

**GUIDE TO COMPLETING THE POSITION DESCRIPTION QUESTIONNAIRE  
(Exempt Employees)**

This guide will aid you in completing the **Exempt Employees Position Description Questionnaire**. An exempt employee is an employee that is not eligible for overtime under the Fair Labor Standards Act. The completed questionnaire will serve as the basis for understanding and evaluating the job content. It is extremely important that you describe the position in clear, concise language so that someone unfamiliar with the position will be able to gain a total picture of what the job does, how it fits into the organization, how the job functions and how it is managed, simply by reading the questionnaire.

The instructions below are presented according to the specific section outlined in the questionnaire.

**DESCRIBE THE ORGANIZATION STRUCTURE YOU WORK IN**

**Organizational Structure:** Complete all the appropriate boxes in the chart below using job titles only. Attach organization charts as necessary.

Other Reporting Relationships:

Position Your Supervisor Reports to:  
**Vice President, Sales**

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Your Supervisor's Job Title:  
**Regional Sales Manager**

Your Job Title:  
**Sales Manager**

Other Jobs Reporting to Your Supervisor:

**Sales Manager (2)**

Subordinate Job Titles:	# of Employees in Unit
<b>Sr. Sales Rep.</b>	<b>5</b>
<b>Sales Rep.</b>	<b>5</b>
<b>Secretary</b>	<b>1</b>
<b>Order Clerk</b>	<b>1</b>

**Total: 12**

Check if you complete a performance evaluation for all subordinates

Check if you always recommend hiring/termination of subordinate.

**Why Does Your Job Exist?**

Describe the purpose of your job and the way your job contributes to achieving department objectives.

This section requires a brief, specific statement of why your position exists; what is the major end result. The purpose of this statement is to gauge the significance of your job from the overall organization's viewpoint.

The reason for such a succinct statement at the outset is so that the reader can immediately obtain an impression of how the position fits in to the overall organization. The statement should clearly distinguish your job from all different ones. In particular it should differentiate your job from your supervisor's job, from jobs that report to you and from other different jobs at the same level. Two sentences may be required in this summary if you indeed wear "two hats."

Ask yourself, "**What end results am I paid to achieve?**" or "**What is the primary purpose of the job?**"

This section will seldom exceed three or four lines. For example, "why does your job exist" for an Account Manager might read:

"Accountable for Southern California region sales activities by establishing and supporting chief client relations, to meet targeted sales objectives."

An illustration of how not to write "why does your job exist" for an Account Manager is:

"Responsible for meeting sales objectives via continuous contact with new and past clients, including the use of telephones, one-on-one meetings, various media advertising (television, radio, newspapers) and sales presentations at conferences. The sales technique may include negotiating special offers and/or pricing depending on whether the client is an ongoing credit-worthy client."

In conclusion, the "Why does your job exist" statement includes the overall end result which the job is expected to produce and some of the key means by which it achieves the end results. The means are not a detailed exhaustive listing of facts, but clear, specific ways in which the job gets done.

**Major Accountabilities:** List statements describing the results of your job; how you accomplish the results; and how the results are reviewed.

Major accountabilities are one-sentence statements of the important functions necessary to accomplish the end result which the job exists to achieve. Each statement should relate to an end result or objective which must be accomplished and against which some measurement of performance can be applied.

Examples of accountability statements for a Senior Accountant, Controller, and Manager, Data Processing are:

<b>Position</b>	<b>Major Activity</b>	<b>End Results Expected</b>
Senior Accountant	Secure sufficient operating bank lines...	... to provide operating entities with sufficient cash within annual budget guidelines.
Controller	Provides recommendations on investment strategy...	...to maximize the long-run returns on pension fund assets.
Manager, Data Processing	Establish an on-line distributed communications network...	...to contribute to faster information access and operating efficiencies for all user departments.

Note that in each sample accountability statement, an **action verb** is included (contribute, establish, provides, maximize) which implies the incumbent’s role or purpose in the organization. The object of each action verb is the “**why**”, or end result of the job. Be sure the action verb is the appropriate managerial level. (A glossary of action verbs is attached).

**Working Relationships:** Describe the routine contacts you need to have with other people INSIDE and OUTSIDE the organization.

List the individuals that you typically work with or contact both within and outside of your organization, other than your direct supervisors or subordinates. State the reason and the frequency of the contact. List the five most important contacts you need to get your job done. For example:

Contact	Reason for Contact	Frequency of Contact
Client	Program Report on Projects	Weekly
Vendors	Discuss Status of Service Delivery	Weekly
Treasurer	Discuss revenue collection projections	Monthly

**Freedom to Act:** Describe types of decisions you make, types of decisions referred to others, and how it is reviewed.

- Types of decisions you make without prior approval:

Describe any specific decision-making responsibilities you may have. In addition, indicate what actions you may take in order to facilitate the completion of your job. For example:

“I decide which overnight banking institution to use based upon yield and balances.”

- Types of decisions referred to higher authority or that are controlled by policy:

Indicate who you receive work direction from (most likely your immediate manager), how that individual provides instructions to you (written procedures, verbal, other), who reviews and approves your work and who you would go to if you had a question. For example:

“I receive overall work direction from my manager and work within established Company policies.”

- Describe the way in which your work is assigned and reviewed, and the frequency and type of guidance provided by your Supervisor/Manager.

Describe in what format your Supervisor/Manager provides your assignments, how often and how you are reviewed and the type of guidance available from your Supervisor.

“I meet with my Supervisor at various points during the day to discuss work progress.”

**Major Challenges:** Describe two or three of the most difficult problems you face in doing

your job and the means by which they are resolved.

In describing the nature and variety of your job's problem solving complexity, no doubt you will relate back to items already noted in other sections. The purpose of this section is to distinguish between what is "typical" and what is "very challenging" as you solve job related problems.

Some of the things you may want to consider in this section are:

- technical complexity
- growth potential
- job complexity
- economic and environmental aspects
- dual reporting relationships
- interdependence of various departments
- creative and innovative aspects

<b>Budget Responsibility:</b>	Dollar amount of financial measures controlled or impacted upon by your job.
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This section requires quantitative data that will help to provide some measure of the size or scope of the position. Data should be on an annual basis. Examples of measures include:

- Operating budget
- Sales revenues/objectives
- Capital budget
- Project budget
- Investment income
- Payroll for unit
- Payroll for cost of personnel supervised
- Buying or production volume

Positions which are individual contributors (i.e., Staff Positions) should indicate a value associated with the areas of your organization to which they provide service/advice.

**Knowledge and Skills:** List the experience, education, knowledge and skills required for effective functioning in this job.

List the knowledge, skills, experience and licenses preferred or required to perform the job in a fully competent manner. Do not describe your personal education and/or training and/or job experiences unless they directly relate to the job. Do not overstate the job requirements.

An example of an acceptable listing of knowledge and skills is listed below:

	List special technical, academic or other knowledge required as a minimum qualification in this job.		Describe how much and what type of additional work experience is required as a minimum for this job.
1	Accounting theory and principles	1	1-2 years in accounting position
2	Analytical skills to identify errors	2	Previous audit and budget experience
		3	Financial statement preparation

An example of an acceptable listing of **Preferred** knowledge and skills is shown below:

	Describe special technical, academic or other knowledge preferred in this job.		Describe how much and what type of additional work experience is preferred by someone in this job.
1	Certified Public Accountant	1	Industry experience
2	Negotiation skills to arrange financing	2	Tax compliance analysis

A listing of any license, registration or certification required to perform this job.

1	CA Driver's License
2	

**Comments?** Please add any comments which may be helpful in understanding this job and how it functions.

Have we covered everything? Please add any comments to complete our understanding of your job.

*Thank you for taking time to complete this questionnaire.*

<b>Manager's Comments:</b>	Please carefully read the incumbent's responses to this position description questionnaire and answer the questions below.
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1. What do you consider the most important accountability of this job?

“The most important accountability of this job is to ensure that the Student Activities organization is well managed and that student concerns are addressed.”

2. What do you consider the most important qualifications of an employee in this job?

“Good interpersonal skills, the ability to listen effectively, and effective collaboration with the student population to bring about the results.”

3. Does this questionnaire describe the job appropriately at the fully effective level? (Circle One)  
**YES NO** If the answer is NO, describe where you would change the emphasis.


**Supervisors: Please confirm that you read this questionnaire, and it is an accurate description of the position performed at a fully competent level.**

Signed: \_\_\_\_\_ Title: \_\_\_\_\_ Date: \_\_\_\_\_

**GLOSSARY OF ACTION VERBS**

<b>Administer</b>	Exercise and implement control over the performance of specific operations, approved plans, or established policies within the scope of limited and well-defined authority.
<b>Act</b>	Does or performs something; plays the part of; carries out an action; operates on functions in a specific way; produces as an effect.
<b>Advise</b>	Give information or opinion pertinent to a probable course of action.
<b>Analyze</b>	Study the factors of a problem to determine a proper solution.
<b>Appraise</b>	Exercise expert judgment of the value or status of proposals or performance.
<b>Approve</b>	Authorize action; exercise final authority; act independently without further consultation.
<b>Assign</b>	Appoint subordinates to accomplish specific responsibilities.
<b>Assist</b>	Take an active part or give support in performing a function.
<b>Assure/Ensure</b>	See to the completion of a task or assignment; make a doubtful thing certain; make secure.
<b>Audit</b>	Examine to verify accuracy, or conformity with requirements.
<b>Authorize</b>	Give subordinates the power or right to act by virtue of having final or definite authority.
<b>Conduct</b>	Exercise leadership in a project or study.
<b>Consult</b>	Seek opinion or advice of another.
<b>Control</b>	Exercise restraining or governing influence over activities to accomplish planned results by (1) establishing standards, (2) measuring work in progress, (3) interpreting results, and (4) taking corrective action.
<b>Coordinate</b>	Combine (through balancing, timing, integrating) the efforts of separate groups to accomplish a specific objective; coordination can be exercised without line authority.
<b>Counsel</b>	Give advice and guidance to another.
<b>Delegate</b>	Entrust to another's care and management.

<b>Determine</b>	Obtain definite and firsthand knowledge of.
<b>Develop</b>	Advance programs planning or personnel capabilities to a higher stage.
<b>Direct</b>	Authoritatively define, regulate or determine the activities of subordinate organizational units to achieve predetermined objectives.
<b>Establish</b>	Put into effect or determine conclusively; settle or appoint permanently.
<b>Estimate</b>	Gauge the probable amount or value of.
<b>Execute</b>	Put into effect according to a plan (see <b>Administer</b> ).
<b>Follow-up</b>	See that actions are carried out to the finish.
<b>Formulate</b>	Express in an exact or systematic form.
<b>Guide</b>	Show the way through the intermediate steps in a broad plan or course of action by advice or suggestion rather than by authoritative direction.
<b>Implement</b>	Complete, perform, fulfill; execute (as a policy); accomplish.
<b>Initiate</b>	Start, begin or introduce a program or action.
<b>Interpret</b>	Explain or clarify.
<b>Issue</b>	Send out or distribute officially.
<b>Maintain</b>	Keep in a state of efficiency or validity.
<b>Manage</b>	Plan, organize, and control dissimilar functions to achieve coordinated objectives by leading and directing subordinates without giving detailed supervision. (Also see <b>Superintend</b> and <b>Supervise</b> ).
<b>Motivate</b>	Inspire and stimulate subordinates to maximize their efforts and productivity.
<b>Negotiate</b>	Reach agreement on specific proposals through discussion or communication with others of a different viewpoint.
<b>Organize</b>	Set up plans and procedures for achieving objectives.
<b>Participate</b>	Take part in and share responsibility with others for action but without individual authority to take action.
<b>Perform</b>	Accomplish to completion.
<b>Plan</b>	Devise or determine a course of action to achieve a desired end result.
<b>Prepare</b>	Make ready for a specific purpose; put into written form.

<b>Present</b>	Offer for consideration.
<b>Promote</b>	Offer for consideration in a manner intended to attract favorable attention and influence, acceptance or support.
<b>Propose</b>	Offer for acceptance or adoption.
<b>Provide</b>	Furnish necessary information or services.
<b>Recommend</b>	Offer for acceptance and support a course of action to persons responsible for approval or authorization.
<b>Review</b>	Critically examine (completed work, reports, performance) with a view to amendment or improvement.
<b>Serve</b>	Actively carry out duties within the framework of a specialized activity, such as a committee.
<b>Superintend</b>	Plan, organize and control a function to achieve an objective by leading and directing subordinates without giving detailed supervision. (Also see <b>Manage</b> and <b>Supervise</b> ).
<b>Supervise</b>	Instruct subordinates in details or work they perform (either directly or by enforcement of well-established rules), allot work, observe performance in detail and work with subordinates to improve performance.