

CHAPTER 3, POSITION DESCRIPTIONS

A position description, commonly called a "PD" by Federal workers, documents the major duties, responsibilities, and organizational relationships of a job. Because it serves as the official record of the classification of the job and is used to make many other personnel decisions, it should be written in clear, concise, and easy to understand language. [For more information on the use and development of position descriptions, see the [Introduction to the Position Classification Standards](#).]

Each agency determines who will prepare position descriptions. Depending on individual circumstances within an organization, the position description may be written by the employee in the job, the supervisor or manager, a personnel specialist, or any combination of these.

Position descriptions are written in one of two basic formats: narrative or FES. Narrative descriptions are most often used when the classification standard(s) covering the position is in a narrative, or non-FES, format. The FES format should be used when the grade of the position is determined by an FES standard because all the information pertinent to application of the FES factors may not be included in a narrative description. An FES position description, on the other hand, normally will include sufficient information to classify a position using either a narrative or an FES standard. Because of this, and because most new standards are issued in FES, many agencies have decided to prepare all position descriptions following the FES factor format.

OPM considers a position description to be adequate for classification purposes when it is--

- considered so by one knowledgeable of the occupational field involved and of the application of pertinent classification standards, principles, and policies; and
- supplemented by otherwise accurate, available, and current information on the organization, functions, programs, and procedures concerned.

The following guidance may assist in reaching this "standard of adequacy" and help make writing position descriptions a little easier.

NOTE: All position descriptions, whether in narrative or FES format, must include a statement by the supervisor attesting to the accuracy of the description.

NARRATIVE POSITION DESCRIPTIONS

A narrative description generally includes four different kinds of information.

1. *Introduction* - a statement of the primary purpose of the position and its relationship to the organization;
2. *Major Duties and Responsibilities* - a statement of the important, regular, and recurring duties and responsibilities assigned to the position;
3. *Controls Over the Position* - a statement of how the work is assigned, the kind of supervision and guidance received, and the kind of review given to work in process or upon completion; and
4. *Special Qualification Requirements* - a statement of any valid knowledge, skill, education, certification, etc., required by the position if it is not readily apparent from reading the description, such as level of typing skill, foreign language proficiency, or licensure.

Position classification categorizes, measures, and assigns a grade to the significant and substantive features of a position. It is, therefore, generally necessary to describe only the major duties and other important aspects of the position that may affect the final classification. Generally, major duties are those that occupy a significant portion of the employee's time. They should be only those duties currently assigned, observable, identified with the position's purpose and organization, and expected to continue or recur on a regular basis over a period of time, such as one year. The period of time considered should cover the full cycle of duties performed. This may vary from a few months for very simple clerical work to a more lengthy period for work that involves long term cases or projects. [For a discussion on "Determining the Duties to be Classified," see the [Introduction to the Position Classification Standards](#).]

It is not necessary to describe in detail the specific steps needed to carry out a duty; normally a few well chosen words will cover the work sufficiently. It may be helpful to indicate estimates of time spent on various duties, especially when the duties appear to be at different grade levels.

Because minor duties normally do not affect the classification of the position, are usually unimportant to work operations, and change frequently, it is generally not necessary to mention them in the position description. A statement, such as "Performs other duties as assigned," covers such situations adequately. Sometimes, however, minor duties can influence both grade and series determinations and the qualifications required for the work. In cases such as these, what seem to be minor duties must be described and evaluated.

The order in which duties are described may vary. Some positions are more easily described by stating the duties in order of their importance; some by following the sequence in which the work is performed; and others by grouping the duties according to function. When the

position is assigned work in more than one series or function, it is preferable to describe and group the duties of each series or function together for ease of classification.

Reviewing appropriate classification standards before developing position descriptions often makes the standards easier to use. If the standard for a particular kind of work refers, for example, to certain characteristics of a program or occupation as factors to be considered in classification, then it is helpful if position descriptions include information on these characteristics.

A good description is one that is a forthright presentation of the work assigned to a position. Avoid using general or indefinite terms, vague expressions, unnecessary detail, and repetition. Statements of duties are often clearest when they include a strong action verb and a noun that together define a duty or task. Misleading words serve no purpose. For example, "conducts research" should not be used for "searches files." Similarly, phrases that convey no meaning outside the immediate office should be eliminated wherever possible, such as names of forms, abbreviations, and acronyms. Statements that rely heavily on adjectives and adverbs and form conclusions and judgments do not add to the quality of the description, e.g., "performs difficult work." Finally, including specific names of organizations, projects, or assignments only makes the position description become outdated faster. It is better to describe the work performed rather than detailing names, places, dates, etc.

FES POSITION DESCRIPTIONS

The FES factor format is the distinctive way in which descriptions for positions covered by FES standards are written. This format consists of a brief listing of the major duties followed by a description of those duties in terms of the nine FES evaluation factors. The FES factor format is valuable because it matches exactly the way FES classification standards are written. Therefore, we would expect that agencies will write descriptions in FES format for those jobs covered by an FES standard. (While there are differences between narrative and FES descriptions, the guidance described above for narrative descriptions is useful for developing descriptions of both kinds.)

Two or more distinctly different kinds or levels of work in one position, as in a mixed series and/or mixed grade position, must be evaluated separately to determine the proper grade. When describing work under the FES factors, be particularly careful to show any significant differences in the way the factors apply to the different kinds or levels of work. It is not necessary to describe the nine factors for each kind or level if the differences can be explained in a sentence or phrase in the factor level description.

After assembling all the facts about the position and reviewing applicable classification standards and agency guides or instructions, it is time to develop the position description. The following material outlines the important considerations for writing each part of the description.

Major Duties - The "Major Duties" section answers the question, "What does the employee do in this position?" It should briefly describe the major duties performed in plain, clear language. It may be preceded by an introductory statement or paragraph that describes the general nature of the position and how it fits into the organization. If it is necessary to describe incidental or occasional duties, explain how often they occur, for example, "once a month..." or "in the absence of...."

The statements of major duties and the descriptions of the evaluation factors should complement one another. That is, the major duties should outline and supplement the factor descriptions.

FES Factors - Several of the nine FES factors have two or three individual concepts or subfactors that, when described, provide the information necessary to determine the grade of the position. Each of the FES factors is discussed below. [Chapter 2, "The Factor Evaluation System."](#) includes a summary of each factor and its subfactors. Refer to this summary as well as to the appropriate standard for help when developing a position description.

FACTOR 1, KNOWLEDGE REQUIRED BY THE POSITION

This factor answers two questions:

- what kind and level of knowledge and skills are needed; and
- how are they used in doing the work.

Under FES, the knowledge factor includes information or facts the employee must know to do the work. Sometimes a description of a skill requirement, which is generally observable, will be more precise. Show only the knowledge and skills essential for full performance of the work. Generally four or five statements are enough.

Do not describe educational, licensure, certification requirements, or degrees of proficiency unless these requirements can be validated. Include special knowledge or skill requirements that are essential to successful performance and would be used as selective factors for recruitment. (Supervisors and staffing specialists can help determine these requirements.) Factor 1 does not credit personal characteristics, such as patience or creativity; they are considered inherently in other factors. The following are brief examples of statements appropriate for this factor.

- Professional knowledge of civil engineering to design flood control structures;
- Knowledge of English grammar, spelling, and punctuation to correct obvious errors in draft material;

- Competitive level typing skill to produce documents on a personal computer using word processing software; or
- Skill in conversational Spanish to interview witnesses.

FACTOR 2, SUPERVISORY CONTROLS

This factor includes:

- how the work is assigned;
- what the employee's responsibility is for carrying out the work; and
- how the work is reviewed.

The first subfactor considers how the supervisor defines assignments to the employee. For example, a supervisor might assign work with: detailed instructions on how to do the work; instructions only for new, difficult, or unusual aspects of the work; suggestions for procedures to follow; or only information about the objectives, priorities, and deadlines.

The employee's responsibility measures the degree of independence the employee has in making decisions. For example: an employee might work exactly as instructed; refer situations not covered by instructions to the supervisor; or handle all work independently according to established policies and accepted practices.

The nature and extent of review of positions range from close and detailed, to spot check, to general review. Note that it is not just the degree of independence that is evaluated, but also the degree to which the nature of the work allows the employee to make decisions and commitments and to exercise judgment. For example, many clerical employees perform their work with considerable independence and receive very general review. This work is evaluated, however, at the lower levels of this factor because there is limited opportunity to exercise judgment and initiative.

The following illustrate how this factor could appear in a position description.

- The supervisor assigns work, advises on changes in procedures, and is available for assistance when required.
- Routine work is performed independently following set procedures. The work is reviewed for accuracy through spot checks, through complaints from customers, and through observation of the employee at work.
- The supervisor assigns work in terms of project objectives and basic priorities and is available for consultation in resolving controversial issues.

- The employee independently plans and carries out the projects and selects the approaches and methods to be used in solving problems.
- Completed projects are reviewed to determine that objectives have been met and are in compliance with agency policies and regulations.

FACTOR 3, GUIDELINES

This factor has two subfactors:

- the kind of guidelines used in doing the work; and
- how much judgment is needed to use them.

The first subfactor addresses the guides themselves. Employees may use guides, such as desk manuals, agency regulations, standard operating procedures, handbooks, policies, and precedents. It is not necessary to list every specific guideline used or to list a guide by its actual name. For example, "agency regulations covering voucher processing" is far more meaningful than "XYZ Regulation 3210."

Specific instructions, procedures, and policies may limit the opportunity to interpret or adapt the guidelines. On the other hand, the absence of directly applicable guidelines may require the employee to use considerable judgment in adapting current or developing new guidance.

The following are brief examples of descriptions for this factor.

- Written and oral guides provide specific instructions for doing the work.
- Most of these instructions are easily memorized and require little interpretation. When instructions do not apply, the problem is referred to the supervisor.
- Guidelines include agency regulations and directives, manufacturers' catalogs and handbooks, precedents, and files of previous projects.
- These guidelines are generally applicable, but the employee makes adaptations in dealing with problems and unusual situations.

FACTOR 4, COMPLEXITY

The three parts of this factor consider:

- the nature of the assignment;
- what the employee considers when deciding what must be done; and
- how difficult and original are the employee's actions or responses.

It is important to study the applicable FES standard before describing this factor because the kind of information needed differs from occupation to occupation.

Characterize the work in terms of the nature and variety of the tasks, methods, functions, projects, or programs carried out. This factor level should illustrate how the employee applies the knowledge and skills described in Factor 1.

Some employees have little or no choice about how to perform the work. Others may have to develop, analyze, or evaluate information before the work can progress. The level of difficulty in carrying out the work varies depending on whether the facts or conditions are clear-cut and apply directly to the problem or issue; vary according to the nature of the subject matter, phase, or problem handled; or involve unusual circumstances and incomplete or conflicting data.

In some situations the work is mastered easily, and the employee takes the obvious course of action. The level of difficulty and originality increases as the employee considers differences in courses of action and refines methods or develops new techniques, concepts, theories, or programs to solve problems.

The following examples show how descriptions for this factor level can differ depending on the occupation.

Mail Clerk -

- The assignment involves opening, sorting, and routing mail by general subject matter to approximately 150 delivery points and by specialized subject matter to 70 or 80 points.
- The employee examines the content of a variety of materials to identify and associate subject matter with closely related technical units.
- The employee determines proper routing or other action to take.

Engineer -

- Projects involve developing designs, plans, and specifications for a variety of utility systems for multistory buildings.
- The engineer considers factors, such as unusual local conditions, increased emphasis on energy conservation, and the relationship of problems and practices related to engineering fields.
- In making decisions the employee is often required to depart from past approaches and to extend traditional techniques or develop new ones to meet major objectives without compromising design and engineering principles.

FACTOR 5, SCOPE AND EFFECT

This factor includes:

- the purpose of the work; and
- the impact of the work product.

The first subfactor states the objective to be achieved. This may involve the conclusions reached and decisions or recommendations made; treatment or service provided; results of tests or research performed; or approvals or denials made. Do not confuse this subfactor with Factor 4, Complexity. Factor 4 deals with how the work is done to fulfill the purpose described in Factor 5.

The impact of the work product or service identifies who or what benefits from the employee's work and how this benefit is realized. Consider only the effect of properly performed work. When "responsibility for accuracy" is critical in a position, it should be reflected in the complexity involved and the special knowledge required.

The examples below show how to describe this factor for different kinds of work.

File Clerk -

- The purpose of the work is to maintain control and reference files for incoming correspondence.
- The work contributes to the efficiency of daily operations of the organization.

Engineer -

- The purpose of the work is to provide technical expertise in the design of....
- This work affects the quality of designs of mechanical systems aboard floating plants and equipment used in dredging activities throughout the agency nationwide.

FACTOR 6, PERSONAL CONTACTS

This is a one part factor covering the people contacted and the conditions under which the contacts take place. Creditable contacts are those made both face-to-face and by telephone. Describe contacts in terms of the work relationship, unusual circumstances in arranging the exchange, problems in identifying the role or authority of those taking part, or use of different ground rules in different situations. Do not include contacts with supervisors in this factor; they are credited under Factor 2.

FACTOR 7, PURPOSE OF CONTACTS

This one part factor explains the purpose of the contacts described in Factor 6. This factor can be described by the following examples: to give or exchange information; to resolve problems; to provide service; to motivate, influence, or interrogate persons; or to justify, defend, negotiate, or settle matters. As appropriate, information that could affect the nature of the contacts can be covered. This might include, for example, dealing with people who are skeptical, uncooperative, unreceptive, or hostile; or, settling controversial issues or arriving at compromise solutions with people who have different viewpoints, goals, or objectives.

Factors 6 and 7 presume that the same contacts will be evaluated for both factors. Therefore, use the same personal contacts that serve as the basis for the level selected for Factor 7 when selecting a level for Factor 6.

FACTOR 8, PHYSICAL DEMANDS

This one part factor describes the nature of physical demands placed on the employee. Efforts such as climbing, lifting, stooping, and reaching can be important. The factor level should state how often and how intense the activity is and should include any physical characteristics or special abilities needed, such as specific agility or dexterity requirements. This factor relates to the application of the knowledge and skills mentioned in Factor 1.

FACTOR 9, WORK ENVIRONMENT

This one part factor describes the physical surroundings in which the employee works and any special safety regulations or precautions that the employee must observe to avoid

mishaps or discomfort. It is not necessary to describe normal everyday safety precautions, such as use of safe work practices in an office or observance of fire regulations and traffic signals. This factor relates to the application of the knowledge and skills mentioned in Factor 1.

POSITION DESCRIPTIONS FOR SUPERVISORY POSITIONS

Position descriptions for supervisory positions should contain information of the type covered by the standard or guide used to classify the position. For example, if the standard contains criteria for evaluating supervisory personnel management functions, scope and variety of operations supervised, and contacts of the position, then you should discuss those elements in the position description. There is no specific requirement that you write supervisory position descriptions in a particular format. However, it is easier to evaluate the position if the description and the standard are compatible. Position descriptions should always include a description of the kind and degree of supervision exercised, e.g., authority to plan work, assign and review work, and evaluate performance.

There should be complete agreement between the supervision given as described in the supervisor's position description and the supervision received as described in the descriptions of subordinate positions.

CHAPTER 4, DETERMINING THE PAY SYSTEM AND SERIES

This chapter deals with deciding the correct pay system and series of a position. It is not an attempt to prescribe strictly a technical process, but rather to provide general guidance that applies to most classification situations. Also included is some more specific guidance that can be adapted and applied to the circumstances of each individual case.

UNDERSTANDING THE POSITION

A position description represents the official record of the duties and responsibilities assigned to a position or group of positions by a supervisor or manager in order to accomplish a specific job. It is the position that is classified, not the person assigned to it. This means that the work to be performed and the requirements to do that work are evaluated. The special capabilities or qualifications of the employee generally are not factors that influence the position's classification. [For guidance on "Impact of the Person on the Job," see [Chapter 5, "Determining the Grade,"](#) in this handbook; or, see the [Introduction to the Position Classification Standards.](#)]

Understanding the position to be classified is fundamental to the process of assigning the correct title, series, and grade. The position description must be developed carefully to capture the important features of the job so that, when evaluated against appropriate classification criteria, the position can be classified properly. None of the "steps" described below have any value if they are based on inadequate or misunderstood information. [More detailed information