

Position Description Questionnaire (PDQ) Training Session

How to Complete the PDQ

June 2012

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Today's Objectives

1

Understand why the Position Description Questionnaire (PDQ) was developed

2

Review the new PDQ Tool and learn how to use it

3

Discuss the process for completing and submitting PDQs

Why Are PDQ's So Important?

The PDQ process allows employees and supervisors to describe the critical elements of work and responsibilities of Professional Faculty jobs which become the basis of Job Description Specifications

- **The PDQ process supports the overall compensation program development by:**
 - Providing clearly defined roles, responsibilities and accountabilities
 - Supporting the development of consistent and appropriate use of job titling across OSU
 - Developing accurate job specifications to precisely assess OSU's market pay competitiveness
 - Defining how staff may develop their own professional/career goals and meet the needs of OSU

- **PDQ output provides the foundation for several Human Resource programs:**
 - Compensation Management
 - Performance Appraisals
 - Recruitment
 - Staff Development

Benefits of the PDQ Process

The PDQ Tool is developed in a format that:

- Is easy to complete
- Is not highly dependent on individual writing styles
- Collects the same type of information for all positions in a clear, consistent format

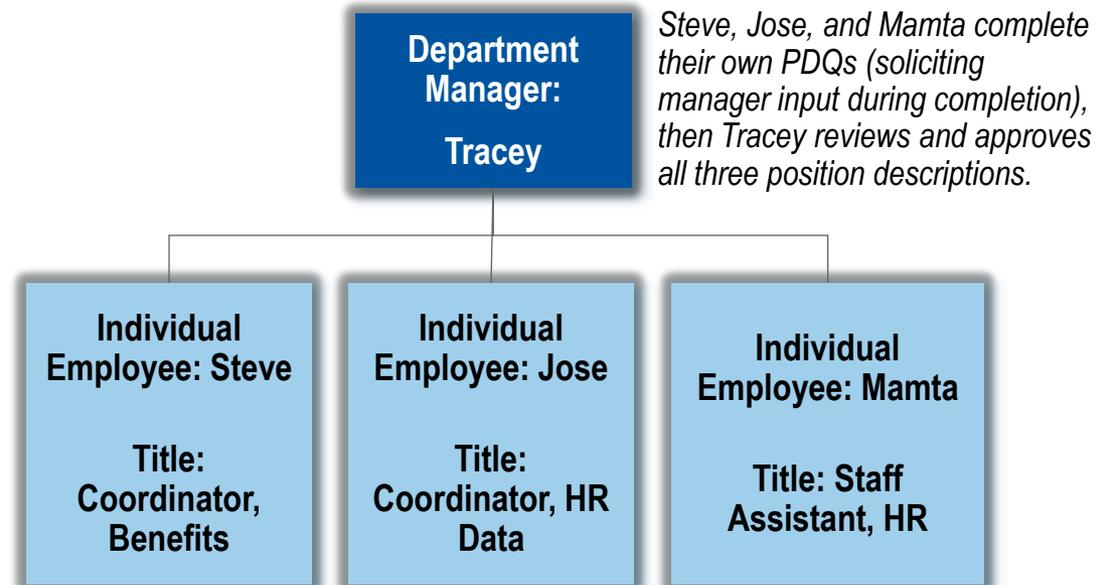
OSU and Sibson consultants will work together to ensure all critical information is captured to support the development of current and accurate Job Description Specifications.

Position Description Questionnaire

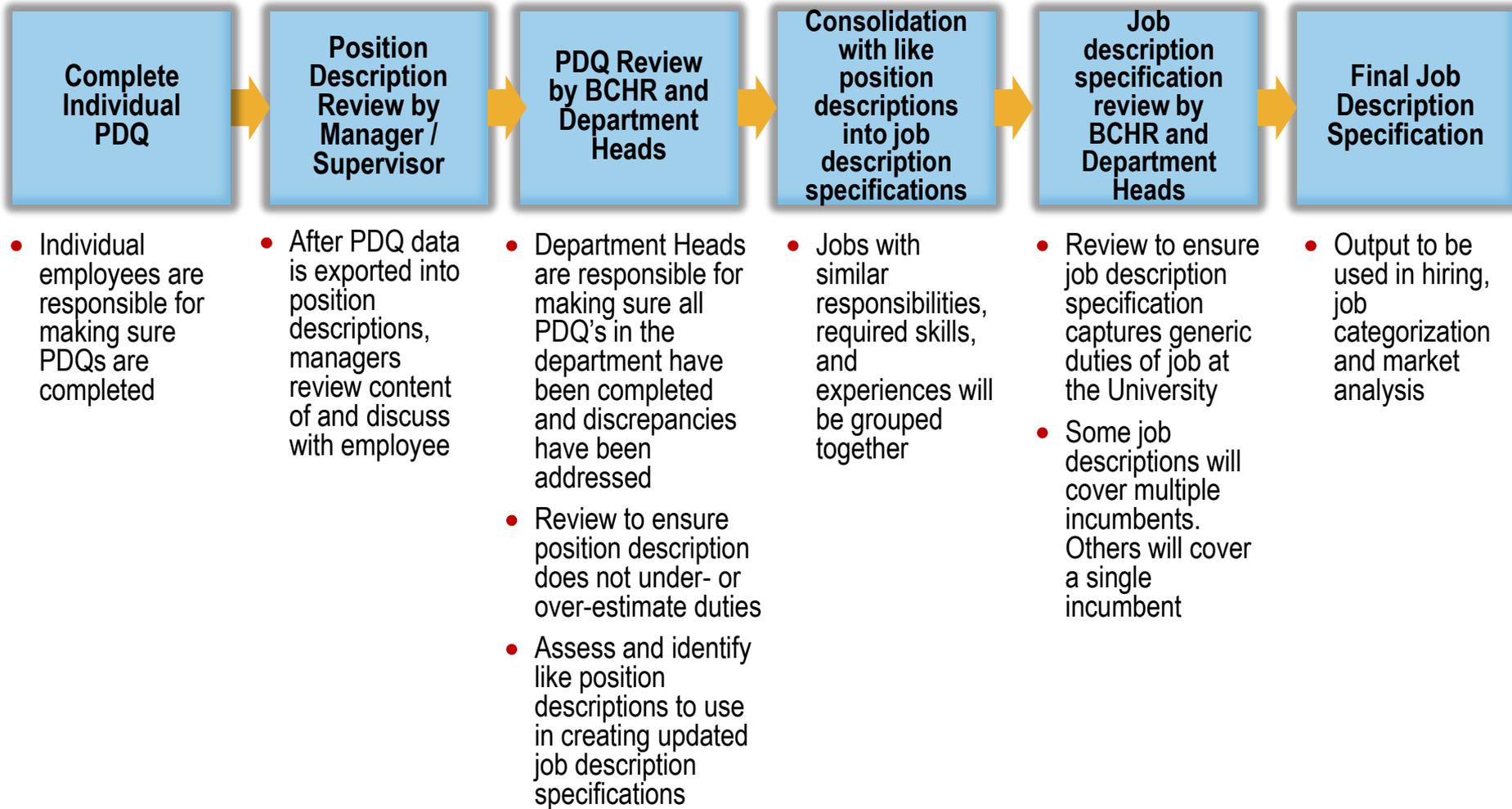
Roles in completing PDQs

- **Individual Employees** are responsible for:
 - Ensuring PDQs are complete and submitted on time
 - Reference documents (e.g., position descriptions, glossary) are utilized when available
- **Managers** are responsible for:
 - Ensuring all PDQs within their department are complete and accurate
 - Signing off on completed PDQs
 - Ensuring consensus on the final PDQ
- **BC HR Managers** will be responsible for:
 - Ensuring PDQs have been reviewed and discrepancies have been addressed

ILLUSTRATIVE EXAMPLE



Position Description Questionnaire Process



The result is a complete, up-to-date set of OSU Professional Faculty job description specifications for ongoing administration.

Important Considerations in Completing and Reviewing your PDQ

When completing the PDQ:

- Describe the duties of the position, as if you were recruiting to fill a vacancy
- Describe the current position duties that are typically performed, including cyclical work
- Help keep PDQ's consistent, by avoiding jargon, spelling out acronyms, and defining technical terms
- Exclude temporary assignments and responsibilities
- Use position titles or roles when referring to others at OSU

You will review and discuss the content of your draft position description questionnaire with your supervisor.

I. Introduction / Purpose

Shows introduction to and purpose of the Position Description Questionnaire

- Explains the **purpose** and intent of this questionnaire
- Provides **instructions** on how to complete the questionnaire
- Requires employee to provide their 9 digit **Employee ID number** (or alternative ID for incumbents with multiple positions notified by e-mail)

PURPOSE OF THIS QUESTIONNAIRE

The senior leadership of Oregon State University has engaged Sibson Consulting (a nationally recognized Human Resources consulting firm) to assist in the effort of bringing a fair and equitable Professional Faculty compensation system to OSU. With the guidance of Sibson, OSU established a project team and steering committee to lead this effort. After defining an overall compensation philosophy that outlines the guiding principles for the Program, including how pay will be determined, managed, and communicated, we are now in the process of creating job groupings and job titling guidelines.

Please enter your 9-digit employee ID number unless you hold multiple positions and have received an email containing alternative IDs. All Employee ID numbers, except for those receiving alternative ID emails, **MUST** be 9-digits. *Check your ID card if you cannot remember your employee ID number.*

9-digit Employee ID Number

II. Demographics

Provides important position identifying information to the employee

Your Employee ID will automatically pull up information to auto-populate the data in the **Demographics** section. If you hold multiple positions, you will receive an e-mail outlining the different employee IDs you need to enter to complete the PDQ.

Please confirm that the demographic information is correct.

You are able to change information in these fields if the information is not current.

DEMOGRAPHICS

Confirm the information below is correct.

First Name *	Last Name *	
<input type="text"/>	<input type="text"/>	
Employee ID *	Position # *	Your Job Title *
<input type="text"/>	<input type="text"/>	<input type="text"/>
Your Department *	<input type="text"/>	

III. Job Summary / Primary Job Responsibilities

Job Summary

Provides a brief overview of the position's primary purpose. Forms the basis for employee and manager expectations for accomplishments and performance; is considered the most important section of the PDQ Tool

- This is a brief **Job Summary** of the position's responsibilities at OSU
 - How would you briefly describe the overall purpose of your position in 30 seconds?
 - Sometimes this is easier to draft after you have finished the rest of the PDQ
 - If you need help, you can obtain your current position description from your BC HR Manager

Job Summary

Please summarize the primary purpose of your job in 3 – 4 sentences, briefly but specifically.

III. Primary Job Responsibilities

Forms the basis for employee and manager expectations for accomplishments and performance; is considered the most important section of the PDQ Tool

- **Primary Job Responsibilities** are those major on-going responsibilities performed in the position
 - Describe up to 8 major responsibilities (not tasks) starting with the most important
 - Write statements so that someone unfamiliar with what you do will understand what your position does
 - Approximate percentage of time spent on each function over the course of a year
 - Focus on responsibilities that take more than 5% of your time
 - Indicate level of importance of each responsibility

Primary Job Responsibilities

	Primary Job Responsibilities	Estimated % of Time	Level of Importance
1	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>	<input type="text"/>

Instructions and helpful tips on writing primary job responsibilities are provided on the following slides.

III. Primary Job Responsibilities – Helpful tips

DESCRIBING PRIMARY RESPONSIBILITIES CLEARLY

Use the following pattern to write a primary responsibility statement:

Action Word

+

Subject

+

Activities

For example:

Action Word



Subject



Reviews and validates transactions by ensuring completeness and accuracy of the account balances.



Activities

For a complete list of action words, please see the Glossary.

III. Detailed Information on Primary Job Responsibilities – Helpful Tips *continued*

DESCRIBING PRIMARY RESPONSIBILITIES CLEARLY *ADDITIONAL EXAMPLES*

- **Identifies funding opportunities for the University by:**
 - Cultivating potential new donors from prospect pool of contacts
 - Attending networking functions including dinners, receptions, and other special events

- **Manages IT Systems within the University by:**
 - Creating a strategic 5-year plan to ensure IT systems remain current with the needs of the University
 - Supervising, hiring, and evaluating IT support staff who are adequately trained to troubleshoot user computer issues

IV. Supervisory Responsibilities

Indicates whether the position supervises others

- Confirm whether the position has **supervisory responsibility**
 - Indicate the type of employees supervised if applicable
 - Select the highest level of responsibility for the supervision of other employees

SUPERVISORY RESPONSIBILITIES

Do you supervise employees?

- Yes
- No

Appointment Type and FTE of Employees Supervised

	Job Title	FTE	Headcount
Professional Faculty	<input type="text"/>	<input type="text"/>	<input type="text"/>
Classified	<input type="text"/>	<input type="text"/>	<input type="text"/>
Represented Student Employees	<input type="text"/>	<input type="text"/>	<input type="text"/>
Unrepresented Student Employees	<input type="text"/>	<input type="text"/>	<input type="text"/>

V. Fiscal Responsibility

Identifies if the employee is fiscally responsible

➤ Indicate whether the position has **fiscal/financial responsibility**

- Describe type and dollar amount of fiscal responsibility
- Outline level of fiscal responsibility for this position

FISCAL RESPONSIBILITY

Does your job have fiscal/financial responsibility?

- Yes
- No

Indicate the type and level of fiscal/financial responsibility of your job.

	N/A	Within Unit/Department	Within College/Division	Within University	External to OSU
Monitor, inform, report	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reconcile and/or move funds within budgets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Draft/Develop budgets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Approve within budgets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Approve budget exceptions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

VI. Academic Student Success

Identifies whether this position contributes to students' academic success

➤ Confirm whether the position has **academic/student success responsibility**

- Indicate level

ACADEMIC/STUDENT SUCCESS

Does your job include program responsibilities that contribute directly to student success and engagement?

- Yes
- No

Academic Advising *Check all that apply.*

- Undergraduate Students
- Graduate Students
- Lead Advisor

Student success and engagement (including coaching, mentoring, supplemental development, etc.) *Check all that apply.*

- Program delivery
- Program development
- Program leadership
- Program evaluation
- Program assessment

VII. Education

Indicates the REQUIRED level of education required to successfully perform the position's responsibilities

- Select the **education level** and **field of study** that best describes the amount of education **REQUIRED**
 - This may or may not be the same as your individual level of education
- Include any other relevant information

EDUCATION

6. Indicate the **REQUIRED** minimum level of education for this position at the point of hire to effectively perform the position's responsibilities. *These are not necessarily the same as your individual level of education, either currently or when you started.*

Once you have selected the **REQUIRED** level of education, indicate the field(s) of study if appropriate.

- High school diploma or GED
- Vocational or technical training
- Associate's degree, or vocational or technical school degree
- Bachelor's degree
- Master's degree
- Ph.D.

Enter your **REQUIRED** Field(s) of Study

VIII. Work Experience

Indicates the REQUIRED level of work experience required to successfully perform the position's responsibilities, as well as the PREFERRED level of work experience

- Select the **work experience level** that best describes the amount of related experience REQUIRED or PREFERRED
 - This may or may not be the same as your individual experience
- Include any other relevant information

WORK EXPERIENCE

7. Indicate the **REQUIRED** minimum level of position-related experience for this position at the point of hire and the **PREFERRED** level of position-related experience required to effectively perform the position's responsibilities. *These are not necessarily the same as your individual level of experience, either currently or when you started.*

	Required	Preferred
Less than 12 months	<input type="checkbox"/>	<input type="checkbox"/>
1 – 3 years	<input type="checkbox"/>	<input type="checkbox"/>
3 – 5 years	<input type="checkbox"/>	<input type="checkbox"/>
5 – 8 years	<input type="checkbox"/>	<input type="checkbox"/>
More than 8 years	<input type="checkbox"/>	<input type="checkbox"/>
Other (please explain below)	<input type="checkbox"/>	<input type="checkbox"/>

IX. Knowledge

Indicates the knowledge required to effectively perform this position

- Indicate which entry matches the amount of **knowledge** required to effectively perform the primary job responsibilities of this position
 - Provide additional information if needed

KNOWLEDGE

- Specialized knowledge is not required.
- Basic working knowledge of fundamental concepts, practices, and procedures;
- Working knowledge of concepts, practices, and procedures; the ability to apply
- Comprehensive knowledge of concepts, practices, and procedures; the ability to handle unprecedented situations.

X. Problem Solving

Indicates the types of problems frequently encountered in this position

- Indicate the typical nature of the problems encountered in this position

PROBLEM SOLVING

- Problems encountered are routine, somewhat repetitive and generally solved by
- Problems are varied, requiring analysis or interpretation of the situation. Problem precedents and practices.
- Problems are highly varied, complex and often non-recurring; require novel and approaches may have to be developed.

XI. Independence of Action

Indicates the level of independence this position has in conducting work

- Select the answer that corresponds most closely to the position's degree of **independence of action**
 - Indicates the level of autonomy/discretion afforded to the position

INDEPENDENCE OF ACTION

- Work is routinely monitored by supervisor/manager; detailed instructions and procedures are provided.
- Work progress is monitored by supervisor/manager; incumbent follows precedents within general guidelines established by supervisor/manager.
- Results are defined and existing practices are used as guidelines to determine specific actions; supervisor/manager is available to resolve problems.
- Results are defined; incumbent sets own goals and determines how to accomplish them; precedents may exist; supervisor/manager provides broad guidance and overall direction.

To what extent will autonomy or discretion be afforded to this role?

- Autonomous decision making
- Specific processes or procedures will typically be followed
- Little discretion in work

XII. Skills

Describes the type and level of skills required to perform the position's responsibilities

- Indicate which types of **skills** (Analytical, Project Management, Technology, Administrative Support, Oral and Written Communication, Other) are required and indicate general level of expertise required:
 - **General:** Requires core skills necessary for the job
 - **Intermediate:** Requires some advanced skills that allow employee to adapt and handle some complex or non-routine situations
 - **Comprehensive:** Requires highly proficient and specialized skills that allow employee to function in situations that are varied, complex, and/or non-routine
- Not all skills will apply to all positions, in which case choose N/A
- Elaborate, if applicable

SKILLS

17. Analytical

Visualize, articulate, and solve problems quantitatively and/or qualitatively and make sound decisions based on available information

General Intermediate Comprehensive N/A

Please elaborate if applicable.

18. Project/Process Management

Plan, organize, and manage resources or processes to bring about the successful completion of specific project goals

General Intermediate Comprehensive N/A

Please elaborate if applicable.

XIII. Collaboration/Interaction

Indicates the nature of collaboration and/or service to others required by the job and whether this occurs in the department, in the university, or externally

- Select the nature of collaboration / interaction and/or services to others required in this position
- Indicate whether this occurs in the department, at the University level or externally

COLLABORATION/INTERACTION

23. Indicate the nature of collaboration and/or service to others required by your job and whether this occurs internally (with others at the organization) or externally (with the general public, vendors, media, other organizations, etc.) *Check all that apply.*

	Department/Unit	University Wide	External	N/A
Exchange routine, factual information and/or answer routine questions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exchange detailed information or resolve varied problems.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access and/or work with sensitive and/or confidential information.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identify needs/concerns of others, determine potential solutions, resolve or redirect appropriately.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Persuade, gain cooperation and acceptance of ideas or collaborate on significant projects.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resolve conflict, negotiate or collaborate on major projects.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Handle sensitive issues and facilitate collaboration at the highest level.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Develop and maintain relationships with key contacts to enhance workflow and work quality.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

XIV. Decision Making

Indicates position's typical decisions and their impact on the organization

- Indicate the level of **decisions** and their impact typically made by the position

DECISION MAKING

26. Indicate the type of impact of the decisions typically made by your job.

- Decisions generally only affect your job or specific functional area.
- Decisions may affect a work unit or area within a department; your job may contribute to business and operational decisions that affect the department.
- Decisions have major implications on the management and operations of an area within a department; your job may contribute to important strategy, operations, and business decisions that affect the department.
- Decisions have significant, broad implications for the management and operations of a division/entire organization; your job contributes to decisions on the overall strategy and direction of the entire organization.

Who is impacted by the actions of this position? *Check all that apply.*

- Entire University
- Functions across the University
- Department
- Direct team
- No significant impact on anyone
- Vendors/Suppliers/Contractors
- Donors and Alumni
- Students/Parents
- Other External Agencies and Institutions

XV. Breadth of Responsibility

Indicates the breadth of the position's responsibilities

- Select the answer that reflects the **primary duty** of the job, as well as the impact on **institution policy**

BREADTH OF RESPONSIBILITY

28. Indicate the primary duty of your job.

- Provide information and fulfill service requests.
- Facilitate and coordinate projects, events, operation, etc.
- Recognize problems, gather information, propose and/or implement solutions.
- Anticipate and proactively seek creative and comprehensive solutions to unusual and/or complex problems.

29. Indicate your job's impact on institution policy.

- Follow and implement policy
- Interpret and advise on policy
- Influence and participate in development of policy
- Develop and change policy

XVI. Special Conditions of Employment for the Position

Indicates special conditions of employment required for this position

- Indicate whether there are any special conditions of employment for this position

SPECIAL CONDITIONS OF EMPLOYMENT FOR THE POSITION

30. Oregon State University may require a criminal history check as a condition prior to any applicant, employer, or volunteer providing services in a critical or security-sensitive position. All practices associated with criminal history checks are to be conducted in a manner that supports the University's commitment to non-discrimination. **If this position is critical or security sensitive, or requires driving as an essential function, please check the appropriate box.**

- Has direct access to persons under 18 years of age or to student residence facilities because the person's work duties require the person to be present in the residence facility.
- Is providing information technology services and has control over, or access to, information technology systems that would allow the person to harm the information technology systems or the information contained in the systems.
- Has access to property where hazardous materials and other items controlled by state or federal laws or regulations are located.
- Has access to laboratories, nuclear facilities or utility plants to which access is restricted in order to protect the health or safety of the public.
- Has fiscal, financial aid, payroll or purchasing responsibilities as one of the person's primary responsibilities.
- Has access to personal information about employees or members of the public including Social Security numbers, dates of birth, driver license numbers, medical information, personal financial information or criminal background information.
- Has responsibility for the care, safety and security of animals.
- Driving is an essential function, this position must possess and maintain a current, valid driver's license and maintain a satisfactory driving record while serving in the position

XVII. Travel Required/Working Hours

Estimates amount of travel required in position and special working hours (if applicable)

- Estimate the percentage of overnight **travel required** in your position

TRAVEL REQUIRED

Indicate the percentage of overnight travel required of your job.

- Indicate your **working hours** and on-call requirements for the position if applicable

WORKING HOURS

Work hours

On-call status

XVIII. Additional Comments

Provides additional information about the position to fully understand the role, responsibilities, nature, and scope of the position that is not captured in any of the previous sections

- Examples of **additional information** include: unusual circumstances, cyclical, or anything else to help the reader understand the position better

ADDITIONAL COMMENTS

Please describe as clearly and concisely as possible any additional information that would be important to fully understand the role, nature and scope of your job.

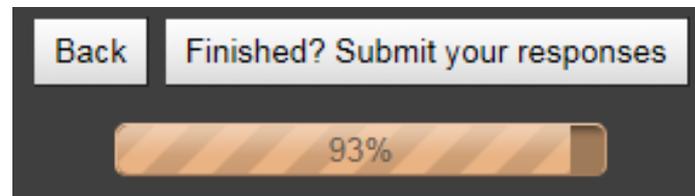
Submitting your PDQ

- In your final section, indicate that you believe your responses are an accurate representation of your responsibilities

Affirmation: *

I believe this is an accurate representation of the responsibilities of my position.

- Click the “Finished? Submit your responses” button when you are done



- **VERY IMPORTANT:** If at any point while completing the survey you want to save the results and continue the survey at some other point in time, please click on “next” button then on the “click here to save and continue survey later” button located at the very bottom of the screen.

Click Here to Save and Continue Survey Later

Next Steps and Contact Information

- Begin completing the PDQ using references provided and soliciting manager input
- Submit the completed PDQ by **July 6, 2012**
- Contact your Business Center for questions about the content of the PDQ or have questions during completion
- Contact Heather Riney or Julian Chen from Sibson Consulting if you encounter technical issues with the tool or have questions during completion



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Glossary of Action Verbs

- **ADJUST** - Bring to more satisfactory state; change to enhance a situation.
- **ADMINISTER** - Exercise and implement control over the performance of specific operations, approved plans, or established policies within the scope of limited and well-defined authority.
- **ADVISE** - Give information or opinion pertinent to a probable course of action.
- **ANALYZE** - Study the factors of a problem to determine a proper solution.
- **ARRANGE** - Put into suitable order or sequence; to make preparations or plan.
- **ASSIST** - Take an active part or give support in performing a function.
- **BALANCE** - Arrange so that one set of elements exactly equals another.
- **CALCULATE** - Work out by mathematical computation.
- **CHECK** - Compare with a source, original, or authority.
- **COMPILE** - Put together a series or group of facts or figures from somewhat related sources into a related whole; usually used in the sense of making a report.
- **COMPOSE** - Form by putting together; formulate or write.
- **CONDUCT** - Exercise leadership in a project or study.
- **COORDINATE** - Combine (through balancing, tuning, or integrating) the efforts of separate groups to accomplish a specific objective; coordination can be exercised without line authority.
- **COUNSEL** - Give advice and guidance to another.

Glossary of Action Verbs *continued*

- **DEMONSTRATE** - To show clearly; illustrate or explain with many examples.
- **DEVELOP** - Advance programs, planning or personnel capabilities to higher state.
- **DIRECT** - Authoritatively define, regulate, or determine the activities of subordinate organizational units to achieve predetermined objectives.
- **DISTRIBUTE** - Give out; divide among several.
- **EXECUTE** - Put into effect according to a plan (See "Administer").
- **FILE** - Arrange in order for preservation or reference; place among official records.
- **GATHER** - Come or bring together into a group mass or unit.
- **INITIATE** - Start, begin, or introduce a program or action.
- **INSTALL** - Set up for use or service.
- **LIST** - Place in a specified category; register.
- **MAINTAIN** - Keep in an existing state; to continue or preserve; keep in a state of efficiency or validity.
- **MANAGE** - Plan, organize, and control to achieve coordinated objectives by leading and directing subordinates without giving detailed supervision.
- **MONITOR** - Watch, observe, or check for a special purpose; keep track.
- **NEGOTIATE** - Reach agreement on specific proposals through discussion with others of a different viewpoint.
- **OBTAIN** - Gain or attain by planned action or effort.
- **OPERATE** - Perform a function.
- **ORGANIZE** - Set up plans and procedures for achieving objectives.

Glossary of Action Verbs *continued*

- **PARTICIPATE** - Take part in and share responsibility with others for action but without individual authority to take action.
- **PERFORM** - Carry out, accomplish; to do in a formal manner or according to a prescribed method.
- **PLAN** - Devise or determine a course of action to achieve a desired result.
- **PROVIDE** - Furnish necessary information or services.
- **POST** - Transfer an entry or item from one record to another.
- **PREPARE** - Make ready for further action or purpose.
- **PROCESS** - Perform a series of actions or operations leading to an end.
- **PROVE** - Determine extent of agreement or disagreement with intended relation between results.
- **RECOMMEND** - Offer for acceptance and support a course of action to persons responsible for approval or authorization.
- **RECORD** - Register, make a record of.
- **REPAIR** - Restore by replacing a part or putting together what is torn or broken; to fix.
- **REPORT** - Give an account of; make a written record or summary.
- **RESEARCH** - Careful or diligent search; investigate or experiment with the aim of discovery and interpretation of facts.
- **REVIEW** - Critically examine (completed work, reports, performance) with a view to amendment or improvement.

Glossary of Action Verbs *continued*

- **SCHEDULE** - Plan a timetable; to set, appoint, or designate for a fixed time.
- **SORT** -Put in a certain place or rank according to kind, class or nature.
- **SUPERVISE** - Oversee or watch with authority work, proceedings, or progress; control employment status, including hiring, salary adjustment, promotion, termination; implies day-to-day concern with details of operation.
- **TABULATE** - Arrange figures or items in rows and columns; computing by means of a table.
- **TRANSCRIBE** - Make a written copy; dictated or recorded information in longhand or on a typewriter; transfer from one recording form to another.
- **VERIFY** - Determine the accuracy of one thing or figure in relation to other things or figures known to be accurate.