

University of Maine System


Classification Study

POSITION DESCRIPTION QUESTIONNAIRE (PDQ)

INSTRUCTIONS AND GUIDELINES FOR COMPLETING YOUR PDQ

Position Description Questionnaires (PDQs) are being distributed to all employees whose positions are included within the scope of the study. As these PDQs are used to write job classifications, it is extremely important for you to **fill out your questionnaire completely and accurately.**

To make this process easier for you, we recommend you **first read through the entire questionnaire** so that you understand the information we are asking for in each section. Next, complete as much of the questionnaire as you can and then put it down for a day. On the next day, complete the rest of the questionnaire. Finally, just before you turn it in, read it again to make sure you haven't forgotten anything. Be sure to **confirm with your supervisor what is the best work time for you to complete the PDQ.** We have included a checklist on page #2 to assist you with tracking your progress.

1. The information you provide on the following Position Description Questionnaire (PDQ) will be used to develop the new job classification system for the University of Maine System (UMS) and to determine the correct classification for your job. It is very important that you provide accurate, detailed information about your current job duties – regardless of your classification. Accuracy is very important. Providing overstated or understated answers will make it more difficult to complete this process.
2. You may complete your PDQ as an individual, or you may join with other employees who perform the same type of work that you do to complete the PDQ as a group. **Contact your campus HR department for specific details on how to participate through a group process.**
3. The questionnaire must be reviewed and signed by your immediate supervisor and your Department Head. Both your campus HR department and the Fox Lawson Consultants will then each review the questionnaire information to ensure fairness and accuracy. Objectivity is the main consideration when PDQs are reviewed.
4. **Questions about completion of the PDQ can be directed to your campus HR department.** Please spend a majority of your time on the sections indicated by arrows, as these are the most important sections in determining job classifications in the new system. 
5. We suggest that you keep a copy of the final document for your records. The original PDQ must be submitted to your supervisor by **January 5, 2009.** Department Heads must submit final PDQs to their campus HR Department by **January 19, 2009.**

Search "**HECCP Portal**" on the UMS website to find our HECCP site and learn more about the project.

Position Description Questionnaire (PDQ) Overview & Checklist

Following is an overview of the UMS PDQ. Please use the checkboxes next to each section to monitor your progress and ensure completion.

I - Background

- Employee Background: Name, title, email, department, etc.

II - Position Information

1. Position Summary: Written description of your job's primary purpose.
2. Supervision & Organizational Relationships
- a) Supervision Given: Details of your supervisory responsibility, if any.
 - b) Organizational Relationships: Titles of coworkers and subordinates.
 - c) Contacts: Inside and outside the UMS.
3. Major Duties: Significant job duties and their required decisions and frequency.
4. Required Knowledge & Skills: Required knowledge and skills to perform major duties.

III - Education, Experience, and Equipment

1. Education: What education do you have vs. what is the minimum needed to do the job at START LEVEL?
2. Experience: What experience do you have vs. what is the minimum needed to do the job at START LEVEL?
3. Special Requirements
4. Machines, Tools, Software & Equipment: Necessary equipment needed to perform job.
5. Decision Making & Judgments: Short answers regarding decisions you are responsible for making.
6. Creativity & Problem Solving: Short answers regarding problems you are responsible for solving.

IV - Physical Activities and Working Conditions

1. Physical Activities/Requirements.
2. Working Conditions: Physical working conditions.

V - Employee, Supervisor, and Department Head Signatures

- Employee, Supervisor, and Department Head Signatures

For HR Use Only

EmpID _____ PosID _____

PLEASE READ ENTIRE QUESTIONNAIRE BEFORE COMPLETING FORM

Important note: If this PDQ is being completed by a group, then each individual in the group must complete pages 3, 17 and 19 and then return everything in a single packet.

I. EMPLOYEE BACKGROUND: In this section you will provide information regarding your name, current classification title, your immediate supervisor, etc. This will help us make sure we refer to the correct job throughout the study.

Employee Name: _____ **Date Form Completed:** _____

Current Classification Title: _____ **University:** _____

Work Phone: _____ **Campus:** _____

E-mail: _____ **Department:** _____

Immediate Supervisor:

Immediate supervisor reports to:

Name: _____ **Name:** _____

Title: _____ **Title:** _____

Work Phone: _____ **Work Phone:** _____

E-mail: _____ **E-mail:** _____

Position is (check one): Regular full-time Regular part-time

Are you Dual Rated? Yes **or No** **[If unsure, ask your supervisor or HR.] If Yes, what is your second title?** _____

II. POSITION INFORMATION

1. POSITION SUMMARY: This section asks for a short paragraph, one to three sentences, regarding the purpose of your position and/or your primary responsibilities. This summary helps us to quickly understand the essence of your job. Usually it is better to write this after you have completed the remainder of the questionnaire. Briefly describe what you consider to be the major purpose or objective of the job. Simply stated, what are you attempting to accomplish in your position? For example, a position summary for a *Computer Support Technician* might be:

“To operate, maintain and repair computer equipment and to provide technical assistance to users.”

WRITE HERE: (attach additional sheet if necessary)

2. SUPERVISION & ORGANIZATIONAL RELATIONSHIPS – This Is Very Important!



a. Supervision Given. The chart below asks for your specific supervisory responsibilities. If a duty statement applies to you, please check the box under the “Yes” column and then indicate the **# of employees** for whom you are responsible to the right of the statement.

Yes	Duty	# FT & PT Regular Employees	# Student Employees	# Temp Employees
<input type="checkbox"/>	I contribute to the performance reviews of others.			
<input type="checkbox"/>	I evaluate and sign performance reviews of employees.			
<input type="checkbox"/>	I instruct others in methods or procedures needed to carry out their job (how to carry-out their assigned duties).			
<input type="checkbox"/>	I make and schedule work assignments for others.			
<input type="checkbox"/>	I approve time off.			
<input type="checkbox"/>	I approve the work of others.			
<input type="checkbox"/>	I verify the work of others.			
<input type="checkbox"/>	I make hiring recommendations.			
<input type="checkbox"/>	I make hiring decisions.			
<input type="checkbox"/>	I recommend disciplinary actions when necessary.			

b. Organizational Relationships. Complete the organization chart below. This chart will help us to understand your job in relation to others in your department. Please **use titles and not names**. Fill in the applicable position titles. In the box on the right, list titles of those who report to you. Do not list employees supervised by supervisors who report to you.

YOUR CO-WORKERS’ “JOB TITLES”

List the “titles” of your co-workers, that is, those you work in the same department and who also report directly to your supervisor, or a similar supervisor.

“JOB TITLES” OF EMPLOYEES WHO REPORT TO YOU

Based on your responses in Section 2a above, list the “titles” of employees you supervise (including student and temp employees). *Do not list titles of employees supervised by supervisors who report to you.*



3. MAJOR DUTIES – This Is Very Important!

The list of major duties helps us to understand those duties which are the primary reasons why your position exists. For clarification, please refer to the examples provided below.

- **Major Duties:** Those duties that take **at least 5%** of your time. Please provide enough detail so that someone who may not be familiar with your job will have a clear understanding of what it is that you do. For example, do not simply state “prepares reports” or “does installation,” but state “prepares reports such as status reports, staff reports” (or other type of report(s) you may prepare) or “installs electrical circuits.” Also, please **use action verbs such as prepares, calculates, installs, operates, coordinates, etc. to start off each statement** (a list of additional action verbs is available in the Toolbox on the HECCP website (<http://www.maine.edu/system/hr/heccp.php>) Do not use acronyms (e.g., DOL, HECCP) or abbreviations in your description. Examples are shown below. Use additional sheets if needed.
- **Decisions Required:** List the decisions you make to carry out the major duties.
- **Final Authority:** Indicate if you have final authority to make this decision (select ‘Yes’ or ‘No’).
- **Frequency:** Indicate how often you perform each duty – D = daily, W = weekly, M = monthly, Q = quarterly, A = annually, or O = occasionally.
- **Percent of Time:** Indicate how much of your time you spend on each duty. The total of these percentages **should not be more than 100%**. Example: Sally reviews student transcripts 20% of the time; it may mean she spends one day out of five on that task, or that she spends around two hours each day. **These need only be estimates of time spent on each duty so do not spend a great deal of time trying to come up with an exact percentage.** The percentages of **all** duties should approximate 100% **over a one year period of time.**

Conversion table for average amount of time spent performing major duties:

% of Time	Daily	Weekly	Monthly	Quarterly	Annually
5%	.50 Hour	2 Hours	1 Day	3 Days	2.5 Weeks
10%	1 Hour	4 Hours	2 Days	6 Days	5 Weeks
15%	1.2 Hours	6 Hours	3 Days	9 Days	8 Weeks
20%	1.6 Hours	8 Hours	4 Days	12 Days	10 Weeks
25%	2 Hours	10 Hours	5 Days	15 Days	13 Weeks
30%	2.4 Hours	12 Hours	6 Days	18 Days	15.5 Weeks
35%	2.8 Hours	14 Hours	7 Days	21 Days	18 Weeks
40%	3.2 Hours	16 Hours	8 Days	24 Days	21 Weeks
45%	3.6 Hours	18 Hours	9 Days	27 Days	23 Weeks
50%	4 Hours	20 Hours	10 Days	30 Days	26 Weeks

Attach any additional information which may clarify these duties.

EXAMPLE (LIST ACTUAL MAJOR DUTIES BELOW EXAMPLE)

List of Major Duties	Decisions Required	Final Authority?	Frequency DWMQAO	% of Time*
<i>Example: Prepares monthly newsletters by gathering information, writing copy, editing, preparing for publication and overseeing distribution.</i>	<i>Articles to include, editorial changes, graphics, layouts</i>	<i>Yes</i>	<i>M</i>	<i>25%</i>
<i>Example: Performs inventory spot checks and monthly counts of supplies in warehouse.</i>	<i>When to check supplies</i>	<i>No</i>	<i>M</i>	<i>10%</i>

***Just a reminder, do not spend a great deal of time trying to come up with exact percentages. We are looking for close approximations that total 100%.**

List of Major Duties

Decisions Required

Final Authority?
Y = Yes
N = No

Frequency:
D = Daily
W = Weekly
M = Monthly
Q = Quarterly
A = Annually
O = Occasionally

% of Time Spent
(Not to exceed 100%)

1.				
2.				
3.				
4.				
5.				

6.				
7.				
8.				
9.				
10.				

Attach any additional information which may clarify these duties.



4. REQUIRED KNOWLEDGE AND SKILLS – This Is Very Important!

This section helps us to understand the types of knowledge and skill you need to perform your job, and for each knowledge and skill, the *level of proficiency* required at the **start level** (i.e., when first hired). List items that are required, not what you might necessarily know or are able to do after being in the position for a number of years.

- **Knowledge:** refers to concepts and information gained through experience, training and/or education. Can be measured through testing using paper and pencil methods.
- **Skills:** refers to a proficiency which can be demonstrated. Skills are typically manual in nature and/or can be measured through observation.
- **Proficiency:** refers to the level of knowledge or skill required to perform the job at the **start level** (i.e., when first hired). Please indicate: Basic, Intermediate, or Advanced.

The knowledge and skills that you list in the following section must correspond to the Major Duties you listed in Section 3.

For each major duty, list required knowledge & skills.	Major Duty #	Knowledge & Skills	Required Level of Proficiency (Basic, Intermediate, or Advanced)
	<i>Ex. 1</i> <i>Ex. 2</i>	<i>Knowledge of basic journalism principles such as news research and copy writing.</i> <i>Ability to organize systems of inventory.</i>	<i>Intermediate</i> <i>Basic</i>



III. EDUCATION, EXPERIENCE, AND EQUIPMENT – This Is Very Important!

On the previous page we asked about what you needed to know and what skills are required to do your job. In this section we want to understand how you learned it.

1. EDUCATION: What level of education do you have and what is the minimum education needed to satisfactorily perform your job at **start level** (i.e., when first hired)? Select the level that applies to your job:

You Have

- 1. Less than High School Diploma or GED
- 2. High School or GED
- 3. Up to one year of college or specialized training
- 4. Associate degree (A.S., A.A.)
- 5. Bachelor’s degree
- 6. Master’s degree
- 7. Doctorate/Ph. D.

What does the POSITION need? (Minimum Required)

- 1. Less than High School Diploma or GED
- 2. High School or GED
- 3. Up to one year of college or specialized training
- 4. Associate degree (A.S., A.A.)
- 5. Bachelor’s degree

2. EXPERIENCE: What kinds of experience have you acquired to do your job and what are the minimum kinds of experience needed to satisfactorily perform your job at **start level** (i.e., when first hired)?

You Have

Your Time

_____ years

_____ years

_____ years

What does the POSITION need?

Minimum Time Required

_____ years

_____ years

_____ years

What field(s) should training or degree be in?

3. SPECIAL REQUIREMENTS: List any registrations, certifications or licenses that are required for you to hold your position. Be specific and do not abbreviate words or use acronyms.

4. MACHINES, TOOLS AND EQUIPMENT. List any machines, tools, equipment or software **unique to your job** that are used in the course of your work. You do not need to list telephone, fax, printer, copy machine, etc. List the machines, tools, equipment or software that correspond to the Major Duties you listed in Section 3. Indicate the frequency and time spent using each (refer to page 7 for frequency categories and conversion table). Percentages do not need to total 100%.

Duty #	Machines, Tools, Equipment	Frequency / %Time
<i>Ex. #3</i>	<i>Power drill, hammer, ladder, circular saw.</i>	<i>Daily/20%</i>

5. DECISION-MAKING & JUDGMENTS.

a. Describe three types of important decisions and judgments you make regularly and independently in the performance of your duties.

1.

2.

3.

b. For what duties do you make the final decision? Provide examples.

c. Does your position have authority to commit the organization, or any of its units, to a course of action (e.g., spend money, sign a contract, etc.)? Provide examples.

d. Please provide an example of a serious error typical of what could occur in your work and the resulting consequences.

6. PROBLEM SOLVING.

Describe up to three problems that could be encountered in your work and how these problems are solved.

1.

2.

3.

IV: PHYSICAL ACTIVITIES AND WORKING CONDITIONS

1. PHYSICAL ACTIVITIES/REQUIREMENTS

This section helps us understand the physical activities and requirements that are absolutely necessary to perform this job. It is not about your ability to perform these physical activities. Instead it is about what is required to do the work. Please identify the frequency and the importance of each of the physical requirements listed in this section.

Frequency

How frequently is the activity performed?

- 0 – Never
- 1 – Annually
- 2 – Quarterly (at least 3 times per year)
- 3 – Monthly (at least 8 times per year)
- 4 – Weekly (at least 3 times per month)
- 5 – Daily (at least 3 times per week)

Importance

How important is the activity in accomplishing the job's purpose?

- 0 – Not Important
- 1 – Somewhat Important
- 2 – Very Important
- 3 – Extremely Important

Physical Activity	Frequency	Importance
Climbing: Ascending or descending ladders, scaffolding, ramps, poles and the like, using feet and legs and/or hands and arms.		
Balancing: Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces.		
Stooping: Bending body downward and forward by bending spine at the waist.		
Kneeling: Bending legs at knee to come to a rest on knee or knees.		
Crouching: Bending the body downward and forward by bending leg and spine.		
Crawling: Moving about on hands and knees or hands and feet.		
Reaching: Extending hand(s) and arm(s) in any direction.		
Standing: Particularly for sustained periods of time.		
Walking: Moving about on foot to accomplish tasks, particularly for long distances (more than a mile).		
Pushing: Using upper extremities to press against something with steady force in order to thrust forward, downward or outward.		
Pulling: Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.		
Lifting: Raising objects from a lower to a higher position or moving objects horizontally from position-to-position requiring substantial use of the upper extremities and back muscles.		
Fingering: Picking, pinching, typing or otherwise working, primarily with fingers rather than with the whole hand or arm.		
Grasping: Applying pressure to an object with the fingers or palm.		
Feeling: Perceiving attributes of objects, such as size, shape, temperature or texture by touching the skin, particularly with fingertips.		

Physical Activity	Frequency	Importance
Talking: Expressing or exchanging ideas by means of the spoken word. Activities in which detailed or important spoken instructions must be conveyed to others accurately, loudly, or quickly.		
Hearing: Ability to receive detailed information through oral communication and to make fine discriminations in sound, such as when making fine adjustments on machined parts. Level of hearing roughly equivalent to detecting a soft whisper in a quiet room at a distance of one meter.		
Seeing: The ability to perceive the nature of objects by the eye. Seeing is important for hazardous jobs where defective seeing would result in injury and also jobs requiring special and minute accuracy, inspecting and sorting. A high degree of visual efficiency, placing intense and continuous demands on the eyes by moving machinery and other objects, is also considered important. Other important factors of seeing are acuity (near and far), depth perception (three dimensional vision), accommodation (adjustment of lens of eye to bring an object into sharp focus), field of vision (area that can be seen up and down or to the right or left while eyes are fixed on a given point) and color vision (ability to identify and distinguish colors).		
Repetitive Motions: Substantial repetitive movements (motions) of the wrists, hands, and/or fingers.		
Sedentary Work: Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects, including the human body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.		
Light Work: Exerting up to 20 pounds of force occasionally, and/or up to 10 pounds of force frequently, and/or a negligible amount of force constantly to move objects. If the use of arm and/or leg controls requires exertion of forces greater than that for Sedentary Work and the worker sits most of the time, the job is rated for Light Work.		
Medium Work: Exerting up to 50 pounds of force occasionally, and/or up to 20 pounds of force frequently, and/or up to 10 pounds of force constantly to move objects.		
Heavy Work: Exerting up to 100 pounds of force occasionally, and/or up to 50 pounds of force frequently, and/or up to 20 pounds of force constantly to move objects.		
Very Heavy Work: Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of force frequently, and/or in excess of 20 pounds of force constantly to move objects.		

2. WORKING CONDITIONS

The working conditions section helps us to understand the physical environment you are subjected to while performing your job duties. This section does not apply to conditions like an old office building but only those factors that have to do with the job itself. In this section, please place an X under the frequency that is most appropriate and add examples where appropriate that illustrate your working conditions. The condition should be unique to your job and not generally applicable to all employees with the organization. **Please note, there is a choice for “Does Not Apply,” if most of your work is in an office setting.**

Condition	Does Not Apply	Less than 25% of the time	25-50% of the time	More than 50% of the time	Example(s) (Optional)
Lift 30-50 pounds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Lift more than 50 pounds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Detailed visual work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Hazardous physical conditions (mechanical parts, electrical currents, vibration, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Atmospheric conditions (fumes, odors, dusts, gases, poor ventilation, wetness, humidity)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Fire	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Explosives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Hazardous materials (chemicals, blood and other body fluids, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Vibration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Elevated heights	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Extreme heat or cold	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Keyboarding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Inadequate lighting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Work space restricts movement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Intense noise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Environmental (imminent danger, threatening environment)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Work-related travel <i>If checked, please comment:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Unusual work-related stress <i>If checked, please comment:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

V: EMPLOYEE, SUPERVISOR, AND DEPARTMENT HEAD SIGNATURES

ADDITIONAL COMMENTS

Are there any additional comments you would like to make to be sure you have described your job adequately? (Use additional sheets if necessary).

EMPLOYEE CERTIFICATION

I certify that the above statements and responses are accurate and complete to the best of my knowledge.

Signed: _____ Date: _____

*Thank you for completing this questionnaire. After you or your group has completed your portion of the PDQ, **please submit it to your supervisor for review, signature, and comment.** Your supervisor will share with you any comments or suggestions before submitting the completed questionnaire to your department head and University Human Resources.*

TO BE COMPLETED BY THE IMMEDIATE SUPERVISOR AND DEPARTMENT HEAD

This section is to be used by the Supervisor to note any additional comments, additional duties or disagreements with any section of the questionnaire. **The Supervisor should not change anything written by the individual filling out the questionnaire or address any performance issues.** Please remember that this questionnaire is intended solely for the purpose of accurately describing the job in question. Carefully check the areas identified with arrows for accuracy as these are the most important in classifying the job. If these sections are not complete or are incorrect, please assist the employee in filling in the blanks when you review the questionnaire with him or her. If you disagree with any information provided or believe some information is missing, indicate in the space below the question number and your comments. **Please note the following page should have all three signatures to ensure all have read the completed questionnaire.**

Question No.	Comments

Please check the appropriate statement:

I agree with the employee's position questionnaire as written.

The above clarifications have been discussed with the employee, and the employee agrees with these clarifications.

The above clarifications have been discussed with the employee, and the employee disagrees with these clarifications.

Supervisor
Signature: _____ Date: _____

Department Head
Signature: _____ Date: _____

I have noted the modifications made by my supervisor and/or department head in the comments section above.

Employee
Signature: _____ Date: _____

Thank you for taking time to complete the PDQ and assist us with the classification study. To learn more about the HECCP project and/or share your feedback with the project team please visit our website at <http://www.maine.edu/system/hr/heccp.php>. Thanks again!