

JOB CONTENT QUESTIONNAIRE

INSTRUCTION GUIDE

(Revised 6/1/09)

The Job Content Questionnaire (JCQ) is the official form (CS Form 55) used by the Hillsborough County Civil Service Office to document job data and related information required to conduct job evaluation studies and determine the appropriate job classification and pay grade of a classified position. The JCQ documents the major job duties and responsibilities assigned to a classified position, and the knowledge, skills, abilities, and other characteristics that are required to satisfactorily perform the job.

Instructions included in each section of the JCQ are usually self-explanatory; however, this JCQ instruction guide provides additional information, definitions, and practical examples to assist agency and department staff in completing this official document. Please review this instruction guide prior to completing the JCQ and contact a representative in the Classification and Compensation Division of the Civil Service Office if you have any questions.

TABLE OF CONTENTS

<u>GENERAL INFORMATION</u>	<u>PAGE</u>
1. A Completed JCQ is a "Position Description"	2
2. The Job Evaluation Process	2
3. Other Important Uses of the JCQ	2
4. Position Classification Action Request	2
5. Development of a "Multi-Position" Master JCQ	3
6. Integrity of Job Data Documented in the JCQ	3
7. General JCQ Information	3
8. Overview of Each Major JCQ Section	4
9. JCQ Completion and Review Process	4
10. Websites Referenced in the JCQ	5
<u>JCQ Cover Page</u>	
11. - Type of Action Requested	6
12. - Administrative Data Chart	6
<u>SECTION I – POSITION DESCRIPTION</u>	
13. Section I - A Position Purpose	9
14. Section I - B Major Job Duties	9
15. Section I - C Knowledge, Skills, and Abilities	16
16. Section I - D Supervisory Responsibilities	18
17. Section I - E Tools and Equipment Used	18
18. Section I - F Typical Work Assignments	18
19. Section I - G Typical Work Problem Resolved	18
20. Section I - H Work Related Contacts	18
<u>SECTION II – RESOURCE CONTROL</u>	
21. Section II - A Financial Authority	19
22. Section II - B Facilities and/or Materials Managed	19

SECTION III – JCQ REVIEW AND CERTIFICATIONS

23. Section III - A	Certification of Incumbent	19
24. Section III - B	Supervisor’s Comments and Certification	19
25. Section III - C	Additional Management Information	20
26. Section III - D	Manager’s Comments and Certification	26
27. Section III - E	Department Director’s Comments and Certification	26
28. Section III - F	Agency Head / Appointing Authority or Designated Representative’s Comments and Certification	26

1. A COMPLETED JCQ IS A “POSITION DESCRIPTION”

A properly completed Job Content Questionnaire is a “position description” that documents job data describing the nature, scope, and level of job duties and responsibilities currently assigned to a classified position, and the knowledge, skills, and abilities required to satisfactorily perform the job. Agency and department management staff are encouraged to submit an “updated” JCQ to revise the “position description” whenever any significant changes occur that affect a classified position.

Job data compiled in “past” and up-to-date “current” JCQ’s provide a valuable historical record that documents how a position has functioned within the organization over a period of time. The review of past and current JCQ’s completed for a position can facilitate the evaluation of major job duty changes that may affect the appropriate job classification and pay grade of the position.

2. THE JOB EVALUATION PROCESS

The Civil Service Office conducts a “job evaluation study” of a position whenever an agency or department requests a position classification action to “establish” a new classified position, or to “reclassify” an existing classified position. The Civil Service Office evaluates job data documented in the JCQ using the “Hay Point Factor Profile Job Evaluation Method” to assess the current organizational value of the classified position and determine the most appropriate pay grade for the job. The Civil Service Office reviews the pay grade and assigned job duties and responsibilities to allocate the position to an appropriate job classification.

3. OTHER IMPORTANT USES OF THE JCQ

In addition to documenting important information required to conduct a job evaluation study, job data compiled in the JCQ is used for applicant recruiting, testing, and selection purposes; employee job orientation, training, and employee performance management; establishing minimum qualifications; and developing or updating job classification descriptions. Current job data documented in an up-to-date JCQ is also used to facilitate compliance with various Federal employment laws such as the Equal Employment Opportunity Act (EEO), Americans with Disabilities Act (ADA), and the Fair Labor Standards Act (FLSA), etc.

4. POSITION CLASSIFICATION ACTION REQUEST

Agency and department management staff are required to submit a “current” up-to-date JCQ to the Civil Service Office whenever they request that a new classified position be “established”, or request that an existing classified position be “reclassified” to a more appropriate job classification and pay grade.

The requirement to complete a “current” JCQ has been waived in the past when an agency or department requested a position classification action that referenced a previously submitted JCQ for a “same or similar” position that could be used to conduct a job evaluation of the position. Unfortunately, many of the JCQ’s that were referenced for other positions were found to be considerably outdated, and in some instances could not be located, which delayed the job evaluation process. To ensure that job

evaluation studies are based on accurate and up-to-date job data, the Civil Service Office now requires that a “current” JCQ be submitted for the position with each request for a position classification action.

A “current” up-to-date JCQ for a position can easily be completed by “copying” applicable job data such as major job duties and knowledge, skill, and ability statements from Sections I and II of a previously completed JCQ for a “same or similar” position, and “pasting” applicable job data in the appropriate text boxes in Sections I and II of a “new” JCQ.

By completing a JCQ “Cover Page” to identify the position and completing “Section III” of the JCQ with current “certification signatures”, the agency or department staff can expedite completion of a “current” JCQ that accurately describes the position to be evaluated.

NOTE: If the agency or department staff has not retained a copy of a previously submitted JCQ for a “same or similar” position within their organization, they may access records in the new Image Now “JCQ Data Base”, or may request a copy of previously submitted JCQ’s from the Civil Service Office.

5. DEVELOPMENT OF A MULTI-POSITION “MASTER JCQ”

Some job classifications established by the Civil Service Office are appropriate for numerous positions that are assigned “identical” or “very similar” job duties and responsibilities, such as Law Enforcement Deputy, Fire Fighter, etc. Whenever applicable, the Civil Service Office will coordinate with agency and department management staff to develop a “Master JCQ” that documents current job data that is applicable for all positions assigned to a broad multi-position job classification. Position classification actions involving positions allocated to these multi-position job classifications can reference the “Master JCQ” and will not require a “current” JCQ for any position(s) to be established or reclassified.

6. INTEGRITY OF JOB DATA DOCUMENTED IN THE JCQ

Civil Service Office decisions related to job evaluation studies and position classification actions are based upon information documented in the JCQ, and directly affect employee compensation and the expenditure of public funds. **The falsification of any information documented in the JCQ is a misdemeanor and may result in disciplinary action up to and including termination for cause.**

All employees in the JCQ completion and review process are required to provide their “electronic signature” or their “hand-written signature” in Section III certifying that the information they provided in the JCQ is accurate and complete. Entering your name “on-line” in Section III and forwarding the JCQ to the next level of agency or department review constitutes your “electronic signature”.

Responses to questions documented in the JCQ are not to be changed or modified in any way. If the immediate supervisor, “first level” manager, department director, or other administrative employees in the JCQ completion and review process disagree with any information in the JCQ they are to provide their comments to “correct or clarify” the information in Section III, prior to signing the document and forwarding the JCQ to the next level of agency or department review.

7. GENERAL JCQ INFORMATION

The JCQ is designed to be completed as an “on-line” document by the incumbent, immediate supervisor, “first-level” manager, department director, and other agency or department administrative staff. To ensure that this official form is not modified in any manner, the JCQ is a “locked document” that can only accept job data entered in the gray “text boxes”.

The JCQ can be downloaded as a “word document” form to be completed and forwarded to each level of agency or department review as an e-mail attachment. Upon completion, agencies and departments are encouraged to submit a completed JCQ to the Civil Service Office as an e-mail attachment; however, a paper copy of this official document with hand-written certification signatures will be accepted.

NOTE: Prior to entering job data in the JCQ, employees are encouraged to develop “draft responses” to questions in a separate “word document” to maximize the use of Microsoft tools to edit the responses. Final responses can be “copied and pasted” in the appropriate text boxes that expand as needed to document all job data and related information required to accurately describe the position.

Agency and department management staff are responsible for ensuring that responses to all of the questions and requests for information in the JCQ have been provided prior to forwarding this official document to the Civil Service Office. Incomplete JCQ’s and related documents submitted to the Civil Service Office will be returned to the agency or department without action.

8. OVERVIEW OF EACH MAJOR JCQ SECTION

- A. The JCQ “**Cover Page**” is used to document important “administrative information” that identifies the position described in the JCQ and indicates whether the agency or department is requesting a position classification action to “establish” or “reclassify” a classified position.
- B. “**Section I**” of the JCQ (Position Description) documents the major job duties that are currently assigned to a classified position, and documents the knowledge, skills, abilities and other characteristics that are required to satisfactorily perform the job.
- C. “**Section II**” of the JCQ (Resource Control) documents other important responsibilities that may be assigned to the position including financial authority to spend or obligate funds, and the assignment of program, project, equipment, and/or facility management responsibilities.

NOTE: The first two sections of the JCQ are typically completed on-line by the incumbent in the position with assistance as needed from the immediate supervisor. In some instances, the immediate supervisor or the “first-level” manager may complete Sections I and II of the JCQ.

- D. “**Section III**” (JCQ Review and Certifications) documents the “**electronic**” or “**hand-written**” signature of the employee who completed Sections I and II of the JCQ certifying that all of the information they provided is accurate and complete. This section of the JCQ is also used to document any “comments” provided by the immediate supervisor, “first-level” manager, and other administrative staff in the JCQ review process to “correct” or “clarify” the information in this official document.

This section of the JCQ also compiles “additional management information” concerning the position and any position classification action request, and documents the “**electronic**” or “**hand-written**” signature of the immediate supervisor, “first-level” manager, department director, and other administrative staff certifying that all of the information in the JCQ is accurate and complete.

9. JCQ COMPLETION AND REVIEW PROCESS

- A. The agency or department staff initially completes the “Cover Page” of the JCQ to document administrative data that identifies the classified position and requests any position classification action to be evaluated by the Civil Service Office. Upon completion, the JCQ is typically forwarded to the incumbent in the position and/or the immediate supervisor as an e-mail attachment.
- B. Sections I and II of the JCQ are usually completed by the incumbent in the position with assistance as needed provided by the immediate supervisor. If the position is vacant, the immediate supervisor or the “first level” manager above the immediate supervisor typically completes Sections I and II.

Assuming the incumbent completes Sections I and II, they sign the JCQ in Section III – A (electronic or hand-written signature) certifying that all of the job data they provided is accurate and complete. If the immediate supervisor or “first level” manager completes these two sections, they sign the document in Section III – B or C and forward the JCQ to the next level of agency or department review.

- C. If the incumbent completed Sections I and II of the JCQ, the “immediate supervisor” typically reviews all of the incumbent’s responses and provides any comments in Section III - B to correct or clarify the job data. The immediate supervisor signs the JCQ in Section III - B certifying that all of the information is accurate and complete and forwards the document to the “first level” manager above the immediate supervisor for review.
- D. The “first level” manager reviews all of the job data in the JCQ and provides “addition management information” in Section III – C concerning the position and any requested position classification action. The manager provides any comments in Section III - D to correct or clarify the job data in the JCQ and signs the document certifying that all of the information is accurate and complete.
- The manager notifies the incumbent to update his/her on-line application with any additional education, training, and experience they possess to facilitate Civil Service Office approval that the incumbent meets the “minimum qualifications” established for the “proposed” job classification.
- The manager attaches a “current” organization chart and a “proposed” organization chart that “assumes” any requested position classification action will be approved by the Civil Service Office, and forwards the JCQ to the “department director” or next level of agency or department review.
- E. The “department director” reviews all of the information documented in the JCQ and provides any comments in Section III - E to correct or clarify this information. The director signs the document certifying that all of the information is accurate and complete and forwards the JCQ to the next level of agency or department review.
- F. The “agency head”, “appointing authority”, or “designated representative” reviews all of the information documented in the JCQ (including any “new” major job duties that may be identified in Section I – B and further described in Section III – C), and provides any comments in Section III - F to “correct or clarify” the information documented in the JCQ.

NOTE: If the agency or department head determines that any “new” major job duties assigned to the position are “not appropriate” for that position, these major job duties may be “transferred” from the position and “reassigned” to other positions that are “properly classified” to perform those job duties. An administrative action to “reassign” major job duties to other positions within the agency or department may eliminate the need to request a position classification action.

If the agency or department head agrees that all of the major job duties currently assigned to the position are required to efficiently meet the needs of the organization, they sign the document in Section III - F and forward the JCQ to the Civil Service Office to initiate a job evaluation study.

- G. Providing the JCQ, organization charts, and other required documents are properly completed, the Civil Service Office conducts a job evaluation study to determine the job classification and pay grade of the position and typically notifies the agency or department head of the determination within ten working days.

NOTE: Additional time will be required by the Civil Service Office to respond to requests to establish a new job classification, complete a labor market compensation survey, and/or to conduct a major job classification study that evaluates numerous positions that may be allocated to multiple job classifications.

10. WEBSITE REFERENCES IN THE JCQ

Website addresses are listed throughout the JCQ to reference information that may be needed to properly respond to questions and requests for job data included in the JCQ. However, because “direct links” to websites cannot be embedded in this locked electronic document you must enter the website address in the URL search bar to access these websites.

JCQ INSTRUCTION GUIDE

General instructions included in the JCQ (CSB Form 55) are usually self-explanatory; however, the following information provides guidance, examples, and recommended techniques to assist employees in documenting job data and related information that is needed to accurately describe a position.

JCQ COVER PAGE

TYPE OF ACTION REQUESTED

The first chart on the “Cover Page” identifies the “type of action” that is requested by the agency or department submitting the JCQ. If the request is to “establish” or “reclassify” one or more classified positions, enter the “number” of positions that are affected by the requested position classification action.

In some instances, agencies or departments may submit a “current” JCQ to document some changes to the job that are needed to update the “position description”, and no other action is requested.

ADMINISTRATIVE DATA CHART

The second chart on the “Cover Page” documents important “administrative data” that identifies the classified position described in the JCQ such as the Agency or Department name, the Position Number, the Job Classification Title, Job Class Code, Pay Grade Code, and applicable HRIS and Budget Codes.

All “Current Information” concerning the position is entered in the “text boxes” located in the “second column” of the chart. Corresponding “text boxes” for “Requested Information” located in the “third column” of the chart are only to be used if a requested action involves “new or different information” such as a request to change the “Job Classification Title” and “Job Class Code / Pay Grade Code” of a position.

JCQ COVER PAGE - EXAMPLE #1

REQUEST TO “RECLASSIFY” A POSITION

Assume a JCQ is being completed by the Property Appraiser’s Office to document the major job duties currently assigned to an encumbered “Office Assistant II” position, including some “new” major job duties that the management staff believes may support a “reclassification” of the position to “Office Assistant III”.

- A. To initiate a job evaluation study of this position the agency staff completes the JCQ “Cover Page” to document “current” and “requested” administrative data for the existing “Office Assistant II” position and identify the “type” of position classification action (i.e. reclassification) that is being requested.
- B. In the first chart located at the top of the “Cover Page” (TYPE OF ACTION REQUESTED) the agency staff marks the box indicating they are requesting the Civil Service Office “Reclassify” an existing position and that this position classification action request involves one (1) classified position.
- C. In the “first row” of second chart on the “Cover Page” (ADMINISTRATIVE DATA), the staff enters the agency’s name to the immediate right of the subject heading “Agency / Department Name”, in the text box located in the “second column” of the chart below the column heading “Current Information”.
- D. In the “second row” of the Administrative Data chart the agency staff enters current data that identifies the “Incumbent’s Name / Position Number” in the text box located in the “second column” of the chart below the column heading “Current Information”.

NOTE: If this position was “unencumbered” (not filled), the agency staff would enter “Vacant” in this “second column” text box and would list the current “Position Number” assigned to the position.

E. In the “third row” of the Administrative Data chart the agency staff enters job data that identifies the “Incumbent’s Employee ID Number” in the “second column” below the heading “Current Information”.

NOTE: If this position was currently “unencumbered” (not filled), the agency staff would enter “Vacant” in this “second column” text box.

F. In the “fourth row” of the Administrative Data chart the agency staff would enter the requested “Job Classification Title” (Office Assistant III) for the position, in the text box located in the “third column” of the chart below the column heading “Requested (if new of different)”.

NOTE: If the management staff is not aware of an “existing” job classification they believe may be more appropriate for the position, they could either enter “TBD” (to be determined), or they could leave this “requested” information blank.

G. In the “fifth row” of the chart the agency staff enters the “Job Class Code / Pay Grade Code” for the requested “Office Assistant III” job classification (A0108 / AI) in the text box located in the “third column” of the chart below the column heading “Requested (if new of different)”. If a job classification is not “requested”, the agency staff could either enter “TBD” (to be determined) in this text box, or they could leave this “requested” information blank.

NOTE: Please reference the official job classification titles, job class codes, and current pay grades that are listed in the Classification and Pay Plan located on the Civil Service Board website.

H. In the next several rows of the Administrative Data chart the agency staff enters other “current” job data for the position in the “second column” such as any approved “Working Title” that applies to the position; the current “Supervisor’s Name / Position Number”; and any HRIS codes and BOCC budget codes that apply to the position.

If any of this administrative information will change if the requested action is approved, enter the “current” information for the position in the “second column” and the “requested” information in the “third column” text boxes.

ADMINISTRATIVE DATA CHART – EXAMPLE #1

REQUEST TO “RECLASSIFY” A POSITION

Column 1 - “Subject Headings”

Column 2 - “Current Data”

Column 3 - “Requested Data”

	CURRENT INFORMATION	REQUESTED (if new or different)
AGENCY / DEPARTMENT NAME	Property Appraiser’s Office	
INCUMBENT(S) NAME / POSITION #	Jane Doe / 99999	
INCUMBENT(S) EMPLOYEE ID #	00001	
JOB CLASSIFICATION TITLE	Office Assistant II	Office Assistant III
JOB CLASS CODE / PAY GRADE CODE	A0106 / AG	A0108 / AI

The agency staff also provides the name, telephone number, and e-mail address of the designated “personnel representative” the Civil Service Office may contact to answer questions concerning the JCQ and/or any requested position classification action.

Upon completion of the “Cover Page”, the document is typically forwarded as an e-mail attachment to the incumbent and/or the immediate supervisor for completion of Sections I and II of the JCQ.

JCQ COVER PAGE - EXAMPLE #2

REQUEST TO “ESTABLISH” A NEW POSITION

Assume that funding for a “new” position in the Property Appraiser’s Office has been approved and a JCQ is being completed by the agency staff to document the major job duties that will be assigned to the “new” classified position. Assume the management staff believes that the major job duties to be assigned to the “new” position are appropriate for the “Office Assistant II” job classification that they are requesting.

- A. To initiate a job evaluation study that is required to “establish” (and properly classify) a “new” position the agency staff completes the JCQ “Cover Page” to identify the “type” of position classification action (Establish a New Position) that is requested, and to document all “current” and “requested” administrative data that applies to the “new” position.
- B. In the first chart located at the top of the “Cover Page” (TYPE OF ACTION REQUESTED) the agency staff marks the box indicating they are requesting that the Civil Service Office “Establish a New Position”, and indicate that this request involves establishing one (1) new classified position.
- C. In the “first row” of second chart on the “Cover Page” (ADMINISTRATIVE DATA), the staff enters the agency’s official name to the immediate right of the subject heading “Agency / Department Name”, in the “second column” text box below the column heading “Current Information”.
- D. In the “second row” to the right of the subject heading “Incumbent’s Name / Position Number”, the agency staff either enters NA (not applicable) in the text box located in the “third column” of the chart, or they could leave this “requested information” blank. Upon approval, the Civil Service Office will assign a “new position number” to the classified or unclassified position that is established.
- E. In the “third row” of the chart to right of the subject heading “Incumbent’s Employee ID Number” the agency staff enters NA (not applicable) in the text box located in the “third column” below the column heading “Requested (if new or different)”.
- F. In the “fourth row” the agency staff enters the requested “Job Classification Title” for the “new” position (Office Assistant II) in the text box located in the “third column” of the chart below the column heading “Requested (if new or different)”.

NOTE: If the management staff is not aware of an “existing” job classification they believe may be appropriate for the “new” position to be established, they would enter “TBD” (to be determined), or they could leave this text box blank.

- G. In the “fifth row” of the chart the agency staff enters the “Job Class Code / Pay Grade Code” for the requested “Office Assistant II” job classification (A0106 / AG) in the “third column” text box below the column heading “Requested (if new or different)”. Please refer to the “official” job classification titles, job class codes, and current pay grade codes listed in the Classification and Pay Plan located on the Civil Service Board website.
- H. In the next several rows of the Administrative Data chart the agency staff enters other “requested” job data in the “third column” of the chart such as any approved “Working Title” that will apply to the position; the “Supervisor’s Name / Position Number”; and any HRIS codes and BOCC budget codes that will apply to the new position.

With the exception of the “Agency / Department Name” that is entered in the “second column” of the chart, all of the other “requested” information required to “establish” a new position needs to be entered in the “third column” of the Administrative Data chart as displayed in the following example.

ADMINISTRATIVE DATA CHART – EXAMPLE #2

REQUEST TO “ESTABLISH” A NEW POSITION

Column 1 - “Subject Headings”

Column 2 - “Current Data”

Column 3 - “Requested Data”

	CURRENT INFORMATION	REQUESTED (if new or different)
AGENCY / DEPARTMENT NAME	Property Appraiser’s Office	
INCUMBENT(S) NAME / POSITION #		NA
INCUMBENT(S) EMPLOYEE ID #		NA
JOB CLASSIFICATION TITLE		Office Assistant II
JOB CLASS CODE / PAY GRADE CODE		A0106 / AG

The agency staff also provides the name, telephone number, and e-mail address of the designated “personnel representative” the Civil Service Office may contact to answer questions concerning the JCQ and/or any requested position classification action.

Upon completion of the “Cover Page”, the document is typically forwarded as an e-mail attachment to the incumbent and/or the immediate supervisor for completion of Sections I and II of the JCQ.

SECTION I

(POSITION DESCRIPTION)

SECTION I – A POSITION PURPOSE

The initial request for information requires a “brief” (one or two sentence) statement that “summarizes” the primary “purpose”, “function”, and/or the “reason” this position exists. Please do not list any of the major job duties that are currently assigned to this position. A major job duty is not a position purpose statement.

Identify the “purpose” that is served when the major job duties assigned to the position are performed. This brief statement often identifies the primary “function” that the position fulfills, and/or the basic “reason” that the position exists within the organization.

EXAMPLE #1: The primary purpose of this position is to supervise administrative office support functions within the Water Department and to provide administrative and secretarial office support services to the department director.

EXAMPLE #2: The primary purpose of this field position is to locate, read, and document data recorded by residential and commercial water meters to accurately record potable water usage data that is required to determine and process customer utility bills.

SECTION I – B MAJOR JOB DUTIES

GENERAL INFORMATION

This section of the JCQ includes the “List of Major Job Duties” chart that documents job data and related information that “identifies” and “describes” up to 15 major job duties currently assigned to the position. To provide some context to the list of major job duties the chart also documents the “order of importance” of the major job duties to fulfilling the primary purpose or function of the position, and the “approximate percentage” of an incumbent’s total work time that is required to perform each of the major job duties.

The following guidance, techniques, and examples are provided to assist employees in developing descriptive responses to requests for job data and other important information documented in this section.

LIMIT THE LIST TO 15 MAJOR JOB DUTIES

“Text boxes” are provided to identify and describe up to a maximum of 15 “major job duties”; however, most classified positions are not assigned that many major job duties and responsibilities. Classified positions are typically assigned a “primary group” of several major job duties that are directly related to the fundamental purpose or function of the job. A “secondary group” of related job duties are often assigned to classified positions that are generally not as important as the “primary group”, and are usually performed on a less frequent basis.

If more than 15 major job duties are initially identified, consider combining “similar or related job duties”, into a broader or more generalized major job duty statement to remain within the allotted space provided in the chart. Additional pages to identify and describe more than 15 major job duties cannot be added to this “locked electronic document”.

IDENTIFYING THE MAJOR JOB DUTIES

NOTE: It is recommended that the incumbent and the immediate supervisor (and/or the “first level” manager) participate in “initially” identifying the major job duties currently assigned to the position to ensure that this important list is accurate and complete.

Incumbents and supervisors are advised to use a “broad perspective” when identifying the major job duties to avoid listing numerous “tasks” or “procedural steps” in a work process that may be components of a broader major job duty.

It is also suggested that the employee who completes the “List of Major Job Duties” chart initially develop a “draft copy” of the major job duty statements in a separate “word document” to maximize the use of Microsoft tools prior to “copying and pasting” the major job duties in the applicable “text boxes”.

An effective technique that can be used to identify the major job duties involves listing the work assignments an incumbent fulfills on a “daily basis”, “weekly basis”, “bi-weekly basis”, and “monthly basis”, and if applicable, major job duties that are only performed on a “quarterly” and/or “annual basis”. A log of work assignments and special projects can be maintained by the incumbent and/or the immediate supervisor. A review of the incumbent’s job performance evaluations may also help identify the major job duties that are assigned to the position.

It is important to “identify” each of the major job duties with an introductory statement that uses an “action verb” to summarize the primary “activity” that is required to achieve a “desired outcome”. Examples of some common “action verbs” used to identify major job duties include:

Reviews; conducts; performs; writes; issues; enters; acts; prepares; monitors; provides; interprets; implements; examines; presents; conducts; operates; plans; researches; analyzes; establishes; develops; determines; coordinates; investigates, maintains; evaluates; verifies; updates; supervises; manages; directs; administers; ensures; organizes; collects; advises; designs; facilitates; audits; processes; trains; attends, schedules; etc.

DESCRIBING THE MAJOR JOB DUTIES

After “identifying” each major job duty using an “action verb”, develop a “description” that summarizes each major job duty in “sufficient detail” that someone who is not familiar with the position can understand what the major job duty involves. Use “non-technical” language and define all “acronyms” that are used.

While it is not necessary to address all of the following, these questions may prompt you to develop more informative statements to properly “describe” the major job duties assigned to the position.

“What” is the primary “work activity” or “action taken” to perform the major job duty?

“What” is the primary “purpose” or “reason” this major job duty is performed?

“What” is the “desired outcome” achieved when the major job duty is performed?

- “**What**” creates the organizational “need” to have the major job duty performed?
- “**Where**” does the work “originate from” that is accomplished by performing the major job duty?
- “**Why**” is performance of the major job duty important to the organization?
- “**Who**” does the incumbent interact with while performing the major job duty?
- “**How**” is the major job duty actually performed?
- “**Who**” are the primary “customers” that benefit from performance of the major job duty?
- “**When**” is the major job duty performed?
- “**Where**” is the major job duty performed?
- “**How**” frequently is the major job duty performed?
- “**How**” much “judgment and discretion” does the incumbent exercise when performing the major job duty?
- “**What**” tools, equipment, and other resources are used to perform the major job duty?
- “**What**” level of supervision does the incumbent work under when performing the major job duty?
- “**What**” direction or guidance is available to the incumbent when performing the major job duty?
- “**What**” Federal, State, and/or local laws or regulations are related to performance of the major job duty?

MAJOR JOB DUTY EXAMPLES

Job Duty ID # 1: “Ensures compliance with County Codes and Florida State Statutes”.

This major job duty statement does use an “action verb”; however, it is too vague and non-descriptive. This major job duty statement could easily apply to completely different positions such as a Law Enforcement Deputy, an Animal Control Officer, a Community Codes Investigator, a Consumer Protection Investigator, or many other positions that “ensure compliance” with a variety of Florida State Statutes and local codes.

This brief major job duty statement does not identify which Florida State Statutes and County codes are applicable to this position, or explain why these regulations are enforced. The statement does not indicate who needs to comply, when compliance is enforced, or even what the incumbent actually does to ensure compliance with some unspecified state and local regulations.

While addressing all of the who, what, when, where and why type questions may not always be necessary, a more descriptive major job duty statement would be:

Job Duty ID # 1: “Reviews (action verb) residential and commercial electrical system plans submitted by local building contractors to determine (action verb) whether the plans comply with County Code # 9999 and Florida State Statute FS 0001 that establish building construction standards. The incumbent meets (action verb) with licensed electrical contractors to discuss (action verb) deficiencies in the electrical system plans that are not in compliance with applicable codes and statutes, and recommends (action verb) changes that are needed to comply with all applicable building construction regulations. If the submitted plans are in compliance with all applicable building construction regulations the incumbent issues (action verb) an electrical building construction permit to authorize (action verb) installation of the electrical systems.

Another example of a “good” major job duty statement, followed by a “better” statement would be:

Job Duty ID # 2: Conducts job analysis by analyzing duties, responsibilities, knowledge, skills, abilities, training, and experience as documented on a Job Content Questionnaire to gain a good understanding of the job being performed in order to evaluate the job and determine its relative worth to the organization.

A “better” major job duty statement would be:

Job Duty ID # 2: Analyzes job duties, responsibilities, knowledge, skills, abilities, training, and experience as documented on a Job Content Questionnaire to gain a good understanding of the job being performed in order to evaluate the job to determine its proper pay level and job classification.

Other Examples of Major Job Duty Statements

Responsible for initial processing, cataloging and administrative handling of up to 300 – 500 new construction permit applications annually for a wide variety of proposed improvements such as environmental enhancements, shoreline protection structures, commercial port projects, dredging, residential docks, etc. Specific permitting tasks include:

Responsible for maintaining records including construction permit application files, updating various cross-referenced records including chronological logbooks, alphabetical indexes cataloged by the applicant's last name, computer data entry cataloged by location into the Microsoft Access Issued Permits Database.

Responsible for creation of various permit report summaries, drafting/distribution of routine letters, administrative preparation of permit documents including specific stipulations, maintenance or of departmental permit files. Application administration of standard work permits is more detailed and requires photocopying/distribution via certified mail of permit applications, public hearing announcements, and other notifications to between 200-300 riparian property owners, interested parties and homeowners associations, creation of detailed calculation and appropriate billing to recover administrative costs associated with the handling of each standard work permit application and other similar tasks.

Responsible for the administration of Tangible Property Appraisal Public Hearings including scheduling the TPA Boardroom for public hearings, forwarding of agency announcements soliciting the assignment of a TPA Public Hearing Officer, creation of audio recording of public hearing comments and creation of an accurate transcript of the entire public hearing, ranging from 10-20 pages of verbatim text.

Plans, schedules and organizes audits of gross receipts of fixed base operators and parking operations, including Insurance, Bond and Disadvantaged Business Enterprise requirements. Reads contractual agreements, analyzes data, verifies gross receipts, performs basic assessment of the reliability of computer processed data, determines compliance with fee schedules, and prepares an audit report of material findings and recommendations.

Performs a variety of landscape and vegetation maintenance to include trimming trees, pruning roots, chipping brush and limbs, removing trees and stumps using a variety of hand and power tools such as saws, chippers, and pruners; removes debris and mows roadsides, medians, right-of-ways, and County property using push and riding mowers to maintain roadways and County property in accordance with established standards.

Identifies fingerprints by examining ridge minutiae and noting the relative position that each point of identity holds to one another in each fingerprint, ensuring that this minutiae is identical in both prints before identity is positively established.

Collects and preserves water/wastewater samples following written and verbal direction; maintains chain-of-custody paperwork for sample collection, pickup, and delivery; performs laboratory analysis on collected samples using microscope and laboratory analyzers in conformance with standard methods and procedures; and interprets test results following established guidelines.

DETERMINING THE “ORDER OF IMPORTANCE”

Identifying the relative “order of importance” of the major job duties provides valuable context to the job data that is used in the job evaluation process. While all of the major job duties assigned to a position are “important” to some extent, some of the job duties are usually considerably “more important” to fulfilling the primary purpose or function of the job.

NOTE: It is recommended that the relative “order of importance” of the major job duties be determined before entering any job data in the chart. After the major job duties are properly rank ordered, “copy and

paste” them in the chart in “descending order” with the “most important” major job duty listed in the row identified as Job Duty ID # 1. If you have difficulty in determining the “order of importance” of the major job duties, the following “pair comparison” procedure can be used to simplify the decision making process.

PAIR COMPARISON EXAMPLE

Assume that a classified position has only four “major job duties”. Assign a separate “Job Duty Code Letter” (A, B, C, and D) to represent each of the four major job duties. Draw a simple matrix chart and list the “Job Duty Code Letters” on each of the four rows and columns of the chart as displayed below.

Pair Comparison Chart

	Job Duty A	Job Duty B	Job Duty C	Job Duty D
Job Duty A				
Job Duty B				
Job Duty C				
Job Duty D				

NOTE: The “intersecting boxes” in the four rows and columns of the chart that are assigned the same “Job Duty Code Letter” (shaded black) are not used. The “intersecting boxes” in the bottom left half of the chart (shaded gray) will also not be used in this pair comparison procedure.

To simplify the decision making process, a “pair comparison” procedure involves a direct “one to one” comparison of two major job duties at a time. To begin, compare the relative importance of “Job Duty A” (listed in the first row of the chart) with “Job Duty B” (listed in the second column of the chart), and decide which of these two major job duties is “more important” to fulfilling the primary purpose of the job.

Enter the “Job Duty Code Letter” (A or B) that you assigned to the major job duty that you consider to be “more important” in the box that intersects “Job Duty A” (listed in the first row) and “Job Duty B” (listed in the second column). In this example, “Job Duty A” is considered to be “more important” than “Job Duty B”, so the Job Duty Code Letter “***A***” (in red italics) is entered in the “intersecting box” as displayed below.

Pair Comparison Chart

	Job Duty A	Job Duty B	Job Duty C	Job Duty D
Job Duty A		A		
Job Duty B				
Job Duty C				
Job Duty D				

Next, conduct a “pair comparison” of “Job Duty A” (listed in the first row) with each of the other two major job duties, “Job Duty C” and “Job Duty D”, (listed in the third and fourth columns). Enter the “Job Duty Code Letter” of the major job duty that is considered to be “more important” in each of the intersecting boxes on the chart. In this example, “Job Duty C” is considered to be “more important” than “Job Duty A”, and “Job Duty A” is considered to be “more important” than “Job Duty D” as displayed below.

Pair Comparison Chart

	Job Duty A	Job Duty B	Job Duty C	Job Duty D
Job Duty A		<i>A</i>	<i>C</i>	<i>A</i>
Job Duty B				
Job Duty C				
Job Duty D				

Follow the same “pair comparison” procedure in the second row of the chart by assessing the relative importance of “Job Duty B” (listed in the second row), with “Job Duties C” and then “Job Duty D” (listed in the third and fourth columns). In this example, “Job Duty C” is considered to be “more important” than “Job Duty B”, and “Job Duty B” is “more important” than “Job Duty D”.

To complete the “pair comparison” procedure in the third row of the chart you will compare the relative importance of “Job Duty C” (listed in the third row) with “Job Duty D” (listed in the fourth column). In this example, “Job Duty C” is considered to be “more important” than “Job Duty D” as displayed below.

Pair Comparison Chart

	Job Duty A	Job Duty B	Job Duty C	Job Duty D
Job Duty A		<i>A</i>	<i>C</i>	<i>A</i>
Job Duty B			<i>C</i>	<i>B</i>
Job Duty C				<i>C</i>
Job Duty D				

To identify the relative “order of importance” of all four of the major job duties assigned to this position, add the total number of “Job Duty Code Letters” that are listed in “**red italics**” in the “intersecting boxes” on the chart. In this example, Job Duty A = 2; Job Duty B = 1; Job Duty C = 3; and Job Duty D = 0.

The major job duty that you considered to be “more important” the greatest number of times during all of the pair comparisons is the “most important” major job duty assigned to the position. In this example, the relative “order of importance” of the four major job duties is Job Duty C, A, B, and D.

The major job duty coded “C” would be entered first in the “List of Major Job Duties” chart identified in the first column as “Job Duty ID # 1”. The major job duty coded “A” would be entered in the second row of the chart identified as “Job Duty ID # 2”, and so forth.

ENTERING THE MAJOR JOB DUTIES IN THE CHART

After the “major job duties” assigned to the position have been identified, described, and rank ordered based upon their relative importance, “copy and paste” the major job duty statements in the “List of Major Job Duties” chart in “descending order” with the “most important” major job duty entered first.

When all of the major job duties have been properly entered in “descending order”, the numbers you will enter in the third column of the chart under the heading “Order of Importance” should be identical to the pre-numbered “Job Duty ID #'s” listed in the first column of the chart. If this is not the case, review the list and re-enter the major job duties in the proper “order of importance”.

NOTE: The pre-numbered “Job Duty ID #'s” listed in column 1 of the chart will be used to reference the major job duty in several other sections of the JCQ. For example, each one of the pre-numbered “Job Duty ID #'s” will be “cross reference” with the KSA statements that are entered in the “List of Knowledge, Skills, and Abilities” chart in Section I – C.

DETERMINING THE “ESTIMATED PERCENTAGE” OF WORK TIME

In the fourth column of the “List of Major Job Duties” chart, enter the “estimated percentage” (rounded to the nearest whole percentage) of the total work time the incumbent typically spends performing each of the major job duties. An “approximate” percentage of the total work time is sufficient to provide context to the list of major job duties; however, if you have difficulty in estimating these percentages, the following technique can be useful.

Estimate the “actual” number of work hours (rounded to the nearest hour) that is typically spent performing each of the major job duties during an “established time period” such as an eight (8) hour day, a forty (40) hour work week, a full month, a calendar quarter, a fiscal year, etc.

Convert the “actual” number of hours spent performing each major job duty into a “percentage” by dividing the number of “actual” hours worked performing the major job duty by the “total” number of hours the incumbent is “available to work” performing all of the major job duties during the time period.

For example, if “Job Duty # 1” is performed approximately (8) hours during each forty (40) hour work week, this major job duty would account for 20% of the incumbent’s “total” work time during the work week. (8 hrs. divided by 40 hrs. = 20%)

If “Job Duty # 2” is performed approximately four (4) hours during each bi-weekly (80 hour) payroll period, this major job duty would account for 5% of the employee’s “total” work time during the eighty (80) hour time period. (4 hrs. divided by 80 hrs. = 5%)

NOTE: When the “estimated percentages” of time spent performing each of the major job duties are added together, the “total percentage” of time spent performing all of the major job duties will equal 100%.

IDENTIFYING ANY “NEW” MAJOR JOB DUTIES

When a job evaluation study is conducted it may be necessary to assess the impact of major job duty changes (i.e. additions and/or deletions) that occurred since the position was initially “established” or since the position was last “reclassified” by the Civil Service Office.

The fourth column of the “List of Major Job Duties” chart is used to identify if any of the major job duties listed in the chart are “new” major job duties that have been assigned to the position since it was established or since the position was last reclassified by the Civil Service Office. Mark the box in the fourth column of the chart only if the major job duty is a “new” major job duty.

NOTE: An increase or decrease in the “workload” or “volume of work” performed is not considered to be a “new” major job duty. An increase in the “amount of work” an incumbent fulfills while performing one or more of the “previously assigned” major job duties does not increase the overall “value” of the job.

In other words, the appropriate job classification and pay grade of a position depends on the “level and complexity” of the major job duties and is not based on how much work is performed by an incumbent. Any significant workload changes will typically affect the “estimated percentage” of work time that an incumbent spends performing each of the major job duties assigned to the position.

Additional management information concerning any “new” major job duties assigned to the position, any major job duty deletions, transfers and reassignments, and/or other significant changes to the position are provided by the “first level” manager in Section III - C of the JCQ.

The following example lists and briefly describes four major job duties assigned to an Office Assistant II position. Job duty # 3 is listed as the third most important major job duty assigned to the position, it consumes approximately 10% of the total work time, and is identified as a “new” major job duty.

LIST OF MAJOR JOB DUTIES	ORDER OF IMPORTANCE	% OF TIME	NEW JOB DUTY?
1. Answers and directs calls to the appropriate person; provides information to walk-in customers in an outdoor field office; collects and deposits user fees.	1	40	<input type="checkbox"/>
2. Types documents using proper formats to include memorandums, letters, reports, tables, agendas and statistical data, using Microsoft Office applications.	2	40	<input type="checkbox"/>
3. Verifies time entries and payroll codes using HRIS - SEA (Human Resources Information System - Self-Evident Application); submits to payroll for processing.	3	10	<input checked="" type="checkbox"/>
4. Schedules meetings by locating and securing a meeting facility, coordinating time for attendees, and providing documentation to participants as needed.	4	10	<input type="checkbox"/>
TOTAL PERCENTAGE OF TIME MUST EQUAL 100%		100%	

SECTION I – C KNOWLEDGE, SKILLS, AND ABILITIES

Prior to entering any knowledge, skills, and abilities statements, review the “List of Major Job Duties” chart in Section I – B. Identify the knowledge, skills, and abilities (KSA’s) that are “required” to satisfactorily perform each of the major job duties. At least one major job duty must be cross-referenced with each of the KSA’s identified in the “List of Knowledge, Skills, and Abilities” chart.

“Knowledge” statements are particularly important since they help to define the specific “type” knowledge and “how much” knowledge of a particular subject is required to satisfactorily perform the job. This information assists the Civil Service Office in establishing “minimum qualifications” for job classifications, and is used to develop job related examinations designed to assess whether applicants possess the KSA’s that are required to satisfactorily perform the major job duties assigned to a position.

“Skills” usually require the use of an employee’s hands, feet, or body; so many of the major job duties do not require a skill to perform. “Abilities” includes both the capacity and the skill to perform a major job duty, and may include the physical, mental, financial, or legal power to perform the job. Physical abilities that are “required” to satisfactorily perform the major job duties will also be covered in Section III – C, which is typically completed by the “first-level” manager.

In a separate word document develop “descriptive statements” that identify at least one “knowledge” that is “required” to satisfactorily perform each of the major job duties. If applicable, identify any skills and/or abilities that are “required” to perform a major job duty.

LISTING “REQUIRED” KSA’s

Identify only those KSA’s that are actually “required” to satisfactorily perform the major job duties. Please do not list any KSA’s that are considered to be “desirable”, but are not actually “required” to satisfactorily perform the major job duties.

“Desired” KSA’s may be preferred by agency or department managers, and in many instances “desired” KSA’s are possessed by the “best qualified” applicants for a position who are often selected for employment or promotion. However, “desirable” KSA’s cannot be “required” as a “minimum qualification” that would disqualify applicants who possess the KSA’s that are needed to satisfactorily perform the major job duties.

NOTE: If current employees are satisfactorily performing the major job duties in a “same or similar” position without possessing the “required” a KSA documented in the “List of Knowledge, Skills, and Abilities” chart, this may be considered evidence that the KSA should not be required as a bona-fide “minimum qualification” of the job.

IDENTIFYING THE “LEVEL” OF A KSA

In some instances, an identifiable “level” of a KSA may be “required” to satisfactorily perform a major job duty assigned to a position. However, it is important not to specify an “excessive level” of a KSA that can not be justified as a “minimum qualification” that is required to satisfactorily perform the major job duty.

The relative “level” of a required KSA will often gradually increase with each successive classification in a multi-level job classification series. For example, the required “level” of knowledge of the “principles and practices of accounting” will gradually increase for each of the following job classifications: Accounting Clerk, Accountant I, Accountant III, Accounting Manager, etc. Progressive “levels” of knowledge “required” to perform major job duties are usually identified as follows:

“Some knowledge” indicates that a general or fundamental understanding of a particular subject that is required to satisfactorily perform a major job duty.

“Working knowledge” indicates a greater understanding of a subject that is typically required to become “fully functional” in a mid-level job within a job classification series, including the level of knowledge required to competently perform skilled trades work at the “journeyman level”.

“Considerable knowledge” of a subject requires an advanced level of understanding of a subject that is often acquired through completion of a college degree (or an advanced technical training program), and/or acquired through progressively responsible work experience. This level of knowledge is often required to supervise work activities, train subordinates, and independently perform difficult and complex job duties.

“Extensive knowledge” requires a very advanced level of understanding or mastery of a subject that may be required to perform senior professional or managerial level work of a very difficult and complex nature.

In many instances, a progressive “level” of a particular “skill” or “ability” that is required to satisfactorily perform a major job duty is not actually relevant. For example, an employee may be required to have the “skill” needed to properly operate a specific type of equipment, or must possess the “ability” to effectively communicate using a particular foreign language.

If a particular “level” of skill or ability is required, it can often be identified using a general category such as “entry level”, “intermediate level”, “advanced level”, or “expert level”. Other characteristics of the position such as the “willingness” to perform a major job duty are generally included in an ability statement.

LIST OF KNOWLEDGE, SKILLS, and ABILITIES	RELATED JOB DUTY #
1. Considerable knowledge of MS Word, Excel, Access, Outlook, and HRIS – SEA applications.	2, 3, 4
2. Skill in the use of a computer and an automated cash register.	2, 3, 4,
3. Ability to evaluate HRIS reports and accurately enter payroll information and other financial data.	3
4. Ability and willingness to work outdoors in a subtropical climate under adverse weather conditions.	1

SECTION I – D SUPERVISORY RESPONSIBILITIES

Indicate whether the position has been delegated responsibility to “supervise” any “County employees”. Please do **not** include the coordination or oversight of “non-county” employees such as volunteers, student interns, etc. If the position does **not** supervise any County employees, please proceed to Section I – E.

If the position has been delegated supervisory responsibility as defined below, list the number of full-time, part-time, reduced hours, and temporary County employees (and vacant positions) that are “**directly**” and “**indirectly**” supervised by the incumbent.

“**Direct**” supervision is defined as responsibility for the immediate day-to-day supervision and control of employees who report directly to the incumbent in the position. Direct supervision includes responsibility for assigning and monitoring work, providing guidance and training, **and** for conducting employee job performance evaluations.

“**Indirect**” supervision involves responsibility for the “general oversight” of lower-level employees within the work group who directly report to another “supervisor” who reports directly to the incumbent in this position. **NOTE:** If an incumbent does not “directly” supervise any subordinates who are themselves supervisors over other lower-level employees within the work group, then the incumbent in the position does not have any “indirect” supervisory responsibility.

SECTION I – E TOOLS AND EQUIPMENT USED

List the tools and equipment that are used to perform this job, and relate each to a “Job Duty ID #” listed in Section I - B. Describe any specialized training that is “required” to use the tools and equipment listed in this section. **NOTE:** If an incumbent is assigned responsibility to “**repair**” any equipment, please include this work assignment as a major job duty listed in Section I - B.

SECTION I – F TYPICAL WORK ASSIGNMENTS

Describe “two typical work assignments” that an incumbent fulfills on a **frequent basis** in terms of “**what**” is done, “**how**” it is done, “**why**” it is done, and “**what**” knowledge, skills and abilities (KSA’s) are required to complete the assignments. In many instances completion of a “work assignment” involves performing several major job duties. Describe the typical work assignments using non-technical language, and define any acronyms that are used.

SECTION I – G TYPICAL PROBLEMS RESOLVED

Describe a typical work related problem or issue that the incumbent encounters in this job and explain how it is resolved. Describe how the incumbent becomes aware of the work related problem, the resources that are available to the incumbent, and the process the incumbent uses to resolve the work problem.

Describe how much discretion the incumbent is permitted to exercise to determine the methods to be used, and the level of authority delegated to the incumbent to take action needed to resolve the work problem.

SECTION I – H WORK RELATED CONTACTS

The nature of work related contacts and the organizational level of the employees an incumbent contacts while performing the major job duties is important information considered in the job evaluation process.

List the primary “**internal**” (County agencies / departments) and “**external**” private and public sector organizations that are contacted by the incumbent in this position on a regular basis.

List the primary “**reason**” that each work related contact is required, and identify the “**job title**” or the “**organizational level**” of the individual contacted within each organizations. (i.e. clerical, technical, professional, managerial, or administrative level)

SECTION II

(RESOURCE CONTROL)

SECTION II – A FINANCIAL AUTHORITY

Mark the box indicating whether the incumbent in this position been delegated financial authority to “independently” obligate or spend funds without receiving additional approval from higher level authority.

If financial authority has been delegated, list the “annual” dollar amount (excluding payroll dollars) that the incumbent can independently obligate or spend.

SECTION II – B FACILITIES and/or MATERIALS MANAGED

If this position has been delegated authority to “manage” any major programs or projects, please list the annual budget allocation for all of the major programs or projects managed.

SECTION III

(JCQ REVIEW AND CERTIFICATIONS)

GENERAL INFORMATION

Section III is used in the JCQ review and certification process to identify the employee who provided the job data in Sections I and II of this official document. This section also documents any “comments” provided by the incumbent, immediate supervisor, “first level” manager, department director, and other administrative staff to “correct or clarify” any information in the JCQ.

Section III compiles “additional management information” that is provided by the “first level” manager concerning the position and any requested position classification action. Section III also documents the “electronic or hand-written signatures” of all employees in the JCQ completion and review process certifying that to the best of their knowledge the information they provided in this official document is accurate and complete.

SECTION III – A CERTIFICATION OF INCUMBENT

If the position described in the JCQ is encumbered, Section III – A is to be completed by the incumbent who indicates whether or not they provided the job data in Sections I and II of the JCQ. If they did not, the incumbent indicates whether he/she agrees or disagrees with the information documented in these two major sections. If the incumbent disagrees with any of the job data provided in these two sections they are to provide their comments to correct or clarify the information before signing the document certifying that all of the information they provided in the JCQ is accurate and complete.

Upon completion, the incumbent forwards the JCQ as an e-mail attachment to the immediate supervisor or the next level of agency or department review.

SECTION III – B SUPERVISOR’S COMMENTS AND CERTIFICATION

After reviewing all of the incumbent’s responses in the JCQ the immediate supervisor completes Section III – B indicating whether they agree or disagree with the information documented in Sections I and II. If the immediate supervisor disagrees with any of the job data they will provide their comments to correct or clarify the information before signing the document certifying that all of the information they provided in the JCQ is accurate and complete.

Upon completion, the immediate supervisor forwards the JCQ as an e-mail attachment to the first-level manager above the supervisor or the next level of agency or department review.

SECTION III – C ADDITIONAL MANAGEMENT INFORMATION

The incumbent is typically responsible for completing Sections I and II of the JCQ to document the major job duties assigned to the position and to list the knowledge, skills, and abilities required to perform the job. However, the incumbent is often not the most knowledgeable employee to provide additional information concerning the position including any significant changes that affected the position. For this reason, additional management information concerning the following subjects is to be provided by the “first level” manager in Section III - C.

1. Effective Date of the Action Requested
2. Limited Duration Position
3. FLSA Overtime Category
4. Current and Proposed Organization Charts
5. Educational / Vocational Minimum Requirements
6. Job Related Work Experience
7. Additional Knowledge, Skills, and Abilities
8. KSA’s that are “Not Required” upon “Initial Employment” in a Position
9. Physical Ability Requirements
10. Hazardous Working Conditions
11. Reason for requesting a “Position Classification Action”
12. Job Duty Changes
13. Essential Job Duties

1. EFFECTIVE DATE OF THE ACTION REQUESTED:

The effective date of an approved position classification action is generally the date of the approval letter from the Civil Service Office. However, if circumstances support a different effective date, enter the date that is requested and describe the reason why a different effective date is requested.

NOTE: Civil Service Rules prohibit backdating personnel actions more than 60 calendar days. Please refer to CS Rule 5.7b. for further guidance.

2. LIMITED DURATION POSITION:

If the position is a “limited duration position” (i.e. grant funding, temporary funding, etc.), please list the anticipated expiration date of this position.

3. FLSA OVERTIME CATEGORY:

The administrative determination of the Fair Labor Standards Act (FLSA) “overtime exemption status” (**Exempt** or **Non-exempt**) for each individual “position” is the responsibility of agency or department management. For detailed information concerning FLSA legal criteria used to determine the overtime exemption status of a position, please refer to the U.S. Department of Labor website for FLSA guidance (www.dol.gov/esa/WHD/regs/compliance/fairpay/), or consult an employment attorney for legal advice.

It is important to note that the FLSA overtime exemption status code listed in the Classification and Pay Plan located on the Civil Service Board website (www.hccsb.org) for each “**job classification**” is only to be used as a “**guide**” and is not necessarily applicable for every “**position**” allocated to that job classification. Based upon a review of the specific job duties and responsibilities assigned to the position, and a review of the FLSA overtime exemption criteria, agency or department management staff may determine that the overtime exemption status of the “position” is **not** the same as most positions allocated to that “job classification”.

The “FLSA Exemption Codes” listed in the Classification and Pay Plan, (Y = Exempt), and (N = Non-exempt), indicate whether incumbents in “most” of the positions assigned to that job classification are FLSA “Exempt”, and ineligible to receive overtime compensation (i.e. salaried positions), or that the positions are FLSA “Non-exempt”, requiring the agency or department to pay incumbents overtime compensation at the rate of “time and one-half” for hours worked in excess of 40 hours in a work week.

The four major overtime exemption categories that are typically applicable for FLSA “exempt” positions are “Executive”, “Administrative”, “Professional”, and “Computer Related”, as defined on the Department of Labor website.

Most of the questions included in this section are related to the agency or department management’s determination of the FLSA overtime exemption status that applies to the position, and whether this determination is consistent with the FLSA overtime exemption status provided as a “guide” in the Classification and Pay Plan. If the “overtime exemption status” determination is not consistent with the guide listed in the Classification and Pay Plan, it is advisable to review the basis for the decision to avoid financial liability if non-exempt employees are not properly compensated for overtime hours worked.

4. CURRENT AND PROPOSED ORGANIZATION CHARTS:

A visual display of the organization “before” and “after” approval of a requested position classification change provides valuable information concerning the functional level of the position within the organization, and depicts all of the supervisory reporting relationships of positions within the work group (i.e. department, division, or section, etc.).

Attach an “electronic” or a “paper copy” of the “current” organization chart for the work group that encompasses the position(s) to be evaluated, and a “proposed” organization chart for the same work group that assumes a requested position classification action will be approved by the Civil Service Office.

On both organization charts, identify (i.e. “*highlight*”) the position(s) described in the JCQ, and display all supervisory lines of authority. If the position to be evaluated is a supervisory position, ensure that the number of employees supervised as listed in Section I – D is the same as the number of subordinate positions displayed on the “proposed” organization chart. List the following information for each position displayed on both organization charts using the format in the example below:

Position Number (PN#); Employee ID Number (E#); Job Classification Code Number / Pay Grade;
Job Classification Title; (and bold) the Employee Name; and the “Working Title” of the position.

ORGANIZATIONAL CHART FORMAT

PN# 12345	E# 67890	A1367/AS
GENERAL MANAGER II		
Franklin J. Bloomberg		
Manager, Field Operation		

ORGANIZATIONAL CHART CONSTRUCTION

- Organization charts should be constructed using the box and line format.
- Organization charts should be fit to 8.5 X 11 inch paper, either in portrait or landscape orientation.
- Lines of authority should display all direct supervisory relationships.
- There should be one box for each position, unless you wish to display multiple positions with the same job classification that directly report to the same supervisor.
- Each box on the organization chart should display:

- The HRIS “**Position Number**” preceded with P#. (i.e. P#12345)
 - The HRIS “**Employee Number**” preceded with E#. (i.e. E#99999)
 - The official “**Job Classification Code**” and “**Pay Grade**” as displayed in the Classification and Pay Plan located on the Civil Service Board website. (i.e. A1360/AM)
 - The official “**Job Classification Title**” for both classified and unclassified positions as displayed in the Classification and Pay Plan. (i.e. Program Coordinator; Dir, Water Resource Services, etc.)
 - The “**Incumbent’s Name**” in “bold” type, or if the position is unencumbered, type “Vacant”.
 - The duty or “**Working Title**”, of the position, if applicable, in bold type.
- Blank lines should separate the “employee name” and the “working title” from the other information in the box as displayed in Example 1 below.

EXAMPLE 1

P#12345	E#67890	C4772/CC
Utilities Maint. Worker Trainee		
Alexander J. Vandenberg		
Lift Station Maint. Wkr Trainee		

EXAMPLE 2

P#12345	E#67890	C4772/CC
UTILITIES MAINT WKR TRAINEE		
Alexander J. Vandenberg		
Lift Station Maint. Wkr Trainee		
P#34567	E#89012	
Johnny V. Preston		
P#45678	E#34567	
Juan Rivera		

- If several positions assigned to the same job classification report to the same supervisor, the organization chart could be constructed with boxes as shown in example 2 to save space. Include the additional position numbers, employee numbers, and bold the incumbent’s names, or if applicable, enter “Vacant”.
- A dotted or dashed line should be used to display “coordinating” or “advisory” relationships.
- Large organizations should provide several separate organization charts that display one or more subdivisions so that the information contained in each organization chart is legible.
- One organization chart should display the first and second levels of the organization at the management level, and subsequent organization charts should display all positions within each major division. This may require several separate organization charts if the major division have several large sections.

5. EDUCATIONAL / VOCATIONAL MINIMUM REQUIREMENTS:

To ensure that all applicants and employees possess the KSA’s that are “required” to “satisfactorily” perform the major job duties assigned to a position, “minimum qualifications” are established that specify completion of a particular “level of education”, or completion of a specialized “vocational training program”. Please do not list a “desired” or “preferred” level of education or vocational training that is not the minimum level required to satisfactorily perform the job.

Please mark the box in the chart that identifies the closest level of education and/or vocational training that you believe should be “required” as a “minimum qualification” of this position. Explain why this “minimum qualification” should be required by linking the required KSA’s to the level of education / vocational training that you believe is required to satisfactorily perform the major job duties assigned to this position.

In some instances, a Federal, State, or County agency requires a particular certification, license, or professional designation that an incumbent is “required” to possess to legally perform the major job duties assigned to the position. If applicable, list these mandatory job requirements, and identify the governmental agency that has established and enforces this job requirement.

6. JOB RELATED WORK EXPERIENCE:

Most classified positions require a “minimum” amount of “job related work experience” that is considered necessary for an applicant or employee to acquire all of the KSA’s that are required to “satisfactorily” perform the major job duties assigned to a position. In some instances, however, “entry level” positions

may not require any job related work experience when the KSA's can be acquired through on-the-job training during the probationary period.

For most positions, a particular "type" of work experience is required to develop the specialized KSA's needed to satisfactorily perform the major job duties assigned to the position. In some cases, a particular "level" of work experience may be required such as "supervisory experience", or work experience at a "professional level".

Please do not identify a desired or preferred "type" or "level" of job related work experience that cannot be justified as the "minimum" experience that is required to "satisfactorily" perform the major job duties. Mark the box in the chart that identifies the level of job related work experience that you believe should be established as a "minimum qualification" of this position. Explain why this "minimum qualification" should be required by linking the required KSA's to the "type" and "level" of work experience that you believe is required to "satisfactorily" perform all of the major job duties.

7. ADDITIONAL REQUIRED KNOWLEDGE, SKILLS, AND ABILITIES:

Please review the KSA's listed by incumbent and/or the immediate supervisor in Section I – C and identify any "other KSA's" that you believe are also "required" to "satisfactorily" perform the job. Do not list any "desired" KSA's that are not required to satisfactorily perform the major job duties. Relate each additional KSA to a major job duty identified in Section I - B.

8. KSA'S THAT ARE "NOT REQUIRED" UPON "INITIAL EMPLOYMENT" IN THE POSITION:

In most instances, KSA's are "required" upon "initial" employment in a position. KSA's are used to establish minimum qualification for job classifications. Qualifying examinations are developed and administered by the Civil Service Office to determine whether applicants possess the KSA's that are "required" to perform the major job duties assigned to a position.

However, in some instances one or more of the KSA's that are "required" to satisfactorily perform the job can be acquired during the "probationary period" and are not actually required upon "initial employment" in the position. For example, "working knowledge of agency or department policies" may be quite important for an incumbent to satisfactorily perform the major job duties. However, because this specialized knowledge can be learned by an incumbent during the probationary period, this particular KSA should not be included in a qualifying examination for "initial employment" in the position.

To assist the Civil Service Office in developing examinations that assess KSA's that are required upon initial employment in a position, please identify any KSA's that are not required upon initial employment in the position and can be acquired during the probationary period.

9. PHYSICAL ABILITY REQUIREMENTS:

List any physical abilities that are "required" to satisfactorily perform the major job duties currently assigned to this position. Provide an example describing why each of the physical abilities listed is required to satisfactorily perform the job, and relate the physical ability to one or more "Major Job Duty ID #'s" listed in Section I - B.

For example, for safety reasons electricians assigned to perform potentially dangerous electrical maintenance and repair work are required to have the physical ability to visually observe and differentiate between "red" and "green" colored wires. These skilled trade employees are "required" to have vision with "normal color perception".

The following is a partial list of physical abilities this is only provided as a guide.

- Vision, (normal or correctable to 20/20 vision)
- Visual Acuity (normal color and depth perception)
- Hearing (normal with or without use of a hearing aide)
- Speaking (communicating verbally)
- Routinely lifting up to 20 lbs (or other weight). Provide an example.
- Routinely walking (or moving oneself) over uneven surfaces. Provide an example.
- Routinely walking (or moving oneself) 1 mile (or other distance) each work day. Provide an example.
- Routinely climbing (or elevating oneself) up steps or a ladder.
- Routinely kneeling for lengthy periods of time.
- Routinely standing for lengthy periods of time.
- Routinely stooping or crouching for lengthy periods of time.
- Routinely reaching, grasping, or pulling objects.
- Working in non-heated / non-air conditioned buildings for lengthy periods of time.
- Working outdoors for lengthy periods of time. Identify the average number of hours per day.

10. HAZARDOUS WORKING CONDITIONS:

Identify any “hazardous working conditions” and/or “hazardous materials” that an incumbent in this position “regularly” comes into contact with, and describe any special “safety training” and/or “safety apparatus” required to perform this job.

11. REASON FOR REQUESTING A POSITION CLASSIFICATION ACTION:

To assist the Civil Service Office in job evaluation process, please summarize the basic reason for submitting this JCQ, and if applicable, why a position classification action is being requested.

12. JOB DUTY CHANGES:

The assessment of changes to the major job duties assigned to a position (i.e. new and/or deleted major job duties) is important in the job evaluation process used to determine the appropriate job classification and pay grade of the position.

NOTE: If this requested position classification action involves the “total restructuring” of a “vacant” position that includes assignment of “completely different major job duties and responsibilities”, completion of this section will not be required and you may proceed to the next subject area.

However, if only “some” of the major job duties have changed since the position was established or since it was last reclassified by the Civil Service Office, please answer all of the questions in this section concerning the nature and extent of the major job duty changes.

Major Job Duty “Deletions” Several questions in this section concern possible major job duty “deletions” involving major job duties that have been completely “eliminated” and are no longer performed by anyone within the organization. (i.e. elimination of a work program) Other questions concern major job duties that have been “transferred and reassigned” to other positions within the organization. If major job duties have been “transferred and reassigned” to other positions, please list the “job classification title” and the “position number” of the position(s) the major job duties were reassigned to.

Major Job Duty “Additions” Some questions in this section concern any “new” major job duties that have been assigned to this position since it was established, or since it was last reclassified by the Civil Service Office. If applicable, identify “when” each “new” job duty was assigned to this position, and “where” the “new” job duty came from, or “originated”.

For example, new job duty #1 originated with a Federal grant effective October 1st; new job duty #2 resulted from the expansion of an existing work program on January 1st; new job duty #3 was “transferred and reassigned” to this position from position # 99999 due to a department reorganization on October 1st, etc.

If any of the “new” major job duties have been “transferred and reassigned” to this position from another position, the Civil Service Office is also interested in determining whether this “reassignment” affected the appropriate job classification of the other position(s) that are no longer responsible for performing the major job duty. **NOTE:** Job duty “reassignments” may require completion of additional JCQ’s to assess the impact of any significant changes on the job classification of other positions within the organization.

Assessment of Major Job Duty Changes To properly assess the “impact” of major job duty changes the Civil Service Office evaluates information concerning the relative “difficulty and complexity” of each “new” major job duty compared to the group of “other” major job duties that are assigned to the position. The first-level manager indicates whether each “new” major job duty” is considered to be one of the following:

- (1) “less” difficult and complex to perform compared to the group of other assigned major job duties;
- (2) “generally equivalent” in difficulty and complexity compared to the group of other major job duties;
- (3) “more” difficult and complex compared to the group of other assigned major job duties;

For each “new” major job duty that the first-level manager considers to be “more difficult and complex” to perform compared to the group of “other” job duties assigned to this position, the manager will explain the basis for making this assessment.

13. ESSENTIAL JOB DUTIES:

The designation of the “essential job duties” of the position by an agency or department for purposes of compliance with the Americans with Disabilities Act (ADA) is optional, and completion of the section is not required to conduct a job evaluation study to determine an appropriate job classification and pay grade.

However, agencies and departments are encouraged to designate the “essential job duties” of each position within their organization to facilitate compliance with the Americans with Disabilities Act (ADA). For further information concerning “essential job duties”, refer to the ADA website (www.ada.gov) or consult an employment attorney for legal advice.

14. MANAGER’S JCQ CHECKLIST:

The first-level manager is responsible for confirming that all of the following actions have been completed prior to signing the JCQ and forwarding this document to the next level of agency or department review.

- A. Reviewed the job data documented in the JCQ to ensure that all of the required information has been provided by the incumbent and/or the immediate supervisor.
- B. Completed Section III – C documenting additional management information concerning the position and summarizing the basis for submitting the JCQ to the Civil Service Office.
- C. Provided comments in Section III - D to correct or clarify the job data in the document prior to signing the JCQ certifying that all of the information is accurate and complete.
- D. Provided copies of a “current” and a “proposed” organization chart for the division, section, or work group to be forwarded with the JCQ to the next level of review within the agency or department.
- E. Notified any incumbent(s) in the position(s) to up-date their on-line job applications to facilitate a Civil Service Office determination concerning whether the incumbent(s) meet all of the minimum qualifications required for the “proposed” job classification.

NOTE: Incomplete JCQ’s and other documents submitted to the Civil Service Office will be returned without action.

SECTION III – D MANAGER’S COMMENTS AND CERTIFICATION

After reviewing all of the responses in the JCQ, the first-level manager above the immediate supervisor completes Section III – D indicating whether they agree or disagree with the information in the document. If the manager “disagrees” with any of the job data they are to provide their comments to correct or clarify the information before signing the document certifying that all of the information they provided in the JCQ is accurate and complete.

Upon completion, the manager forwards the JCQ as an e-mail attachment to the department director or the next level of agency or department review.

SECTION III – E DEPARTMENT DIRECTOR’S COMMENTS AND CERTIFICATION

After reviewing the responses documented in the JCQ the department director completes Section III – E indicating whether they agree or disagree with the information provided in the document. If the department director “disagrees” with any of the job data they are to provide their comments to correct or clarify the information before signing the document certifying that all of the information they provided in the JCQ is accurate and complete.

Upon completion, the department director forwards the JCQ as an e-mail attachment to the next level of agency or department review.

SECTION III – F AGENCY HEAD / APPOINTING AUTHORITY OR DESIGNATED REP. COMMENTS AND CERTIFICATION

EXECUTIVE REVIEW AND APPROVAL

After reviewing all of the responses documented in the JCQ, the agency head, appointing authority or designated representative completes Section III – F indicating whether they agree or disagree with the information provided in the JCQ. If they “disagree” with any of the job data they are to provide their comments to correct or clarify the information documented in the JCQ.

The executive review and approval of the JCQ includes assessing any “new” major job duties listed in Section I – B and further described in Section III – C (12) that may have been assigned to this position since it was established, or since the position was last reclassified by the Civil Service Office.

If it is determined that any of the assigned major job duties are “not appropriate” for this position, these job duties may be “transferred and reassigned” to other positions within the agency or department that are properly classified to perform the job duties. This administrative action may eliminate the need to submit a request for a position classification action.

If after reviewing the JCQ they agree that all of the “major job duties” currently assigned to this position are required to efficiently meet the needs of the organization, they will sign the document in the certification section and forward the JCQ to the Civil Service Office for review.

Providing the JCQ and other required documents are properly completed, the Civil Service Office conducts a job evaluation to determine the job classification and pay grade of the position, and typically notifies the agency or department head of the determination within ten working days.

