



JOB ANALYSIS QUESTIONNAIRE

PURPOSE AND INSTRUCTIONS

This job analysis questionnaire is designed to collect detailed information about the duties and responsibilities of the job as it currently exists. Please provide information about the job itself, and not about your performance in the job. The collected job data will be used to help develop or revise job descriptions and to help evaluate the job for appropriate classification.

Answers to the questionnaire should be honest, complete, and accurate about the job responsibilities and duties that are regularly performed as part of your job. Please include duties related to special projects or temporary assignments *only if* these duties are required as a regular part of the job.

This questionnaire is designed to collect data about most jobs; however, some questions may not apply to the job being analyzed. If two answers seem to fit the situation, select the one that works best.

Please check the box and provide the requested information that best describes the current job. When completing these sections, please keep in mind the following:

- Select the most appropriate answer(s) for each question.
- Read each definition carefully before answering.
- Consider the job, **not** the employee.
- Answer should be based on the job as it currently exists.



JOB ANALYSIS QUESTIONNAIRE

Please complete the following, if applicable:

☐ Request for Job Evaluation

☐ Request for Job Re-Evaluation

Requested Job Title: _Gift Processing Specialist_

Requested Pay Grade: _____

☐ New Position

☐ Vacant
Position

☐ Occupied Position

A. EMPLOYEE DATA (PLEASE PRINT):

Employee Name: _____ Telephone: _____ Date: _____

Division/College: _____ Department: _____

Job Cluster: _____ Working Title (if different): _____

Job Title: _____ Job Code (if applicable): _____

Supervisor's Name: _____

Supervisor's Title: _____

Designee or Division Head/Vice President Name _____

Designee or Division Head/Vice President Title _____

| | | |
|-------------|------------------|-----------------|
| FLSA: _____ | Pay Grade: _____ | EEO Code: _____ |
|-------------|------------------|-----------------|

Employment Type: ☐ Regular Full-time ☐ Temporary Full-time
☐ Regular Part-time ☐ Temporary Part-time
Number of hours scheduled to work each week: _____

How long has employee been in the current position: _____ Years _____ Months

What is the employee's effective hire date with the University: _____

B. PRIMARY PURPOSE OF POSITION

Please briefly summarize the purpose of your position. *(Limit summary to 1 to 2 sentences.)*

C. DUTIES AND RESPONSIBILITIES



JOB ANALYSIS QUESTIONNAIRE

Describe, *in order of importance*, specific duties and responsibilities and estimate the average percentage of time spent on each. If possible, use descriptive terms that relate to the objectives or end results of the job being performed. (Example: *Prepares charts and diagrams to assist in problem analysis, and submits recommendations for solutions*).

Each statement should be brief and concise, beginning with an action verb. Use a separate statement for each key task or responsibility.

- (1) Ensure that a task is not a restatement or overlap of another statement.
- (2) Review the order of importance and percentage of time.
- (3) Walk through the process in performing the task and consider the tools & resources used, people involved, types of decisions, outcomes, etc.
- (4) Use the Essential Functions Checklist below to determine if specific tasks are considered essential functions as defined under the Americans with Disabilities Act (ADA).

| MAJOR DUTIES & RESPONSIBILITIES | | | |
|--|--|--|-------------------------------|
| | List most important duties first | Essential Function <input checked="checked" type="checkbox"/> | Percentage (%) of time |
| | | <input type="checkbox"/> | |
| | | <input type="checkbox"/> | |
| | | <input type="checkbox"/> | |
| | | <input type="checkbox"/> | |
| | | <input type="checkbox"/> | |
| | Performs other job-related duties as required. | <input type="checkbox"/> | |



JOB ANALYSIS QUESTIONNAIRE

Essential Functions Checklist

In determining essential functions, consider first the purpose of the job and the importance of the actual job duties and responsibilities in achieving this purpose. For the purpose of the Americans with Disabilities Act (ADA), major functions or duties that are designated as "essential functions" are those fundamental job duties that must be performed with or without reasonable accommodation. The term "reasonable accommodation" may include:

(A) making existing facilities used by employees readily accessible to and usable by individuals with disabilities; and

(B) job restructuring, parttime or modified work schedules, reassignment to a vacant position, acquisition or modification of equipment or devices, appropriate adjustment or modifications of examinations, training materials or policies, the provision of qualified readers or interpreters, and other similar accommodations for individuals with disabilities.

The EEOC Guidelines on the ADA list the following types of evidence to determine whether or not the function in question is essential:

1. The employer's judgment as to which functions are essential
2. Written job descriptions prepared before advertising or interviewing applicants
3. The amount of time spent on the job performing the functions
4. The consequences of not requiring the incumbent to perform the function
5. The work experience of past incumbents in the job
6. The current work experience of incumbents in similar jobs
7. There are a limited number of other employees available to perform this function

Ask the following questions:

| |
|--|
| The job exists to do this function. |
| Removing this function from the job would fundamentally change the job. |
| There would be significant consequences if this function is not performed. |
| Special training or education is required. |
| A license is required. |
| This function is highly specialized. |

E. EDUCATION

Check the box which best indicates the **minimum** formal education requirements. (**Not the level of education the incumbent has, but the requirements for the job**)

Minimum Requirements

| | |
|--|---|
| <input type="checkbox"/> High School Diploma or GED | <input type="checkbox"/> Vocational/Technical/Business School |
| <input type="checkbox"/> Some College/Associate's Degree | <input type="checkbox"/> Bachelor's Degree |
| <input type="checkbox"/> Master's Degree | <input type="checkbox"/> Doctorate Degree |

Continuing education required in a field directly related to the incumbent's duties and responsibilities? **Yes** or **No**
If yes, please describe.



JOB ANALYSIS QUESTIONNAIRE

E. WORK EXPERIENCE

Level and type of experience needed: Please indicate the specific job experience that a new employee should bring to this position. For example, "accounting experience in an education environment" vs. "accounting experience". Be sure that the experience stated is what is actually required by the job, not what is preferred.

Check the box which best fits the **minimum** length of time spent in performing similar work and acquiring the skills and knowledge to qualify for this position. (Not necessarily the years of the incumbent's experience, but the job-related experience.)

| | |
|---|---|
| <input type="checkbox"/> Less than 6 months | <input type="checkbox"/> 6 months to 1 year |
| <input type="checkbox"/> 1 to 3 years | <input type="checkbox"/> 3 to 5 years |
| <input type="checkbox"/> 5 to 7 years | <input type="checkbox"/> 7+ years |

After starting the job, how much on-the-job training does it take to learn the job?

| | | |
|---|--|--|
| <input type="checkbox"/> Up to 1 month | <input type="checkbox"/> 1 to 3 months | <input type="checkbox"/> 3 to 6 months |
| <input type="checkbox"/> 6 months to 1 year | <input type="checkbox"/> 1 to 2 years | <input type="checkbox"/> More than 2 years |

F. TYPE OF SKILL AND/OR LICENSING/CERTIFICATION/REGISTRATION

Please indicate all specific skills and/or licensing/certification/registration **required (not preferred) to do this job**. For example, spreadsheet software proficiency may be a requirement for a secretarial job; journey license may be required for an electrician.

- ☐ None
- ☐ Requires professional licensing, certification or registration, such as registered nursing license, professional engineering license, certified public accountant, and so forth.

| <u>Software Skills</u> Ex: Word, Excel, Access, HRIS | <u>Certifications/Licensure</u> Ex: Registered Nurse | <u>OTHER SKILLS</u> |
|---|---|---------------------|
| <hr/> | <hr/> | <hr/> |
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JOB ANALYSIS QUESTIONNAIRE

G. LEADERSHIP/SUPERVISORY RESPONSIBILITIES

What is the nature and degree of the direct supervisory responsibility in this job – based on actual duties?

Definitions:

| | |
|--|--|
| <input type="checkbox"/> No supervisory responsibility | |
| <input type="checkbox"/> Work Leadership | <ul style="list-style-type: none"> • Supervises students only. • Provides guidance and leadership to employees and/or students for daily activities and assigned projects or tasks • Participates in performance evaluation of personnel performance (does not directly supervise) • May have project management responsibilities |
| <input type="checkbox"/> Supervisor over a section of a department <input type="checkbox"/> Assistant Manager over supervisors of a small department | <ul style="list-style-type: none"> • Supervises employees who generally perform the same work or similar work/tasks • May occasionally do the work of those supervised • Has HR responsibility for direct reports (confers with manager or director) • Provides input for budget preparation |
| <input type="checkbox"/> Manager of one department <input type="checkbox"/> Manager of more than one department | <ul style="list-style-type: none"> • Provides first-line management to department • Allocates resources according to priorities and within budget parameters • Has HR responsibilities for direct reports • Consults with Director on operational issues (including fiscal matters) |
| <input type="checkbox"/> Assistant Director | <ul style="list-style-type: none"> • Supervises managers of functional areas. • Typically reports to a Director. • Directs complex and varied work. • Has major budget and expenditure authority. • Develops and recommends policy for the department or program. • Has major HR responsibilities for staff. |
| <input type="checkbox"/> Director, through managers, of one department <input type="checkbox"/> Director, through managers, of more than one department | <ul style="list-style-type: none"> • Responsible for one or more departments or programs. • Typically reports to a senior executive officer (e.g., VP) • Typically directs exempt/professional and/or non-exempt employees • Directs more complex and varied work • Has full budget responsibilities for respective department(s) or program(s). • Recommends and authorizes policy implementation for the department or program. • Has full HR responsibility for staff direct reports |

How many positions report directly to you?

Number of students _____ Number of employees _____

How many positions report indirectly to you?

Number of students _____ Number of employees _____

Check applicable answer(s):

| | |
|---|--|
| <input type="checkbox"/> Recruits, screens, and interviews candidates | <input type="checkbox"/> Recommends candidates for hire |
| <input type="checkbox"/> Approves candidates for hire | <input type="checkbox"/> Assigns tasks or responsibilities to others |
| <input type="checkbox"/> Conducts training of others | <input type="checkbox"/> Monitors work performance |
| <input type="checkbox"/> Conducts performance appraisals | <input type="checkbox"/> Administers disciplinary action |
| <input type="checkbox"/> Recommends salary actions | <input type="checkbox"/> Approves salary actions |
| <input type="checkbox"/> Recommends termination of employees | <input type="checkbox"/> Approves termination of employees |



JOB ANALYSIS QUESTIONNAIRE

H. **PERSONAL /ORGANIZATIONAL CONTACTS**

Check applicable answer:

| | |
|--------------------------|--|
| <input type="checkbox"/> | Little or no contact with others. Purpose of contact is to provide and/or receive routine information or documents. |
| <input type="checkbox"/> | Some contact with others, including students, general public, visitors and University personnel. Purpose of contacts is to provide explanation or interpretation of information. May handle confidential information and some complex matters. |
| <input type="checkbox"/> | Regular and substantial contact with others. Contacts usually involve discussions related to policies and programs and may include proposal or grant writing, negotiation with vendors, solicitation of financial donations for the University, and the like. Handles sensitive, complex, and/or confidential information. |
| <input type="checkbox"/> | Extensive contact with others and usually involve several areas within the University and/or with community, government, business leaders, media and dignitaries. Typically handles highly sensitive and/or confidential information. |

If as a routine function of this position, list and explain the contacts for this position both inside and outside TSU. Do not list contacts with supervisors, co-workers, and subordinates.

| Persons or Organizations | Purpose | How Often | Inside/Outside TSU |
|--------------------------|---------|-----------|--------------------|
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I. **CUSTOMER SERVICE RELATIONSHIPS**

Check applicable answer:

| | |
|--------------------------|--|
| <input type="checkbox"/> | Requires normal courteous interaction and basic interpersonal skills and tact to communicate with others. Forwards complaints or non-routine inquiries or requests to someone else to handle. |
| <input type="checkbox"/> | Requires moderate interpersonal and communication skills to ensure that customer requests or needs are met. Acknowledges and clarifies customer inquiries, requests, or complaints to ensure that needs are identified, documented and addressed. |
| <input type="checkbox"/> | Assesses and diffuses problem situations and requires influencing others to reach consensus. Requires tact and diplomacy to handle difficult customer situations. Requires advanced interpersonal and communication skills to establish and maintain internal and external customer relationships. Explores alternatives and creative solutions to meeting the needs of the customer. |
| <input type="checkbox"/> | Anticipates customer needs and regularly motivates or influences others to deliver customer service excellence. May troubleshoot highly sensitive or confidential issues. Personally ensures problem resolution. Identifies barriers to effective customer service and sets customer service standards. Establishes a customer feedback system and holds self accountable for customer service excellence within the department. |

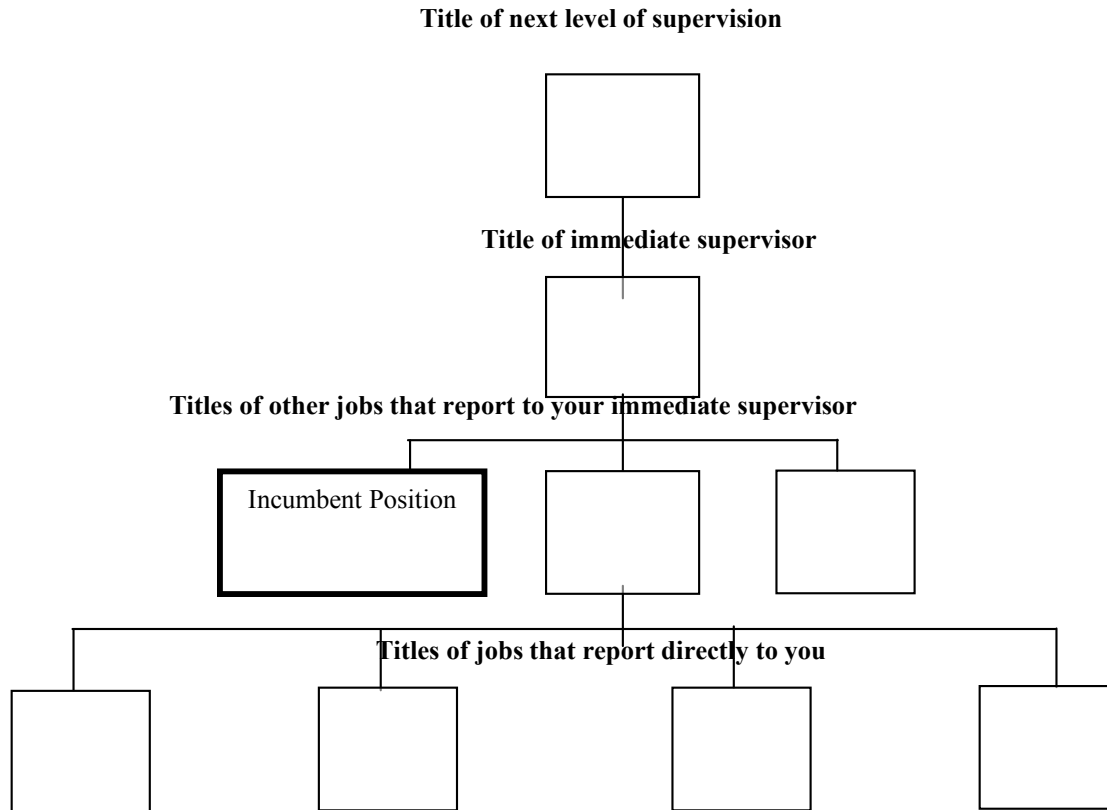


JOB ANALYSIS QUESTIONNAIRE



JOB ANALYSIS QUESTIONNAIRE

J. ORGANIZATIONAL CHART Please complete the organizational chart below:



K. WORK COMPLEXITY/BUDGET RESPONSIBILITY

Select the description that closely matches the level of variety, difficulty, and magnitude of tasks and responsibilities:

- ☐ Tasks are highly interrelated and simple. Work consists of fairly standard procedures and tasks. There is no responsibility for budget, revenues and/or expenditures.
- ☐ Tasks are multiple and focus more on single processes. Work is sometimes standardized and sometimes varied. There is no responsibility for budget, revenues and/or expenditures.
- ☐ Tasks are multiple and diverse with some interrelationship across processes. Work requires the direct application of a variety of procedures, policies and/or precedents. There is some budget responsibility and expenditure authority.
- ☐ Tasks and responsibilities require integration of diverse functional areas and involve variables that are more abstract. Work is substantially complex and varied, and requires the interpretation of technical and detailed guidelines, policies and procedures in combination. Position requires high level responsibility for budget, revenues, and/or expenditure authority.

Describe the nature and variety of your most complex, yet typical, work process or responsibility.



JOB ANALYSIS QUESTIONNAIRE

Briefly describe the size of your budget, extent of your signature authority, and your involvement in the budget process.

L. INDEPENDENT JUDGMENT/PROBLEM SOLVING

- ☐ Performs tasks and duties under direct supervision, using well-defined policies and procedures. Work is reviewed by supervisor. Limited opportunity exists for exercising independent judgment and decision making. Refers most problems to supervisor.
- ☐ Performs tasks and duties under general supervision, using established procedures and innovation. Chooses from limited alternatives to resolve problems. Occasional independent judgment is required to complete work assignments. Often makes recommendations to work procedures, policies and practices. Refers unusual problems to supervisor.
- ☐ Performs duties within scope of general University policies, procedures and objectives. Analyzes problems and performs needs assessments. Uses judgment in adapting broad guidelines to achieve desired result. Regular exercise of independent judgment within accepted practices. Makes recommendations that affect policies, procedures and practices. Refers exceptions to policy and procedures to the supervisor.
- ☐ Develops objectives and general policies and procedures for a specific program or functional area of responsibility within general scope of established operational goals and plans. Day-to-day work and decisions do not require direction or review by immediate supervisor. End results are reviewed by supervisor. Strategic issues are referred to supervisor.
- ☐ Develops strategic direction, goals, plans and policies for an area of responsibility. Sets broad objectives and is accountable for overall results in respective area of responsibility. Authority to make independent decisions on matters of significance. Requires high degree of independent judgment and problem solving of complex problems.

M. IMPACT OF DECISIONS

Inside Department

- ☐ None
- ☐ Minor
- ☐ Moderate
- ☐ Considerable
- ☐ Major

Briefly describe examples of your typical and key decisions that have impact within the department:



JOB ANALYSIS QUESTIONNAIRE

Outside Department

- ☐ None
- ☐ Minor
- ☐ Moderate
- ☐ Considerable
- ☐ Major

Briefly describe examples of your typical and key decisions that have impact outside the department:

Outside University

- ☐ None
- ☐ Minor
- ☐ Moderate
- ☐ Considerable
- ☐ Major

Briefly describe examples of your typical and key decisions that have impact outside the University:

N. WORKING/ENVIRONMENTAL CONDITIONS

Working Conditions

- ☐ Work is normally performed in a typical interior work environment which does not subject the employee to any hazardous or unpleasant elements.
- ☐ Work involves some exposure to moderate risk of accident and require following basic safety precautions.
- ☐ Work involves frequent exposure to unpleasant elements, such as extreme temperatures, dirt, dust, fumes, smoke, loud noises, chemicals, etc.
- ☐ Work involves continuous exposure to hazardous substances, potentially dangerous situations, unpleasant work conditions such as adverse weather conditions or extreme risk of accident or ill health.

Examples:

Physical Demand

- ☐ Position requires light physical activity.
- ☐ Position requires occasional or frequent moderate physical activity.
- ☐ Position requires continuous moderate or occasional heavy physical activity.
- ☐ Position requires frequent to continuous heavy physical activity.



JOB ANALYSIS QUESTIONNAIRE

Describe the most physically demanding activities of the position and the approximate percentage of the work hours involved in the activity:

O. GENERAL EMPLOYEE COMMENTS

Because no single questionnaire can cover every part of a job, use this section to record any other information that you consider important in understanding the job.

Comments about any compensation or classification issues related to your position:

P. IMMEDIATE SUPERVISOR'S COMMENT SECTION

The supervisor is to provide comments based on the supervisor's understanding of the job as it currently exists. The information provided by the employee is not to be changed. The employee's level of performance in the job is not a part of this review and is not to be considered.

Remarks about the incumbent's position:

Comments about any compensation or classification issues related to the incumbent's position:

Q. HUMAN RESOURCES DEPARTMENT

Approvals and Signatures

| | |
|---|-----------|
| Approved Title: | Job Code: |
| Compensation Analyst: | Date: |
| Human Resources Director: | Date: |
| Designee or Division Head/Vice President: | Date: |