



# California State University, Monterey Bay

## Job Description Instructions

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1. Consult with HR for assistance in developing a new position.
  - Develop a list of proposed duties, required and preferred skills and qualifications
  - For typical assignments, refer to the appropriate [classification standards](#)
  - Use additional resources such as other CSUMB job descriptions, CSU job postings, Higher Ed Jobs, Chronicle of Higher Education, or O-Net
  - Create an updated organizational chart that shows the supervisor and any subordinates
2. To update an existing job description (JD):
  - Request a copy of a current JD from HR
  - Delete duties no longer performed
  - Add new major functions or responsibilities
  - Update/remove obsolete language
  - Add average percentage of time spent on each essential duty
3. Follow the format and standard content on the following template. Keep the job description to 2 pages.
4. Use track changes when updating a JD. The incumbent may assist the manager in drafting a revised JD.

### **JOB DESCRIPTION SECTIONS:**

#### **TITLE:**

The first line is for the working title. The working title should reflect the primary purpose of the position. The second line, in parenthesis, is the job classification title.

#### **PURPOSE:**

In 1 to 3 sentences, describe the major purpose or reason why position exists and the role it plays in the department or organization. Refer to the classification standards overview and the following table for the appropriate supervision language:

<b>Supervisory Level</b>	<b>Description</b>
Immediate/Direct Supervision	Incumbents are assigned work which is regularly reviewed. The methods of performing work are well established and outlined and assistance and guidelines are readily available.
General Supervision	Incumbents exercise some control over both the technical and administrative aspects of the work. Objectives may be set for the position but incumbents often work independently.
General Direction	Incumbents have broad responsibility for planning, organizing, and prioritizing work. Active control by the supervisor is only exercised on longer term goals and policy issues. Typical supervision level for middle managers and high level professionals.
Administrative Direction	Management decisions are comprehensive and the work function is broad. Typical supervision for high level or executive management positions.

### **ESSENTIAL DUTIES AND RESPONSIBILITIES:**

List 4-5 major responsibilities in order of priority with average percentages of no less than 5%. Percentage should total to 100%. List marginal duties, without percentages, under other duties as assigned.

Be clear and concise. Use action verbs (see attached list). Keep in mind that the JD is not meant to be a task list. Do not include all tasks that need to be performed, save the details for the position's desk procedures.

**KNOWLEDGE, SKILLS AND ABILITIES:**

Copy the language in the classification standards. For classifications with skill levels, the typical knowledge, skills and abilities can be viewed as a menu for possible KSAs.

**MINIMUM QUALIFICATIONS:**

Copy the education and experience required by the classification standards.

**SPECIALIZED SKILLS REQUIRED:**

For CSUEU positions (units 2,5,7,9) only. List required specialized skills, education, and experience that are above and beyond the classification standards. Examples include: supervisory experience, event coordination experience, public sector or higher education experience; skills in grant writing, training program development and presentation, budget analysis, project management, providing excellent customer service, etc.

**PREFERRED QUALIFICATIONS:**

Indicate desired qualifications that are above and beyond the minimum qualifications, such as additional years of experience, specialized experience, advanced education, certification, and training.

**PHYSICAL REQUIREMENTS:**

Specify the physical requirements of the job functions, such as lifting up to XX lbs, standing, etc. If none, delete this section.

**SPECIAL CONDITIONS OF EMPLOYMENT:**

In addition to the mandated reporter language already provided in the template, list license and certifications that must be acquired or maintained, FERPA requirements, and any job requirements related to travel, evening and/or weekend work hours, shift schedule, etc.,

**CONFLICT OF INTEREST DESIGNATION:**

This section is required for positions that have been designated as conflict of interest positions. Human Resources will determine whether this section needs to be added to the job description.

**WORK ENVIRONMENT:**

Specify environmental conditions that may be encountered while performing the functions of the job. For example, for administrative staff: very busy office environment with frequent interruptions, works at computer terminal for extended periods of time.

**POSITION ASSIGNMENT:**

Add incumbent name if position is filled. Indicate if this position is new or existing, provides lead work direction to other staff, and/or supervises student assistants. Provide the title of the immediate/direct MPP supervisor. For academic staff indicate chair or program director. Links to the classification standards and salary schedule are provided on the template for ease of finding the job code, bargaining unit, FLSA status, and salary range.

5. Manager reviews draft JD with incumbent and revises, as needed.
6. Manager e-mails draft JD to HR.
7. HR reviews draft, confirms classification and sends the manager a final version to review. Manager shares the draft with the incumbent and sends suggested changes to HR or accepts changes via email.
8. HR finalizes draft and signs the final JD. Employee receives and signs JD to acknowledge receipt.
9. The signed JD is placed in the personnel file. The employee's manager receives a copy via email.

**WORDS, WORDS, WORDS**

*The following list of action verbs is designed to assist in finding the strongest and most descriptive verb. The verbs are grouped together by broad categories. This list is followed by some common working definitions to provide consistency in interpreting key verbs at CSU.*

<p><b><u>Administrative/Mgmt</u></b>                      Administer                      Coordinate                      Decision maker                      Direct                      Lead                      Manage                      Oversee                      Supervise</p> <p><b><u>Admin Action</u></b>                      Advise                      Allocate                      Appoint                      Approve                      Assign                      Authorize                      Conduct                      Control                      Consult                      Decide                      Delegate                      Enforce                      Establish                      Execute                      Implement                      Initiate                      Organize                      Originate                      Plan                      Propose                      Recommend                      Refer                      Review                      Select                      Train</p> <p><b><u>Taking Action</u></b>                      Activate                      Encourage                      Expedite                      Implement                      Install                      Maintain                      Motivate                      Operate                      Retool                      Troubleshoot                      Update</p>	<p><b><u>Analyze/Evaluate</u></b>                      Appraise                      Analyze                      Ascertain                      Assemble                      Assess                      Balance                      Calculate                      Calibrate                      Check                      Compare                      Compile                      Consider                      Detect                      Determine                      Develop                      Diagnose                      Distinguish                      Estimate                      Evaluate                      Examine                      Forecast                      Identify                      Improve                      Inspect                      Interpret                      Investigate                      Judge                      Measure                      Plan                      Propose                      Rate                      Reconcile                      Report                      Research                      Resolve                      Review                      Solve                      Study                      Summarize                      Survey                      Test                      Troubleshoot</p>	<p><b><u>Receive/Provide</u></b>                      Accept                      Accumulate                      Acquire                      Arrange for                      Assemble                      Buy                      Collect                      Compile                      Deliver                      Distribute                      Exchange                      Forward                      Furnish                      Gather                      Inform                      Inquire                      Issue                      Mail                      Notify                      Prepare                      Process                      Procure                      Provide                      Purchase                      Receive                      Recruit                      Request                      Report                      Secure                      Send                      Solicit                      Submit                      Supply                      Transfer                      Withdraw</p> <p><b><u>Communication/Interactive</u></b>                      Communicate                      Consult                      Counsel                      Edit                      Explain                      Interview                      Negotiate                      Present                      Teach                      Write</p>	<p><b><u>Control</u></b>                      Audit                      Check                      Conserve                      Control                      Edit                      Enforce                      Ensure                      Guarantee                      Inspect                      Monitor                      Prevent                      Protect                      Regulate                      Restrict                      Review                      Schedule                      Track                      Validate                      Verify</p> <p><b><u>Create</u></b>                      Adapt                      Create                      Design                      Devise                      Develop                      Establish                      Express                      Fabricate                      Forecast                      Initiate                      Install                      Originate</p> <p><b><u>Assisting Verbs</u></b>  <i>These verbs should only be used when they are an accurate description of the work/role performed.</i>                      Advise                      Aid                      Assist                      Cooperate                      Guide                      Help                      Participate</p>
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**Key Definitions – The following definitions help to clarify key commonly used verbs.**

<p><b>Adapt</b> – To modify or change to fit specific new conditions or situations.</p> <p><b>Administer</b> – To direct the daily operations of a program and the execution of the program goals.</p> <p><b>Advise</b> – To offer informed opinions or give specialized information to others.</p> <p><b>Analyze</b> – Identify the elements of and critically examine and relate elements to each other or separately or in relation to the whole.</p> <p><b>Allocate</b> – To assign or apportion a resource for a specific reason.</p> <p><b>Appraise</b> – To compare or assess critically with established standards.</p> <p><b>Approve</b> – Exercise final decisive authority resulting in an action.</p> <p><b>Assign</b> – Specify tasks to be performed by others.</p> <p><b>Assist</b> – To help or aid, not directly responsible.</p> <p><b>Authorize</b> – To approve, usually conveys management level authority to approve.</p> <p><b>Bind</b> – Make a commitment resulting in a financial or other obligation or arrangement.</p> <p><b>Commit</b> – Pledge to a particular course of action.</p> <p><b>Compile</b> – Put together or assemble information or data in a new format.</p> <p><b>Conduct</b> – Organize and carry out an activity, often implies leadership role.</p> <p><b>Consult</b> – Actively provide expertise and advice.</p>	<p><b>Control</b> – Direct, regulate or guide the use of resources. May also refer to monitoring activities to ensure compliance with rules or expected results.</p> <p><b>Cooperate</b> – Act jointly with others.</p> <p><b>Coordinate</b> – Organize and regulate the related actions of others to attain results.</p> <p><b>Create</b> – Produce or develop using originality and ingenuity.</p> <p><b>Delegate</b> – Assign another person tasks or duties. Usually conveys the authority of the delegator.</p> <p><b>Develop</b> – To generate and form a plan, idea or concept over time. Usually implies study and analysis.</p> <p><b>Devise</b> – Form an idea or concept or plan that is a combination of ideas and often new application of principles or arrangement of parts.</p> <p><b>Direct</b> – To govern and have control over work operations. Usually implies establishing goals and objective, as well as operating standards.</p> <p><b>Execute</b> – Put into effect and carry out a plan of action.</p> <p><b>Evaluate</b> – To determine the significance, condition or value of something through careful study or appraisal.</p> <p><b>Forecast</b> – Predict future events or occurrences based on knowledge of the topic area and specified assumptions. Assumes analysis.</p> <p><b>Guide</b> – To direct another in a course of action.</p> <p><b>Implement</b> – To fulfill an action and carry it out to the point of usage.</p>
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**Improve** – Make better.

**Inform** – Communicate information to others.

**Initiate** – Set into motion or introduce.

**Inspect** – Examine applicable materials to determine quality and suitability for use.

**Instruct** – Teach, demonstrate and impart knowledge.

**Interpret** – Identify and explain the meaning and significance of something.

**Investigate** – Uncover facts by systematic research, analysis and examination of various sources.

**Lead** – To guide and provide work direction. Usually used in the context of lead work direction that involves assigning, prioritizing and reviewing the work of others.

**Maintain** – To keep in satisfactory condition.

**Manage** – Direct, control, plan and organize the operations of an organizational unit. Conveys authority for decision making and accountability for results.

**Monitor** – To watch and check on something.

**Negotiate** – Confer with others to reach agreement.

**Oversee** – Supervise/manage a functional area or operation without necessarily having people supervisory responsibility.

**Participate** – To have a share or part in something with others.

**Plan** – To develop an organized scheme for the execution of a project.

**Prepare** – To make ready in advance for some use, purpose or activity.

**Process** – Taking materials or actions **through a series of pre-determined steps.**

**Propose** – To develop a recommendation or suggestion for the consideration of others.

**Recommend** – Present a matter or proposal for action or approval.

**Reconcile** – To check, adjust, settle or to make or prove consistent.

**Research** – Critical investigation of a specific inquiry involving gathering information, reviewing and interpreting information and developing conclusions based on knowledge and facts uncovered.

**Review** – Examination and consideration of facts or results for accuracy, completeness and suitability.

**Select** – Choose what appears to be the best solution for a specific purpose.

**Study** – Process of applying thought, analysis and research to the subject under investigation.

**Supervise** – Personally oversee or control the work of others. Possesses authority to conduct or effectively recommend certain employee actions.

**Survey** – To take a general view of through inspection or examination.

**Train** – Teach, demonstrate and guide the work performance of others.

**Troubleshoot** – Locate and eliminate the source of a problem in the work flow.

**Validate** – To ensure something is founded in truth or sound data and reasoning.

## General Definitions

- **Knowledge** = Ability to recognize, recall, and interpret facts, theories, or principles gained from instruction or learned through experience. It is measured by the depth, scope, and the ability to integrate knowledge to address and solve problems
- **Skill** = A technical expertise or proficiency.
- **Ability** = A mental or physical aptitude, capability, or competence.
- **Education** = Formal schooling, instruction, or training in a program of study.
- **Experience** = A background of performing work-relevant activities.

The following definitions of knowledge modifiers will help to ensure consistency in defining knowledge requirements.

## Knowledge Definitions

<b>Knowledge Modifier</b>	<b>Definition</b>
<b>Basic</b>	Indicates a foundational background and understanding of the specialty or field. Often implies the ability to apply basic practices and an understanding of specialty terminology.
<b>General</b>	Indicates general familiarity with information contained in key source documents or the subject field or specialty. Implies the ability to use a source to find information based on a broad understanding of principles and practices applicable to the specialty, but does not imply a thorough or in-depth understanding.
<b>Working</b>	Working knowledge is more tangible than a general knowledge in that it's not only the ability to recall information, but also the ability to <b>readily apply commonly used information</b> . Typically requires demonstrated competence in applying general principles and practices applicable to the specialty.
<b>Thorough</b>	As stated, thorough understanding of all information. Assumes a complete and detailed background and understanding of all aspects of the specialty area. Often, implies involves knowledge of advanced principles, theories and practices.
<b>In-depth</b>	Implies a deeper and more detailed knowledge of the specialty area down to the salient details which allows for problem solving at a deep level. Usually involves knowledge of advanced principles, theories and practices.
<b>Comprehensive</b>	Used when a complete and extensive mastery, understanding and expertise in the specialty, and often associated specialties, is required. Implies knowledge of advanced principles and theories of specialty or subject area.

## Common Skill Statements

Skill Areas	Sample skill statements
<b>Arithmetic and Math Skills</b>	<ul style="list-style-type: none"> <li>- Skill in performing basic arithmetic operations to maintain the budget including addition, subtraction and calculating percent increases and averages.</li> <li>- Skill in computing ratios, percentages and rates for analyzing contracts.</li> <li>- Skill in performing basic accounting functions in order to post and balance ledgers, set up spread sheets and create summary reports.</li> <li>- Ability to perform business math, analyze budgetary data, and make projections requiring the ability to make inferences.</li> <li>- Ability to analyze complex technical data using logic and advanced quantitative reasoning requiring a background in algebra and statistics.</li> </ul>
<b>Business Writing Skills</b>	<ul style="list-style-type: none"> <li>- Ability to write grammatically correct routine correspondence.</li> <li>- Ability to write technical reports on subject matter for internal use.</li> <li>- Ability to write technical reports on technical subjects suitable for publication.</li> <li>- Ability to prepare concise, logical and grammatically correct analytical reports.</li> </ul>
<b>Communication and Public Speaking Skills</b>	<ul style="list-style-type: none"> <li>- Ability to make group presentation to provide information on changes in policies and procedures.</li> <li>- Ability to present complex technical information to non-technical audiences and convey understanding.</li> <li>- Skill in listening perceptively and conveying awareness in managing group meeting dynamics.</li> <li>- Skill in exchanging ideas and information with others for the development of policies and programs.</li> </ul>
<b>Relating Skills</b>	<ul style="list-style-type: none"> <li>- Skill in mediating between contending parties and reaching workable solutions.</li> <li>- Skill in working as a team member and collaborating with others to achieve required results.</li> <li>- Ability to establish and maintain cooperative working relationships with students, faculty and staff.</li> <li>- Skill in interacting with persons of diverse social and cultural backgrounds.</li> <li>- Ability to maintain composure in the face of resistance or hostility</li> <li>- Demonstrated commitment to customer service by providing timely responses to a high volume of requests.</li> <li>- Expert networking and interpersonal skills include strong consultative and persuasive skills to work with internal and external constituents.</li> </ul>
<b>Analytical Skills</b>	<ul style="list-style-type: none"> <li>- Skill in analyzing information, problems, situations or procedures to define problems, identify relevant factors, formulate logical conclusions and recognize alternative solutions and their implications.</li> <li>- Skill in organizing material and information in a systematic way to optimize efficiency.</li> <li>- Ability to analyze operational processes, including skill in modifying or adapting procedures based on the analysis.</li> <li>- Ability to gather, analyze and synthesize data and information from various sources, select pertinent information and integrate the information into reports providing conclusions and recommendations.</li> <li>- Ability to troubleshoot technology problems using a knowledge of error messages and operating system basics.</li> </ul>

Skill Areas	Sample skill statements
Self- and Other Management Skills	<ul style="list-style-type: none"> <li>- Ability to prioritize assignments and achieve work results under rigid deadlines in an environment with competing work demands.</li> <li>- Ability to coordinate and execute multiple projects while continually assessing shifting and competing priorities.</li> <li>- Ability to work with frequent distractions and achieve required work results.</li> <li>- Ability to independently follow through on work assignments with minimal direction.</li> <li>- Ability to work in situations where there may be ambiguity, but still be able to assess the problem and take action.</li> <li>- Ability to organize and direct workflow for the effective operation of the unit.</li> </ul>

### Physical Demands and Working Conditions

Finally, every position description must identify the physical demands of the position. The analysis of physical demands must include an estimate of the amount of time the demand is present and in performing which job functions. Generally less than one-third of the time is considered seldom or occasionally, between one-third and two-thirds of the time is referred to as occasionally or frequently, and more than two-thirds of the time is considered constantly.

Physical demands must be written to avoid unnecessarily exclusionary terms and must be associated with the essential duties of a position. For example, an individual can move about without necessarily needing to walk. The following chart assists in identifying ADA compliant terms for the most common physical demands.

Physical Demand	ADA Compliant Words	Position description requirement
Stand or sit	Stationary position	Must be able to remain in a stationary position on a constant basis.
Walk	Traverse, move	This position requires frequently needing to move about inside the office to access files and office equipment.
Handle or feel	Operate, activate, use, prepare, inspect, detect	Constantly operate a computer and related office machinery
Climb	Ascend, descend, traverse	Occasionally ascends/descends a ladder to service lights.
Stoop, kneel, crouch or crawl	Position self {to}	Position requires the need to constantly position self to maintain computers and networks in the labs including going under desks, in the service closet and crawl spaces.
Talk and hear	Communicate, converse, express, convey, exchange information	The position constantly communicates with students responding to their inquiries regarding course offerings and sequencings. Must be able to exchange accurate and timely information.
See	Detect, determine, assess, perceive, recognize, judge, inspect, observe	Must be able to detect defects in fabricated materials.
Carry and lift	Move, transport, install, remove	Frequently removes and moves recycling materials in containers weighing up to 50 pounds.
Exposure	Exposed, work around	Constantly works in outdoor weather conditions to maintain grounds.



**Environmental conditions and exposures include:** Outdoor or temperature exposure and changes, contact with liquids, noise levels, vibrations, fumes, odors, gases, dust, and potential work hazards (working on scaffolding, toxic chemicals, and exposure to asbestos, electric shock).

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