delivers service to its customers.

Service delivery refers to more than just the normal anticipation of what customers want/need and supplying it efficiently.

Hints

"Customer" refers to a person or groups of people and can be internal or external to the College.

Describe how the request for service is received (eg. from the client or project leader), and the extent the position is required to design or customize the service it delivers.

In the table provided, list the key service(s) or customer(s) - how the request is received, how is this request for service is carried out and how frequently does it occur.

Examples of Service Delivery

Example 1

Information on the service		Customer	Frequency (D,W,M,I)*
How is it received?	How is it carried out?		
<ul style="list-style-type: none"> - Clients call the Help Desk directly; many times the client only knows that the computer or software does not run or work 	<ul style="list-style-type: none"> - calls are handled by first available person and are logged into database - incumbent must ask relevant questions to determine the nature of the problem and whether it can be corrected by him/her or forwarded to specialist to resolve - procedures manuals are available to provide assistance 	<ul style="list-style-type: none"> - all staff at the College who use a computer 	D
<ul style="list-style-type: none"> - Authorized requests from the Computer Operations section to set up computer accounts 	<ul style="list-style-type: none"> - Computer Operations section provides all relevant information and level of security assigned; account is set up based on these specifications 	<ul style="list-style-type: none"> - staff and students who need access to mainframe computing resources 	W

Example 2

Information on the service		Customer	Frequency (D,W,M,I)*
How is it received?	How is it carried out?		
<ul style="list-style-type: none"> - front-line contact person; therefore all inquiries are initially handled by the incumbent 	<ul style="list-style-type: none"> - the majority of the service requests are straight forward with an established process on how to proceed (eg. how do I withdraw from a course); at other times the incumbent asks questions of the client to ensure a full understanding of a problem, issue or question 	<ul style="list-style-type: none"> - students, public, faculty 	D

Section 8 Communication

A table has been provided listing various communication skills and methods that may be required by a position. For each skill that is needed, provide an example(s), the audience and frequency.

Hints

Include both verbal and written skills.

Consider the level of communication and whether the method of communicating is formal or informal. For example, written proposals could be seen as formal versus an informal interoffice memo or email.

Think about whether the position initiates the communication or modifies others' work.

Consider communication needed between co-workers, clients, etc. but do not include communication between the position and Supervisor.

"Explanation and interpretation of information or ideas" refers to the fact that it is information or data which needs to be explained or clarified. The position would exchange basic technical or administrative information as the normal course of the job and may be required to deal with minor conflicts or complaints. This would also include exchanges of a complex technical nature where the audience has similar technical skill or knowledge.

"Imparting technical information and advice" refers to the need to explain matters by interpreting policy or theory in such a way that it is fully understood by others. The position would need to consider the communication skill/level of the audience and be sensitive to their abilities or limitations. If the exchange is of a technical nature, then the audience would not be fully conversant or knowledgeable about the subject matter.

"Obtaining cooperation or consent" refers to the high level communication and interpersonal skills needed to move others' point of view and gain their commitment to shared goals. The position interacts with individuals, who may or may not share the same view, in order to reach a preferred outcome.

"Negotiating" also refers to the high level communication and interpersonal skills that are needed to reach agreement on complex issues where outcomes could be contentious. The position has the assigned authority to interact with individuals, who have divergent

views or opposing objectives, in order to reach an agreement or compromise that is binding on the College.

Communication used to make arrangements that are relatively straightforward, such as "negotiating" a meeting date would typically be considered as an exchange of routine information.

Examples of Communications

Example 1

Communication Skill/Method	Example	Audience	Frequency (D,W,M,I)*
Exchanging routine information, extending common courtesy	- <i>discussion regarding status of work orders; planned activities</i>	- <i>co-workers</i>	<i>D</i>
Explanation and interpretation of information or ideas	- <i>explaining the work that is required</i> - <i>resolve complaints about whether the work order has been successfully completed (eg. issue has been resolved to the extent incumbent has the authority)</i>	- <i>staff in the College</i>	<i>D</i>
Imparting technical information and advice			
Instructing or training			
Obtaining cooperation or consent			
Negotiating			

Example 2

Communication Skill/Method	Example	Audience	Frequency (D,W,M,I)*
Exchanging routine information, extending common courtesy	- <i>collection of late fee fines</i>	- <i>students, staff, alumni</i>	<i>D</i>
Explanation and interpretation of information or ideas	- <i>answers reference questions such as how to look for specific information, recruiting peer tutors</i>	- <i>students, alumni</i>	<i>D</i>
Imparting technical information and advice	- <i>demonstrates the use and application of LRC equipment, software and materials</i>	- <i>student, staff, alumni</i>	<i>W</i>

Instructing or training	- <i>designs and conducts workshops on how to use research tools, software and databases</i>	- <i>students, staff, alumni, community</i>	<i>I</i>
Obtaining cooperation or consent			
Negotiating			

Example 3

Communication Skill/Method	Example	Audience	Frequency (D,W,M,I)*
Exchanging routine information, extending common courtesy			
Explanation and interpretation of information or ideas	- <i>explaining the services provided by the Co-op office and Advisors</i>	- <i>potential and current students</i> - <i>potential and current employers</i>	<i>D</i>
Imparting technical information and advice			
Instructing or training	- <i>designs and conducts workshops on interviewing skills, resume writing, etc</i>	- <i>students</i>	<i>M</i>
Obtaining cooperation or consent	- <i>resolving potential conflicts (such as job performance issues) between a co-op student and employer that is satisfactory to all involved</i>	- <i>students, employers</i>	<i>M</i>
Negotiating			

Section 9

Physical Effort

This section captures the physical activity that is required, frequency, duration and the ability to reduce strain by changing positions. A table has been provided to capture this information. There is also a separate table to capture information about lifting, if it is a requirement of the job.

Hints

Physical activities include:

- sitting, standing, walking, climbing, crouching, lifting, carrying objects, pulling, pushing

Do not include stiffness and strain from poor posture or work habits.

Include any physical strain associated with travel, along with the duration and whether there is the ability to reduce strain from prolonged sitting.

Examples of Physical Effort

Example 1

Physical Activity	Frequency (D,W,M,I)*	Duration			Ability to reduce strain		
		<1 hr	1-2 hr	> 2 hr	Yes	No	N/A
<i>sitting</i>	<i>D</i>			✓	✓		
<i>lifting/carrying</i>	<i>M</i>	✓			✓		

If lifting is required, please indicate the weights below and provide examples

- Light (up to 5 kg or 11 lbs) *boxes of paper*
- Medium (between 5-20 kg or 11-44 lbs)
- Heavy (over 20 kg or 44 lbs)

Example 2

Physical Activity	Frequency (D,W,M,I)*	Duration			Ability to reduce strain		
		<1 hr	1-2 hr	> 2 hr	Yes	No	N/A
<i>bending</i>	<i>D</i>	✓			✓		
<i>lifting</i>	<i>D</i>	✓			✓		
<i>standing, walking</i>	<i>D</i>			✓	✓		

If lifting is required, please indicate the weights below and provide examples

- Light (up to 5 kg or 11 lbs)
- Medium (between 5-20 kg or 11-44 lbs) *children, furniture, child's toys, equipment*
- Heavy (over 20 kg or 44 lbs)

Section 10 Audio Visual Effort

Audio or visual effort looks at two elements:

1. the degree of attention or focus required for:
 - periods of short, repetitious tasks where listening or visual focus is needed
 - periods where task priorities and/or deadlines change and the additional focus that may be required to adjust activities and concentration
2. activities in which the position has little or no control that make focus difficult. This includes the need to switch attention between tasks.

In the table provided in the PDF, record up to 3 examples of activities that requires a **higher than usual** level of focus or concentration, the frequency and the average duration of the task.

Hints

Assess how disruptions or interruptions impact on focus or concentration. For example, can concentration be maintained or is there a need to refocus or change thought processes in order to complete the task?

It is important to consider the level of concentration that the task requires and not the incumbent's (in)ability.

If the position's primary function is to tend to customer requests then customer requests are not disruptions or interruptions unless the position has other tasks assigned that must be completed while also tending to these requests.

"Concentration" means undivided attention to the task at hand.

It is recognized that a certain level of focus or concentration is needed for most activities, therefore only record activities or tasks where a higher than usual level of focus or concentration is required.

Examples of Audio
Visual Effort

Example 1

Activity #1	Frequency (D,W,M,I)*	Average Duration		
		< 30 min	Up to 2 hrs	> 2 hrs
<i>enrol or change an employee's or retiree's benefit coverage</i>	<i>D</i>		<i>30-45 min</i>	

Can concentration or focus be maintained throughout the duration of the activity? If not, why?

- Usually
No

Activity #2	Frequency (D,W,M,I)*	Average Duration		
		< 30 min	Up to 2 hrs	> 2 hrs
<i>balance, reconcile and remit monthly billing</i>	<i>M</i>		<i>60-90 min</i>	

Can concentration or focus be maintained throughout the duration of the activity? If not, why?

- Usually
 No *telephone inquiries, "drop-in" visits from staff about benefit coverage, questions about why a benefit isn't covered*

Example 2

Activity #1	Frequency (D,W,M,I)*	Average Duration		
		< 30 min	Up to 2 hrs	> 2 hrs
<i>listening and trying to resolve a client's technical problem</i>	<i>D</i>	<input checked="" type="checkbox"/>		

Can concentration or focus be maintained throughout the duration of the activity? If not, why?

- Usually
No

Section 11 Working Environment

In the table provided in the PDF, check **all** applicable box(es) that describe the work environment of the position. Provide an example of the condition and indicate the frequency.

Hints

When providing examples for "travel" include reason for travel and the average duration (length of time) or distance.

The actual mode of transportation is not important. The travel component of this factor refers to the "undesirable" aspect of having to leave the work site and travel somewhere else to complete work assignments.

Examples of Working Environment

Example 1

Working Condition	Example	Frequency (D, W, M, I)*
<input checked="" type="checkbox"/> acceptable working conditions (minimal exposure to the conditions listed below)	standard office environment	D
<input type="checkbox"/> accessing crawl spaces/confined spaces		
<input type="checkbox"/> dealing with abusive people		
<input type="checkbox"/> dealing with abusive people who pose a threat of physical harm		
<input type="checkbox"/> difficult weather conditions		
<input type="checkbox"/> exposure to extreme weather conditions		
<input type="checkbox"/> exposure to very high or low temperatures (e.g. freezers)		
<input type="checkbox"/> handling hazardous substances		
<input type="checkbox"/> smelly, dirty or noisy environments		
<input checked="" type="checkbox"/> travel	incumbent drives between 30 - 80 km each day of the 2 days/wk that is used for client visits	W
<input type="checkbox"/> working in isolated or crowded situations		
<input type="checkbox"/> other (explain)		

Example 2

Working Condition	Example	Frequency (D, W, M, I)*
<input type="checkbox"/> acceptable working conditions (minimal exposure to the conditions listed below)		
<input type="checkbox"/> accessing crawl spaces/confined spaces		

<input type="checkbox"/>	dealing with abusive people		
<input type="checkbox"/>	dealing with abusive people who pose a threat of physical harm		
<input type="checkbox"/>	difficult weather conditions		
<input type="checkbox"/>	exposure to extreme weather conditions		
<input checked="" type="checkbox"/>	exposure to very high or low temperatures (e.g. freezers)	limited exposure if separate heating/cooling fans fail to operate	I
<input type="checkbox"/>	handling hazardous substances		
<input type="checkbox"/>	smelly, dirty or noisy environments		
<input type="checkbox"/>	travel		
<input checked="" type="checkbox"/>	working in isolated or crowded situations	parking booth is a distance away from the main campus - incumbent works alone	D
<input type="checkbox"/>	other (explain)		

Glossary of Action Words¹

ACCOMPLISH - to bring about by effort; to bring to completion; to succeed in reaching

ACCOUNTABLE - responsible

ACHIEVE - to carry out successfully; to attain a desired end or aim

ACKNOWLEDGE - to recognize the rights, authority, or status of; to disclose knowledge of or agreement with; to take notice of; to recognize as genuine or valid

ACQUIRE - to get as one's own; to come into possession or control of often by unspecified means; to come to have as a new or added characteristic, trait, or ability

ADJUST - to bring to a more satisfactory state; to make correspondent or conformable; to bring the parts of to a true or more effective relative position; to reduce to a system; to adapt or conform oneself (as to new conditions)

ADMINISTER - to manage or supervise the execution, use, or conduct of; to mete out (dispense)

ADVISE - to give advice to (counsel); to give information or notice to (inform)

ANALYZE - to study or determine the nature and relationship of the parts of; to subject to scientific or grammatical analysis

ANSWER - something spoken or written in reply to a question; something done in response or reaction; to be or make oneself responsible or accountable; a solution of a problem

ANTICIPATE - to give advance thought, discussion, or treatment to; to meet (an obligation) before a due date; to foresee and deal with in advance; to look forward to as certain

APPRAISE - to set a value on; to evaluate the worth, significance or status of

APPROVE - to accept as satisfactory; to give formal or official sanction to

ARRANGE - to put into a proper order or into a correct or suitable sequence, relationship, or adjustment; to make preparations for

ASCERTAIN - to make certain, exact or precise; to find out or learn with certainty

¹Merriam-Webster Collegiate, 11th edition.

ASSESS - to determine the rate or amount of; to determine the importance, size, or value of

ASSIGN - to appoint to a post or duty; to appoint as a duty or task

ASSIST - to give support or aid; an act of assistance

ASSUME - to take upon oneself; to take as granted or true; to take over as one's own

AUTHORIZE - to establish by or as if by authority; empower

BALANCE - a means of judging or deciding; an aesthetically pleasing integration of elements; to compute the difference between debits and credits of (an account)

BUDGET - a statement of the financial position of an administration for a definite period of time based on estimates of expenditures during the period and proposals for financing them; to allocate funds for use in a budget; a plan for the coordination of resources and expenditures; the amount of money that is available for, required for, or assigned to a particular purpose

CHECK - to verify; to compare with a source; examine

CODE - a system of principles or rules; a system of signals, or symbols for communication

COLLATE - to compare critically; to collect, compare carefully in order to verify, and often to integrate or arrange in proper order; to verify the proper order; to assemble in proper order

COMMUNICATE - to convey knowledge or information about; to transmit information, thought or feeling so that it is satisfactorily received

COMPARE - to examine the character or qualities of especially in order to discover resemblances or differences

COMPILE - to collect and edit into a volume; to compose out of materials from other documents

COMPLETE - having all necessary parts, elements or steps; brought to an end (concluded)

COMPLY - to conform or adapt one's actions to another's wishes, to a rule, or to necessity

COMPOSE - to form by putting together; to create by mental or artistic labour; to arrange in proper or orderly form

COMPREHENSIVE - covering completely or broadly

COMPUTE - to determine especially by mathematical means; to determine or calculate by means of a computer

CONSIDER - to think about carefully; to think of especially with regard to taking some action; to take into account

CONSTRUCT - to make or form by combining or arranging parts or elements; to set in logical order

CONSULT - to have regard to; to ask the advice or opinion of; to serve as a consultant

CONTACT - to get in communication with

CONTROL - to check, test, or verify by evidence or experiments; to exercise restraining or directing influence over; to have power over; an act or instance of controlling; power or authority to guide or manage

CONVINCE - to persuade; to cause others to believe something, using evidence or argument

COORDINATE - to put in the same order or rank; to bring into a common action, movement or condition

COPY - an imitation, transcript or reproduction of an original work (such as a letter, a painting); one of a series of especially mechanical reproductions of an original impression

CORRECT - to make or set right; to alter or adjust so as to bring to some standard or required condition; to point out usually for amendment errors or faults of; conforming to an approved or conventional standard

CORRESPOND - to communicate with a person by exchange of letters; to compare closely

CREATE - to bring into existence; to produce or bring about by course of action or behaviour; to produce through imaginative skill

DECIDE - to make a final choice or judgement about; to select a course of action; to bring to a definitive end; to make a choice or judgement

DEFINE - to determine or identify the essential meaning of; to fix or mark the limits of; to make distinct clear, or detailed especially in outline

DELEGATE - to entrust to another (one's authority); to assign responsibility or authority; to appoint as one representative; a person acting for another

DELETE - to eliminate especially by blotting out, cutting out, or erasing

DEMONSTRATE - to show clearly; to prove or make clear by reasoning or evidence; to illustrate and explain especially with many examples

DESCRIBE - to represent or give an account in words

DETERMINE - to settle or decide by choice of alternatives or possibilities; to find out or come to a decision about by investigation, reasoning, or calculation

DEVELOP - to work out the possibilities of; to set forth or make clear by degrees or in detail; to make active or promote the growth of

DIRECT - to regulate the activities or course of; to carry out the organizing, energizing, and supervising of; to show or point out the way for; to point out, prescribe, or determine a course or procedure

DISCUSS - to investigate by reasoning or argument; to present in detail for examination or consideration; to talk about

DISTRIBUTE - to divide among several or many; to give out or deliver especially to members of a group

DRAFT - to draw the preliminary sketch, version, or plan of

EDIT - to prepare (as literary material) for publication or public presentation; to alter, adapt or refine especially to bring about conformity to a standard or to suit a particular purpose; to direct the publication of

EMPOWER - to give official authority or legal power to

ENSURE - to make sure, certain or safe

ESTABLISH - to make firm or stable; to institute (as a law) permanently by enactment or agreement; to put on a firm basis; to gain full recognition or acceptance of

ESTIMATE - appraise; to judge tentatively or approximately the value, worth, or significance of; to determine roughly the size, extent, or nature of; a rough or approximate calculation

EVALUATE - to determine or fix the value of; to determine the significance or worth or condition of usually by careful appraisal and study

EXAMINE - to inspect closely; to inquire or inspect carefully

EXCEPTION - a case to which a rule does not apply

EXECUTE - to carry out fully; to do what is provided or required by; to perform what is required to give validity to

EXPEDITE - to execute promptly; to accelerate the process or progress of

EXPLAIN - to make plain or understandable; to give the reason for or cause; to show the logical development or relationship of

EXTRACT - to draw forth (as by research); to select (excerpts) and copy out or cite; to withdraw (as juice or fraction) by physical or chemical process

FACILITATE - to make easier; to help bring about

FILE - to arrange in order for preservation and reference; to place among official records as prescribed by law; a device (as a folder, case or cabinet) by means of which papers are kept in order; a collection of papers or publications usually arranged or classified; a collection of related data records (as for a computer)

FINALIZE - to put in final or finished form; to give final approval to

FOLLOW-UP - to follow with something similar, related or supplementary; to pursue in an effort to take further action; to take appropriate action

FORECAST - to calculate or predict (some future event or condition) usually as a result of rational study and analysis of available pertinent data; to indicate as likely to occur

FOSTER - to promote the growth or development of

FUNCTION - professional or official position; the action for which a person or thing is specially fitted or used or for which a thing exists; an official or formal ceremony or social gathering

GATHER - to bring together; to collect; to accumulate and place in readiness; to reach a conclusion often intuitively from hints or through inferences; to gain by gradual increase

GENERAL - applicable to or characteristic of the majority of individuals involved; relating to determined by, or concerned with main elements rather than limited details; something (as a concept, principle or statement) that involves or is applicable to the whole

GENERATE - to bring into existence; to be the cause of (a situation, action, or state of mind)

GOVERN - to control and direct the making and administration of policy; to control the speed of (as a machine) especially by automatic means; to control, direct, or strongly influence the actions and conduct

GUIDE - to direct, supervise, or influence usually to a particular end; direct in a way or course

IMPLEMENT - to carry out, accomplish; to give practical effect to and ensure actual fulfilment of concrete measures

INFORM - to communicate knowledge to; to give information

INITIATE - to cause or facilitate the beginning of; to instruct in the rudiments or principles of something

INSPECT - to examine officially; to view closely in critical appraisal

INSTALL - to establish in an indicated place, condition, or status; to set up for use or service

INTERPRET - to explain or tell the meaning of: present in understandable terms

INVENTORY - an itemized list of current assets; the quantity of goods or materials on hand; the act or process of taking an inventory

INVESTIGATE - to observe or study by close examination and systematic inquiry; to conduct an official inquiry

ISSUE - to be a consequence or final outcome; a final outcome that usually constitutes a solution (as of a problem) or resolution (as of a difficulty)

ITEMIZE - to set down in detail or by particulars

LIST - a simple series of words or numerals (as the names of persons or objects); enumerate; to make a list of

LOCATE - to determine or indicate the place, site or limits of; to set or establish in a particular spot; to seek out and determine the location of

MAINTAIN - to keep in existing state (as of repair, efficiency or validity)

MANAGE - to handle or direct with a degree of skill or address; to exercise executive, administrative and supervisory direction of; to succeed in accomplishing; to achieve one's purpose

MANIPULATE - to treat or operate with the hands or by mechanical means especially in a skilful manner; to manage or utilize skilfully

MODIFY - to make less extreme; to limit or restrict the meaning of especially in a grammatical construction; to make minor changes in; to make basic or fundamental changes to give a new orientation to or to serve a new end

MONITOR - to watch, observe, or check especially for a special purpose; to keep track of, regulate or control the operation of (as a machine or process)

NOTIFY - to point out; to give notice of or report the occurrence of; to give formal notice to

OBSERVE - to watch carefully especially with attention to details or behaviour for the purpose of arriving at a judgement; to come to realize or know especially through consideration of noted facts; to conform one's action or practice to (as law, rite or condition); comply with

OPERATE - to perform a function; bring about, effect

OPPOSE - to place opposite or against something; to offer resistance to

ORGANIZE - to arrange or form into coherent unity or functioning whole; to arrange by systematic planning and united effort; to arrange elements into a whole of interdependent parts

OUTLINE - a summary of a written work; a preliminary account of a project; to indicate the principal features or different parts of

OVERSEE - survey, watch; inspect, examine; supervise

PARTICIPATE - to take part; to have a part or share in something

PERFORM - carry out, do

PERSUADE - to move by argument, entreaty or expostulation to a belief, position or course of action; to plead with

PLAN - a method for achieving an end; an orderly arrangement of parts of an overall design or objective; to design or project the realization or achievement of; to have in mind

POST - to publish, announce, advertise by or as if by use of a placard; to transfer or carry from a book of original entry to a ledger; to publish (as a message) in an online forum (as an electronic bulletin board)

PRACTICE - to perform or work at repeatedly so as to become proficient; the usual way of doing something

PREPARE - to make ready beforehand for some purpose, use or activity; to work out the details of; to put together

PRESCRIBE - to lay down as a guide, direction or rule of action; to specify with authority; to designate or order the use of as a remedy

PROCESS - progress, advance; a series of actions or operations conducting to an end; treated or made by a special process especially when involving synthesis or artificial modification; to subject to or handle through an established usually routine set of procedures; to integrate sensory information received so that an action or response is generated; to subject to examination or analysis

PROCURE - to bring about; to get possession of; obtain by particular care and effort

PRODUCE - to give being, form or shape to; to compose, create, or bring out by intellectual or physical effort

PROPOSE - to form or put forward a plan or intention; to set before someone and especially oneself as an aim or intent; to set forth for acceptance or rejection

PURCHASE - to obtain by paying money or its equivalent

RECOMMEND - to endorse as fit, worthy, or competent

RECONCILE - to check (a financial account) against another for accuracy; to account for; to make consistent or congruous

RECORD - to set down in writing; an official document that records the acts of a public body or officer; a collection of related items of information (as in a database) treated as a unit

REFER - to direct attention usually by clear and specific mention; to send or direct for treatment, aid, information, or decision; to make reference to; to have relation or connection

REMIT - to send (money) to a person or place especially in payment of a demand; to submit or refer for consideration, judgement, decision or action

REPORT - to give an account of; an usually detailed account or statement; to give a formal or official account or statement

REQUISITION - the act of formally requiring or calling upon someone to perform an action; the act of requiring something to be furnished

RESEARCH - careful or diligent search; studious inquiry or examination; the collecting of information about a particular subject

RESOLVE - to reduce by analysis; to deal with successfully; to find an answer to; to make clear or understandable

RETRIEVE - to get and bring back

REVIEW - a critical evaluation (as of a book or play); renewed study of material previously studied; to examine or study again; to go over or examine critically or deliberately

REVISE - to look over again in order to correct or improve; to make a new, amended, improved, or up-to-date version of

SCHEDULE - a written or printed list, catalogue or inventory; a procedural plan that indicates the time and sequence of each operation; to appoint, assign, or designate for a fixed time

SEARCH - to look into, over carefully, thoroughly in an effort to find, discover something; to uncover, find, or come to know by inquiry or scrutiny

SENSITIVE - concerned with highly classified government information or involving discretionary authority over important policy matters; calling for tact, care or caution in treatment

SERVE - to prove adequate or satisfactory; to help persons to food; to wait on customers; to treat or act towards in a specified way

SORT - to put in a certain place or rank, according to kind, class or nature; to arrange according to characteristics; to examine in order to clarify

SPECIFY - to name or state explicitly or in detail

SUBMIT - to present or propose to another for review, consideration, or decision; to put forward as an opinion or contention; to defer to or consent to abide by the opinion or authority of another

SUPERVISION - the action, process, or occupation of supervising; a critical watching and directing (as of activities or a course of action)

SUPPLY - to make available for use; the quantity or amount (as of a commodity) needed or available

SUPPORT - to keep (something) going; to hold up or serve as a foundation or prop for; to argue or vote for

SURVEY - to examine as to condition, situation, or value; to view or consider comprehensively; inspect

TABULATE - to put into tabular form; to count, record, or list systematically

TRANSCRIBE - to make a written copy of; to paraphrase or summarize in writing

TRANSLATE - to turn into one's own language or another language; to express in more comprehensible terms

TRANSPOSE - to transfer from one place or period to another; to change the relative place or normal order of; to change in form or nature

UPDATE - an up-to-date version, account, or report; current information for updating something; to bring up to date

VERIFY - to establish the truth, accuracy, or reality of

Sample Position Description Form (PDF)

College:

Incumbent's Name:

Position Title:

Payband:

Position Code/Number (if applicable):

Supervisor's Name and Title:

Completed by:

Date:

Signatures:

Incumbent:
(Indicates the incumbent has read and understood the PDF)

Date:

Supervisor:

Date:

Supervisor's Supervisor:

Date:

Instructions for Completing the PDF

1. Read the form carefully before completing any of the sections.
2. Answer each section as completely as you can based on the typical activities or requirements of the position and not on exceptional or rare requirements.
3. If you have any questions, refer to the document entitled "A Guide on How to Write Support Staff Position Description Forms" or contact your Human Resources representation for clarification.
4. Ensure the PDF is legible.
5. Responses should be **straightforward and concise using simple factual statements**.

Position Summary

Provide a concise description of the overall purpose of the position.

Duties and Responsibilities

Indicate as clearly as possible the significant duties and responsibilities associated with the position. Indicate the approximate percentage of time for each duty. Describe duties rather than detailed work routines.

	Approximate % of time annually*

* To help you estimate approximate percentages:

½ hour a day is 7%	1 hour a day is 14%	1 hour a week is 3%
½ day a week is 10%	½ day a month is 2%	1 day a month is 4%
1 week a year is 2%		

1. Education

A. Check the box that best describes the **minimum** level of **formal** education that is required for the position and specify the field(s) of study. Do not include on-the-job training in this information.

- | | | |
|--|--|--|
| <input type="checkbox"/> Up to High School or equivalent | <input type="checkbox"/> 1 year certificate or equivalent | <input type="checkbox"/> 2 year diploma or equivalent |
| <input type="checkbox"/> Trade certification or equivalent | <input type="checkbox"/> 3 year diploma / degree or equivalent | <input type="checkbox"/> 3 year diploma / degree plus professional certification or equivalent |
| <input type="checkbox"/> 4 year degree or equivalent | <input type="checkbox"/> 4 year degree plus professional certification or equivalent | <input type="checkbox"/> Post graduate degree (e.g. Masters) or equivalent |
| <input type="checkbox"/> Doctoral degree or equivalent | | |

Field(s) of Study:

B. Check the box that best describes the requirement for specific course(s), certification, qualification, formal training or accreditation in addition to and not part of the education level noted above and in the space provided specify the additional requirement(s). Include only the requirement that would typically be included in the job posting and would be acquired prior to the commencement of the position. Do not include courses that are needed to maintain a professional designation.

- No additional requirements
- Additional requirements obtained by course(s) of a total of 100 hours or less
- Additional requirements obtained by course(s) of a total between 101 and 520 hours
- Additional requirements obtained by course(s) of a total of more than 520 hours

2. Experience

Experience refers to the minimum time required in prior position(s) to understand how to apply the techniques, methods and practices necessary to perform this job. This experience may be less than experience possessed by the incumbent, as it refers only to the minimum level required on the first day of work.

Check the box that best captures the typical number of year of experience, in addition to the necessary education level, required to perform the responsibilities of the position and, in the space provided, describe the type of experience.

Less than one (1) year

Minimum of one (1) year

Minimum of two (2) years

Minimum of three (3) years

Minimum of five (5) years

Minimum of eight (8) years

3. Analysis and Problem Solving

This section relates to the application of analysis and judgement within the scope of the position.

The following charts help to define the level of complexity involved in the analysis or identification of situations, information or problems, the steps taken to develop options, solutions or other actions and the judgement required to do so.

Please provide up to three (3) examples of analysis and problem solving that are regular and recurring and, if present in the position, up to two (2) examples that occur occasionally:

	#1 regular & recurring
Key issue or problem encountered.	
How is it identified?	
Is further investigation required to define the situation and/or problem? If so, describe.	
Explain the analysis used to determine a solution(s) for the situation and/or problem.	
What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).	

3. Analysis and Problem Solving

#2 regular & recurring

Key issue or problem encountered

How is it identified?

Is further investigation required to define the situation and/or problem? If so, describe.

Explain the analysis used to determine a solution(s) for the situation and/or problem.

What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).

#3 regular & recurring

Key issue or problem encountered

How is it identified?

Is further investigation required to define the situation and/or problem? If so, describe.

Explain the analysis used to determine a solution(s) for the situation and/or problem.

What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).

3. Analysis and Problem Solving

#1 occasional (if none, please strike out this section)

Key issue or problem encountered

How is it identified?

Is further investigation required to define the situation and/or problem? If so, describe.

Explain the analysis used to determine a solution(s) for the situation and/or problem.

What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).

#2 occasional (if none, please strike out this section)

Key issue or problem encountered

How is it identified?

Is further investigation required to define the situation and/or problem? If so, describe.

Explain the analysis used to determine a solution(s) for the situation and/or problem.

What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).

4. Planning/Coordinating

Planning is a proactive activity as the incumbent must develop in advance a method of acting or proceeding, while coordinating can be more reactive in nature.

Using the following charts, provide up to three (3) examples of planning and/or coordinating that are regular and recurring and, if present in the position, up to two (2) examples that occur occasionally:

#1 regular & recurring

List the project and the role of the incumbent in this activity.

What are the organizational and/or project management skills needed to bring together and integrate this activity?

List the types of resources required to complete this task, project or activity.

How is/are deadline(s) determined?

Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.

4. Planning/Coordinating

#2 regular & recurring

List the project and the role of the incumbent in this activity.

What are the organizational and/or project management skills needed to bring together and integrate this activity?

List the types of resources required to complete this task, project or activity.

How is/are deadline(s) determined?

Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.

#3 regular & recurring

List the project and the role of the incumbent in this activity.

What are the organizational and/or project management skills needed to bring together and integrate this activity?

List the types of resources required to complete this task, project or activity.

How is/are deadline(s) determined?

Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.

4. Planning/Coordinating

#1 occasional (if none, please strike out this section)

List the project and the role of the incumbent in this activity.

What are the organizational and/or project management skills needed to bring together and integrate this activity?

List the types of resources required to complete this task, project or activity.

How is/are deadline(s) determined?

Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.

#2 occasional (if none, please strike out this section)

List the project and the role of the incumbent in this activity.

What are the organizational and/or project management skills needed to bring together and integrate this activity?

List the types of resources required to complete this task, project or activity.

How is/are deadline(s) determined?

Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.

5. Guiding/Advising Others

This section describes the **assigned responsibility** of the position to guide or advise others (e.g. other employees, students). Focus on the actions taken (rather than the communication skills) that directly assist others in the performance of their work or skill development.

Though Support Staff cannot formally "supervise" others, there may be a requirement to guide others using the incumbent's job expertise. This is beyond being helpful and providing ad hoc advice. It must be an assigned responsibility and must assist or enable others to be able to complete their own tasks.

Check the box(es) that best describe the level of responsibility assigned to the position and provide an example(s) to support the selection, including the positions that the incumbent guides or advises.

Regular & Recurring	Occasional	Level	Example
<input type="checkbox"/>		Minimal requirement to guide/advise others. The incumbent may be required to explain procedures to other employees or students.	
<input type="checkbox"/>	<input type="checkbox"/>	There is a need for the incumbent to demonstrate correct processes/procedures to others so that they can complete specific tasks.	
<input type="checkbox"/>	<input type="checkbox"/>	The incumbent recommends a course of action or makes decisions so that others can perform their day-to-day activities.	
<input type="checkbox"/>	<input type="checkbox"/>	The incumbent is an active participant and has ongoing involvement in the progress of others with whom he/she has the responsibility to demonstrate correct processes/procedures or provide direction.	
<input type="checkbox"/>	<input type="checkbox"/>	The incumbent is responsible for allocating tasks to others and recommending a course of action or making necessary decisions to ensure the tasks are completed.	

6. Independence of Action

Please illustrate the type of independence or autonomy exercised in the position. Consideration is to be given to the degree of freedom and constraints that define the parameters in which the incumbent works.

What are the instructions that are typically required or provided at the beginning of a work assignment?	
Regular and Recurring	Occasional (if none, please strike out this section)

What rules, procedures, past practices or guidelines are available to guide the incumbent?	
Regular and Recurring	Occasional (if none, please strike out this section)

How is work reviewed or verified (eg. feedback from others, work processes, Supervisor)?	
Regular and Recurring	Occasional (if none, please strike out this section)

6. Independence of Action

Describe the type of decisions the incumbent will make in consultation with someone else other than the Supervisor?	
Regular and Recurring	Occasional (if none, please strike out this section)

Describe the type of decisions that would be decided in consultation with the Supervisor.	
Regular and Recurring	Occasional (if none, please strike out this section)

Describe the type of decisions that would be decided by the incumbent.	
Regular and Recurring	Occasional (if none, please strike out this section)

7. Service Delivery

This section looks at the service relationship that is an assigned requirement of the position. It considers the required manner in which the position delivers service to customers. It is not intended to examine the incumbent's interpersonal relationship with those customers and the normal anticipation of what customers want and then supplying it efficiently. It considers how the request for service is received and the degree to which the position is required to design and fulfil the service requirement. A "customer" is defined in the broadest sense as a person or groups of people and can be internal or external to the College.

In the table below, list the key service(s) and its associated customers. Describe how the request for service is received by the incumbent, how the service is carried out and the frequency.

Information on the service		Customer	Frequency (D, W, M, I)*
How is it received?	How is it carried out?		

* D = Daily W = Weekly M = Monthly I = Infrequently

8. Communication

In the table below indicate the type of communication skills required to deal effectively with others. Be sure to list both verbal (e.g. exchanging information, formal presentations) and written (e.g. initiate memos, reports, proposals) in the section(s) that best describes the method of communication.

Communication Skill/Method	Example	Audience	Frequency (D, W, M ,I)*
Exchanging routine information, extending common courtesy			
Explanation and interpretation of information or ideas			
Imparting technical information and advice			
Instructing or training			
Obtaining cooperation or consent			
Negotiating			

* D = Daily W = Weekly M = Monthly I = Infrequently

9. Physical Effort

In the tables below, describe the type of physical activity that is required on a regular basis. Please indicate the activity as well as the frequency, the average duration of each activity and whether there is the ability to reduce any strain by changing positions or performing another activity. Activities to be considered are sitting, standing, walking, climbing, crouching, lifting and/or carrying light, medium or heavy objects, pushing, pulling, working in an awkward position or maintaining one position for a long period.

Physical Activity	Frequency (D, W, M, I)*	Duration			Ability to reduce strain		
		< 1 hr at a time	1 - 2 hrs at a time	> 2 hrs at a time	Yes	No	N/A

* D = Daily W = Weekly M = Monthly I = Infrequently

If lifting is required, please indicate the weights below and provide examples.

- Light (up to 5 kg or 11 lbs)
- Medium (between 5 to 20 kg or 11 to 44 lbs)
- Heavy (over 20 kg or 44 lbs)

10. Audio Visual Effort

Describe the degree of attention or focus required to perform tasks taking into consideration:

- the audio/visual effort and the focus or concentration needed to perform a task and the duration of the task, including breaks (eg. up to 2 hours at one time including scheduled breaks)
- impact on attention or focus due to changes to deadlines or priorities
- the need for the incumbent to switch attention between tasks (eg. multi-tasking where each task requires focus or concentration)
- whether the level of concentration can be maintained throughout the task or is broken due to the number of disruptions

Provide up to three (3) examples of activities that require a higher than usual need for focus and concentration.

Activity #1	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs

Can concentration or focus be maintained throughout the duration of the activity? If not, why?

Usually

No

Activity #2	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs

Can concentration or focus be maintained throughout the duration of the activity? If not, why?

Usually

No

Activity #3	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs

Can concentration or focus be maintained throughout the duration of the activity? If not, why?

Usually

No

* D = Daily W = Weekly M = Monthly I = Infrequently

11. Working Environment

Please check the appropriate box(es) that best describes the work environment and the corresponding frequency and provide an example of the condition.

Working Condition	Example	Frequency (D, W, M, I)*
<input type="checkbox"/> acceptable working conditions (minimal exposure to the conditions listed below)		
<input type="checkbox"/> accessing crawl spaces/confined spaces		
<input type="checkbox"/> dealing with abusive people		
<input type="checkbox"/> dealing with abusive people who pose a threat of physical harm		
<input type="checkbox"/> difficult weather conditions		
<input type="checkbox"/> exposure to extreme weather conditions		
<input type="checkbox"/> exposure to very high or low temperatures (e.g. freezers)		
<input type="checkbox"/> handling hazardous substances		
<input type="checkbox"/> smelly, dirty or noisy environments		
<input type="checkbox"/> travel		
<input type="checkbox"/> working in isolated or crowded situations		
<input type="checkbox"/> other (explain)		

* D = Daily M = Monthly W = Weekly I = Infrequently