**Staff Position Description Guidelines/ Helpful Tips for Use by MPPs**

 General Information

It is important to keep position descriptions (PD) updated for many reasons including: 1) Classification and Compensation uses the PD to assign the appropriate classification which has a bearing on bargaining unit, benefits, salary range, FLSA status, etc. 2) Performance evaluation forms contain criteria such as knowledge of work, job skill level, etc., and it is important to have a current PD so employee is being evaluated on the correct duties 3) So employees are aware of the duties they have been assigned and what percentage of time their focus is. 4) The collective bargaining units require that a signed position description be maintained in each personnel file.

Through the process of job analysis, all staff positions are allocated to an appropriate classification based on job content. The job description is compared to the CSU Classification and Qualification Standards and the position is assigned to a classification where most of the duties fit.

The position description form should be completed by the  [HEERA Manager](https://perb.ca.gov/laws-and-regulations/) (MPP) in partnership with the employee who performs the duties. If a position description is being updated, **please give employee 7 calendar days to review and sign the PD**. Ensure the effective date listed on Page 1 has taken the 7 days into consideration.

**Requirements for Completing the Position Description Form**

* Obtain a copy of the previous PD for reference. Transfer the information to the current template form, updating as needed.
* Ensure that physically specific requirements are accurate and state how frequently the incumbent would be expected to complete these tasks.
* Review the PD for accessibility, focus on the purpose of job tasks instead of the method in which a task is performed.
* Avoid expressing conclusions or opinions about the difficulty of the work and/or how well it is done. For example, use “tracks and reconciles department budget” rather than “handles budget very well.”
* Generally, only MPP positions use terms such as “manage/supervise,” “hire/terminate,” “evaluate performance.” Staff cannot supervise other staff or student assistants. Other positions can “lead, oversee, coordinate, etc., “recommend for hire, or provide input to evaluations.” See next page of this form for guidelines on this topic.
* Avoid use of vague expressions, or abbreviations, form numbers, or phrases which have no meaning outside the immediate office or department.
* Spell out any acronym’s the first time they are used.
* “Advise and counsel students” is a duty that should only appear on Unit 4 (APC) PDs.
* Use gender neutral, third person language (ex: the incumbent/selected candidate will… vs. he/she will…).
* For the education and years of experience required, copy directly from the class standards. The exception is the Administrative Support Series. Please refer to the attachment for the minimum qualifications to use on a position description.
* In addition to other knowledge, skills, and abilities you list, please include the following phrase on all PDs: “Reading and comprehending, writing, communicating verbally, reasoning and analyzing.”
* If the position requires driving (even an electric cart), under the license section, please add “Valid CA drivers’ license and insurance.
* Please verify that the employee has signed the position description. If the employee “declines” to sign the PD, just write “declined to sign” on the signature line and send them an e-mail that they are still responsible for performing the duties assigned as listed on the PD and the PD will be filed in their personnel file. Attach the sent e-mail to the PD and send it to Class and Comp.
* Please ensure that an MPP also signs the position description. Your signature certifies that, to the best of your knowledge, the position description is complete and reflects an accurate description of the current duties and responsibilities of the position.

***Note*: The collective bargaining agreements provide that employee may request a review of their position, and that the request be honored. Management remains responsible for ensuring the position descriptions are accurate, and for correcting any inaccurate information before submitting the position description to Classification & Compensation Services**. **A current and accurate signed Position Description is required for each Staff / MPP position and must be on file in Human Resources.**

**CSUSB Position Description Guidelines for Lead and MPP Duties**

**Leads**

Under supervision, can duties that include, but are not limited to:

* Provide lead work direction to staff.
* Coordinate workflow and daily operations of the program/office.
* Train and coordinate work duties of staff.
* Provide input to the MPP on performance reviews.
* Provide recommendations to the MPP on hiring student assistants or staff.
* May bring issues and concerns regarding performance and operational subjects to the MPPs attention.
* Provide on-going informal coaching, feedback, and guidance to staff.

**MPPs**

Can perform the following duties:

* Manage, direct or supervise staff employees and other managers who report to them.
* Prepare and deliver performance evaluations and be the final signature.
* Hire, re-assign, suspend, layoff, recall, discharge employees.
* Provide counseling, corrective action and discipline (as allowed in collective bargaining agreements), as needed on performance related matters.
* Prepare and deliver Letters of Counsel and/or Reprimand, as appropriate.
* Reward and recommend for professional advancement (e.g., salary programs, in-ranges, and reclassifications as appropriate).
* Be involved in the early stages of the grievance resolution process.

**Leads CANNOT: hire, assign, transfer, reassign, suspend, lay off, recall, discharge, discipline, manage, or supervise employees. They also cannot initiate salary actions for employees or be involved in grievance meetings (employees in the Confidential classification are the exception), or be the final signature on a position description.**

**In general, per CSUSB Working Title Policy, leads should not have “Manager,” “Supervisor,” or “Director” as part of their working title. The exception would be certain Unit 6 and Unit 8 classifications that are “working supervisors.” This information is contained in their classification title and/or classification standard.**

*In the event of a discrepancy, the language in the specific collective bargaining agreement will supersede this document.*

Staff / MPP Position Description

|  |
| --- |
| HR USE ONLY  |
|  Conflict of Interest (COI) Designated: [ ]  Yes [ ]  No  Mandated Reporter: [ ]  Limited [ ]  General [ ]  N/A  | **HR Reviewed By & Date:**  |

Conflict of Interest Per Political Reform Act of 1974

If the person holding this position is considered a ‘Conflict of Interest Designate’, under the [Political Reform Act of 1974](https://www.csusb.edu/human-resources/current-employees/employee-relations/conflict-interest). They are required to comply with the requirements set forth in Conflict-of-Interest codes as a condition of employment.

Mandated Reporter Per CANRA

If the person holding this position is considered a ‘mandated reporter’, under the California Child Abuse and Neglect Reporting Act. They are required to comply with the requirements set forth in [CSU Executive Order 1083](https://calstate.policystat.com/policy/10927154/latest/#attachments/c69e6c3b-de81-4119-9dcb-ead514145a9a/EO-1083%20AttachB_Final%20Draft.pdf) as a condition of employment.

# SECTION I. POSITION INFORMATION:

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| --- |
| Position Information |
| **Reason for Position Description (Please check all that apply):** | [ ]  Classification Review [ ]  Update Position Description[ ]  New Position [ ]  Existing Position [ ]  Temporary Reassignment[ ]  Permanent Reassignment [ ]  Recruitment |
| **This position description is being submitted by:** | [ ]  Incumbent [ ]  HEERA Manager (MPP)[ ]  Appropriate Administrator |
| **Effective Date:** |  |
| **Department:** |  |
| **Division:** |  |
| **Employee Name:** |  |
| **Coyote ID:** |  |
| **Current Classification:** |  |
| **FLSA Status:***(exempt or non-exempt)* |  |
| **Working Title:** |  |
| **Time Base:** |  |
| **Name, Title and Administrative Level of HEERA Manager:** |  |

# SECTION II. PURPOSE OF POSITION:

State the basic purpose of the position in one or two specific statements.

* The purpose of this position is to

# SECTION III. MAJOR RESPONSIBILITIES:

Clearly list the major responsibilities/essential functions in descending order from the most important to the least important. Indicate approximate percentage of time spent in each (percentages should not be less than 5%). Essential Functions and Marginal Functions should have a combined total of 100%.

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| --- | --- | --- |
| **Description of Responsibilities:**  | **Essential or Marginal Function**  | **(%) Percent of Time** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
| Other Job-Related Duties as assigned | Marginal | 5 |
| **Total =100%** |  |

# SECTION IV. CHANGES IN RESPONSIBILITES:

1. What overall percentage of changes occurred in the assigned duties and responsibilities since the position was filled or the last review? Be specific. If responsibilities have increased or decreased, which ones and in what way? What new duties were added and what did they replace?

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| --- | --- | --- |
| **Changes in Responsibilities:**  | **(%) Percent of Change** | **Date Changed** |
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1. *Did the new duties transfer from another employee? If so, which employee? If the added duties*

*replace other assignments, what will happen to the duties that were removed? (List other positions*

*affected and summarize impact, if applicable.)*

# SECTION V. WORK DIRECTION OVER OTHERS:

If this position leads (or manages/supervises if MPP) other positions, then list the classifications. Indicate type of direction, whether direct (directly supervises the position and conducts performance evaluation, MPP Only) or indirect (acting in a lead capacity or assigning work).

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| --- | --- | --- |
| **Classification** | **Working Title** | **Type of work direction** **(Direct or Indirect)** |
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# SECTION VI. POSITION REQUIREMENTS:

1. *List education and years of experience required, as listed in Classification Standards. If applicable, include necessary certificates and licenses (Driver’s License).*
2. *Skills, knowledge, and abilities required for this position. As listed in Classification Standards.*
3. ***Background Check, Credit Check, and Sensitive Information:***
4. **Background Check**: *A background check must satisfactorily be completed before a candidate can be offered this position. Failure to satisfactorily complete the background check may affect the application status of applicants or continued employment of current CSU employees who apply for this position. The background check consists of the following: Employment and education verification, reference checks, and checks of the following systems and databases: National Social Security number/Address Locator, Felony/Misdemeanor, National Criminal Database, Federal Criminal, Department of Motor Vehicles, and National Sex Offender Registry.*
5. ***Credit Check****: Credit checks will only be performed for new hires or current employees who are voluntarily reassigned or reclassified into a position that requires a credit check. To determine if this position requires a credit check, please consult with Classification & Compensation Services and reference the* [*CSU Background Check Policy*](https://csyou.calstate.edu/Policies/HRPolicies/HR2017-17.pdf#search=background%20check%20policy) *located at:* [*https://csyou.calstate.edu/Policies/HRPolicies/HR2017-17.pdf#search=background%20check%20policy*](https://csyou.calstate.edu/Policies/HRPolicies/HR2017-17.pdf#search=background%20check%20policy)*. Does this position require a credit check?* ***Yes***[ ] ***No***[ ]
6. **Sensitive Position*:*** *For current employees who are voluntarily reassigned or reclassified to a sensitive position, a background check is also required. To determine if this position is a sensitive position, please consult with Human Resources and reference the* [*CSU Background Check Policy*](https://csyou.calstate.edu/Policies/HRPolicies/HR2017-17.pdf#search=background%20check%20policy) *located at:* [*https://www.csusb.edu/sites/csusb/files/Policy%20HR2017-17.pdf*](https://www.csusb.edu/sites/csusb/files/Policy%20HR2017-17.pdf) *, complete Attachment B. Does this position meet the criteria for a sensitive position?* ***Yes*** [ ]  ***No*** [ ]

# SECTION VII. PREFERRED REQUIREMENTS:

# SECTION VIII. SIGNATURES:

Signature indicates position description is an accurate and correct statement of duties and responsibilities assigned to position.

Incumbent Signature & Date

Appropriate Administrator (if applicable) Signature & Date

MPP/HEERA Manager (required) Signature & Date

# Attachment A

Complete for all positions

**To comply with the provisions of the Americans with Disabilities Act, specify the physical, mental, and environmental conditions of the essential functions of the job, please complete the sections below.**

**Physical Summary:** Choose one description out of the categories below that best describes this position.

[ ]   **Sedentary Work:** Involves mainly sitting. Walking and standing are minimal. Lifting is limited to lightweight objects (10 pounds or less).

[ ]   **Light Work:** Job involves some lifting of medium weight objects (10-20 pounds) and/or 10% -20% of the job involves standing or walking.

[ ]   **Medium Work:** Job **i**nvolves lifting heavy-weight objects (20-40 pounds) and/or 20%-40% of the job involves standing, squatting, kneeling, or walking. May require pushing or pulling objects within the weight limits.

[ ]   **Heavy Work:** Job involves lifting more than 40 pounds. Approximately half of the incumbent’s time will be spent walking, standing, squatting, kneeling, or climbing.

**Use the codes below for each of the items which most accurately describes the extent of the specific activity performed in this position.**

“C” = constantly or 6-8 hours per day “F” = frequently or 3-6 hours per day

“O” = occasionally or up to 3 hours per day “N” = never

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| --- | --- |
|  **Physical Requirements of the Position**  |  **Mental Requirements of the Position** |
|  | Bending (neck) |  | Reading & Comprehending |
|  | Bending (waist) |  | Writing |
|  | Climbing |  | Performing Calculations |
|  | Crawling |  | Communicating Orally |
|  | Kneeling |  | Reasoning & Analyzing |
|  | Pushing/Pulling |  | Decision Making |
|  | Sitting |  | Other: |
|  | Squatting |  | Other: |
|  | Standing | **Environmental Working Conditions** |
|  | Twisting (neck) |  | Exposure to variations in temperature/humidity |
|  | Twisting (waist) |  | Exposure to chemicals, gases, dust or fumes |
|  | Walking |  | Operates machinery or drives motorized equipment |
|  | Handling Objects |  | Exposure to bio-hazards |
|  | Manual dexterity |  | Working in normal office environment |
|  | Reach above/below shoulder |  | Uses specialized equipment |
|  | Using foot controls |  | Other: |
|  | Other: |  | Other: |

# Attachment B

Complete for all positions

***Sensitive Position:*** *For current employees who are voluntarily reassigned or reclassified to a sensitive position, a background check is also required. To determine if this position is a sensitive position, please consult with Human Resources and reference the CSU Background Check Policy located at:* [*https://www.csusb.edu/sites/csusb/files/Policy%20HR2017-17.pdf*](https://www.csusb.edu/sites/csusb/files/Policy%20HR2017-17.pdf) *.*

|  |
| --- |
| *Consideration for designation as a sensitive position per HR Technical Letter 2017-17* |
| 1. Does this position have responsibility for the care, safety, and security of people (including children and minors), animals, and CSU property?
 | [ ] Yes [ ]  No | Sexual offender registry check for those who perform work involving regular or direct contact with minor children and those who are identified as mandated reporters of child abuse and neglect under Executive Order 1083 and California Penal Code §11165.7(a). |
| 1. Does this position have authority to commit financial resources of the university through contracts greater than $10,000
 | [ ] Yes [ ]  No |  |
| 1. Does this position have access to, or control over, cash, checks, credit cards, and/or credit card account information?
 | [ ] Yes [ ]  No |  |
| 1. Does this position have responsibility or access/possession of building master or sub-master keys for building access?
 | [ ] Yes [ ]  No |  |
| 1. Does this position have access to controlled or hazardous substances?
 | [ ] Yes [ ]  No |  |
| 1. Does this position have access to and responsibility for detailed personally identifiable information about students, faculty, staff, or alumni that is protected, personal, or sensitive?
 | [ ] Yes [ ]  No |  |
| 1. Does this position have control over campus business processes, either through functional roles or system security access?
 | [ ] Yes [ ]  No |  |
| 1. Does this position have responsibilities that require the employee to possess a license, degree, credential or other certification to meet minimum job qualifications and/or to qualify for continued employment in a occupation or position?
 | [ ] Yes [ ]  No | Professional licensing, certification, and/or credential verification is required |
| 1. Does this position have responsibility for operating commercial vehicles, machinery or equipment that could pose environmental hazards or cause injury, illness, or death?
 | [ ] Yes [ ]  No | Motor Vehicle Records/Licensing Check is required |
| **If you answered yes to any of the questions above, this position shall be deemed a sensitive position which may require additional background components.**  |

# Attachment C

Complete for MPP Positions Only

**Mental Effort:**

Enter frequency of occurrence for all applicable activities using the following key:

**1=Never Occurs 2=Seldom Occurs 3=Sometimes Occurs 4=Occurs Often 5=Almost Always Occurs**

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| --- | --- |
| **Planning** | **Performance Evaluations** |
|  | Forecast |  | Determine Performance Standards |
|  | Set Program Goals |  | Authorize/Approve Awards |
|  | Determine Budget Allocations |  | Prepare Performance Evaluations |
|  | Establish, Implement, Revise Policies |  | Observe/Follow-Up daily |
|  |  |  | Correct Work/Behavior Problems |
| **Organization** | **Employee Relations** |
|  | Describe Relationships Between Functions |  | Initiate Corrective Action |
|  | Define Department/Divisional Structure |  | Authorize Formal Discipline |
|  | Establish Priorities to Meet Goals |  | Administer Collective Bargaining Agreements |
|  | Schedule Work for Employees |  | Prepares/Investigates Grievance Awards and Complaints |
|  | Implement procedures |  | Formulates/Represents University Position for Formal Grievances/Complaints |
|  | Determine work methods |  |  |
|  | Balance multiple tasks/projects |  |  |
| **Direction/Leadership/Supervision** | **Other** |
|  | Educate |  |  |
|  | Delegate |  |  |
|  | Coordinate |  |  |
|  | Coach/Train/Develop |  |  |
|  | Recommend Formal Training |  |  |
|  | Motivate |  |  |
|  | Instruct/Demonstrate |  |  |
|  | Schedule Staff/Readjust Schedule |  |  |
| **Staffing** |  |  |
|  | Define Roles |  |  |
|  | Give Input to Position Descriptions |  |  |
|  | Determine Selection Criteria |  |  |
|  | Recruit/Interview/Select |  |  |
|  | Orient Staff |  |  |
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