

# **Job Inventory Worksheet**

## **UCPEA Town Hall Presentation**

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Department of Human Resources

# Job Classification System

**The University has agreed with UCPEA to revise and update the current classification system**

*Why is this important?*

To employ a system that is responsive to the changing needs of the University and the complex work environment we function in.

*What will this system do?*

This system is a new way to manage our professional positions from a classification standpoint through updated job families, job series, and job descriptions.

*Why now?*

Moving forward with this initiative is a result of the new contractual provisions under Art. 31, which speaks to the system being in place for the summer of 2018.

# Job Classification System

## *Phases*

<b>Phase 1</b> <b>Fall 2017/Winter 2018</b>	Information Gathering and Analysis
<b>Phase 2</b> <b>Spring 2018</b>	Level Confirmation, Job Family, Series, Description and Salary Schedule Development
<b>Phase 3</b> <b>Summer 2018</b>	Conversion

# Job Inventory Worksheet

**Today's Goal:** Guide employees through the completion of the Job Inventory Worksheet

- The information provided on the JIW will play a key role in the design of the classification system
- The purpose of the JIW is to collect information regarding 5 aspects of your job including:
  - General Role
  - Education and Experience
  - Independence and Decision-Making
  - Complexity and Problem Solving
  - Scope of Measurable Effect

# Worksheet Timeline

12/20/17

01/19/18

02/09/18

**1** Complete a Job Inventory Worksheet and send to supervisor by **Wednesday, December 20<sup>th</sup>**

**2** Supervisors review employees' JIW and send to first level out of bargaining units by **Friday, January 19<sup>th</sup>**

**3** Completed worksheets due to Human Resources by **Friday, February 9<sup>th</sup>**

# Employee Instructions

- Please read all 5 sections carefully and enter your responses
- Save the file as **YourUCPJobTitle.YourLastName.YourFirstName.JIW.doc**
  - If you are completing the form as a group, save the file as
    - **YourUCPJobTitle.Multiple.JIW.doc**
    - Make sure to include all employees' first and last names in the Your Name section on the first page of the form
  - Save in Microsoft Word (.doc) format
- Email your completed worksheets to your supervisor no later than **Wednesday, December 20, 2017**

# Primary Goal of Your Job

## Your Duties and Responsibilities

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### A. Primary Goal of Your Job

In one or two sentences, briefly describe the primary goal or purpose of your job.

**NOTE:** Please do not list all of your duties and responsibilities here. The next page will give you space to provide more details.



*Example: To assist students applying for admission to the university and provide advice and information on program requirements and procedures.*



- In 1-2 sentences, provide a high level overview of the primary purpose of the position
- Keep in mind the next page will give you space to elaborate in more detail about the duties and responsibilities

# Essential Duties and Responsibilities

- List between 5 and 10 primary job duties and responsibilities
- Focus on key responsibilities critical to the position and avoid including minor or occasional tasks
- Describe the position as it is being performed today and not how it was in the past, or will be in the future
- Begin each sentence with a present-tense action verb

## B. Essential Duties and Responsibilities

Please describe the **most important** essential job duties and responsibilities of your job. Start with the duty or responsibility that takes the **greatest portion** of your time each year, followed by duties that take **at least 10%** of your time throughout the year.

Describe your actual current duties, even if they differ from your current job description.

*Example: Assist library patrons by locating materials, delivering information, answering ready-reference questions.*

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

Use this space for additional comments or notes, if you have any.



# Supervisory and Work Leadership Responsibilities

- Select Yes or No based on if you...
  - Are a Team Lead or a Project Lead
  - Supervise students
  - Have formal supervisory responsibilities for other UConn employees
- Include the Job Title of employees you supervise, their name (or multiple names under the same title), number of positions and indicate if they are full-time or part-time

## C. Supervisory and Work Leadership Responsibilities

<b>Are you a Team Lead or Project Lead?</b>	Choose an item.
<i>If yes, what teams and/or projects do you lead?</i>	
<input type="text"/>	

<b>Do you supervise students?</b>	Choose an item.
<i>If yes, approximately how many students do you supervise per year?</i>	
<input type="text"/>	

<b>Do you have formal supervisory responsibilities for any other UConn employees?</b>	Choose an item.
<i>You have formal supervisory responsibilities if you are responsible for signing performance reviews.</i>	

If Yes, indicate the titles, names and number of positions that you supervise.

Job Title	Employee Name(s) (if the position is filled)	# of Positions (filled and vacant)	
		Full-Time	Part-Time
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>TOTAL</b>		<input type="text"/>	<input type="text"/>

<b>Use this space for additional comments or notes, if you have any.</b>
<input type="text"/>

# Interactions with Individuals

## *Within the University*

### **D. Interactions with Individuals Within the University**

Please provide some examples of the kind of interactions you have with individuals that are part of the University (faculty, administrators, staff, students, etc.) on a regular basis to accomplish your job.

	<b>Titles/Roles of Individuals</b>	<input type="text"/>
1	<b>Types of Interactions (see below):</b>	A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>
	<b>Notes/Comments (optional)</b>	<input type="text"/>

- A. Instruct and Explain** – Give and/or receive instructions, assistance, clarification, explanation such as describing rules, procedures, options, etc.
- B. Collaborate, Problem Solve, Advise** – Work together to exchange ideas, resolve complicated issues or situations, such as academic counseling or advising, providing direction and guidance, handling personnel matters, etc.
- C. Negotiate, Influence, Persuade, Facilitate, Coach** – Gain support for ideas or projects; seek to influence outcomes on matters of significance; mediate between contending individuals; sell, promote, or negotiate
- D. Lead and Manage** – Lead others toward achieving missions, strategies and visions; seek out and build relationships with individuals who are significant to the continuation of the program, school, or college; communicate decisions, directions, and priorities

# Interactions with Individuals

## *Outside of the University*

**E. Interactions with Individuals Outside the University**

<b>Do you regularly interact with individuals outside the University to do your job?</b> In other words, do your job duties require you to work with individuals who are not UConn faculty, administrators, staff, or students?		Yes <input type="checkbox"/>	No <input type="checkbox"/>
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If Yes, please provide examples of the types of individuals and organizations you interact with on a regular basis to accomplish your job's primary goals.

1	Organization/Entity	<input type="text"/>
	Titles/Roles of Individuals	<input type="text"/>
	Type of Interaction (see below):	A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>

- A. Instruct and Explain** – Give and/or receive instructions, explanations such as describing rules, procedures, options, etc.
- B. Collaborate, Problem Solve, Advise** – Work together to exchange ideas, resolve complicated issues or situations, such as academic counseling or advising, providing direction and guidance, etc.
- C. Negotiate, Influence, Persuade, Facilitate, Coach** – Gain support for ideas or projects; seek to influence outcomes on matters of significance; mediate between contending individuals; sell, promote, or negotiate
- D. Build and Manage Relationships** – Serve as spokesperson for a program, school, or college; seek out and build relationships with individuals who are significant to the continuation of the program, school, or college; interact with the press or media

**Consider the types of interactions you have and what you seek to accomplish by those interactions**

# Additional Information

**Please tell us anything else you think we should know about your position.  
(Optional)**



Thank you for taking the time to tell us about your job!

Please save the file as **YourUCPJobTitle.YourLastName.YourFirstName.JIW.docx**

For example, if your name is *Bob Smith* and your job UCP title is University Librarian 3, save the file as **University Librarian 3.Smith.Bob.JIW.docx**.

Email your completed worksheet to your supervisor no later than

**Wednesday, December 20, 2017.**

*By submitting this job inventory worksheet, I attest that the information provided by me is true and accurate.*

# Worksheet Dos and Don'ts

## *Employee*

### **DO**

- Write clearly and concisely, using a factual and objective style
- Focus on key responsibilities critical to the position
- Include explanations telling how, why, where or how often to add meaning
- Begin each sentence with a present-tense action verb

### **DO NOT**

- Copy and paste from existing job specifications which may be overgeneralized and outdated
- Write the JIW as a manual on how to do your job
- Include unnecessary details to the duties performed
- Refer to former or future duties and responsibilities

# Supervisor Instructions

Please review employee responses and when applicable, include comments in the *Supervisor Comments* segment at the end of each section

SUPERVISOR COMMENTS (if you have any)

We encourage you to share your comments with the employee

Please do not edit or change the employee's answers or make comments regarding the employee's performance or personal capabilities

# Getting Started

- **Separate the employee from the job**
  - Imagine you are re-hiring for the position and need to describe the position for a new search
    - What are the qualifications required to successfully perform the job?
    - What knowledge, skills and abilities are expected of the new incumbent?
    - What levels of supervision and decision-making should he or she expect from the position?

# Supervisor's Review Section

- Please indicate the type of
  - Education
  - Experience
  - Certifications/LicensesRequired or preferred for this job
- Do not simply list the qualifications of the current employee

## Supervisor's Review Section

To be completed by the immediate supervisor of the individual(s) who completed the worksheet.

Your Name:	<input type="text"/>
Your Title:	<input type="text"/>

### A. Qualifications

Please indicate the type of education, experience, and certifications/licenses you think should be required and preferred for this job.

**Required** qualifications are those a candidate must have to be considered for the position.

**Preferred** qualifications are those that are good to have, but not necessary.

#### Minimum Required Qualifications

<b>Required Education Level:</b>	<input type="text" value="Choose an item."/>
<i>Indicate required major, field, or discipline, if applicable</i>	
<input type="text"/>	
<b>Required Years of Experience:</b>	<input type="text" value="Choose an item."/>
<i>Indicate type of experience, if applicable</i>	
<input type="text"/>	
<b>Can additional experience substitute for the required education?</b>	
Yes <input type="checkbox"/> No <input type="checkbox"/>	
<b>Required Certifications or Licenses:</b>	
<input type="text"/>	

#### Preferred Qualifications (optional)

<b>Preferred Education Level:</b>	<input type="text" value="Choose an item."/>
<i>Indicate preferred major, field, or discipline, if applicable</i>	
<input type="text"/>	
<b>Preferred Years of Experience:</b>	<input type="text" value="Choose an item."/>
<i>Indicate type of experience, if applicable</i>	
<input type="text"/>	
<b>Preferred Certifications or Licenses:</b>	
<input type="text"/>	



# Competencies

- Please indicate the type of **Knowledge, Skills and Abilities** required for the job

**Knowledge**: The textbook understanding, information gained from education

**Skills**: Capabilities or proficiencies learned through experience

**Abilities**: Innate capabilities that you bring to a particular task or job

<b>B. Competencies</b>
<b>What <u>knowledge, skills, and abilities</u> are needed to be successful in the job?</b>
<b>Knowledge</b>
<i>Examples:</i> Knowledge of the principles and practices of library science and information services Knowledge of federal, state, and local tax regulations Reading knowledge of at least one foreign language
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<b>Skills</b>
<i>Examples:</i> Producing reports and analyses in clear and concise formats Developing, testing, and implementing computer programs Web design skills including HTML and CSS
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<b>Abilities</b>
<i>Examples:</i> Ability to supervise, counsel and evaluate staff Ability to keep complex records, to assemble and organize data, and prepare reports from such records Ability to work independently with minimal supervision and under stressful conditions
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<b>Notes or Comments (Optional)</b>
<input type="text"/>

# Level of Supervision

- Select the item corresponding to the level of supervision that the employee in this position typically receives
- Prior to selecting, review all options starting with item A
- While reviewing, keep in mind A is a base option and each level builds from there
- *Consider:* What aspects of the employee's work can be modified independently and what aspects would need to be reviewed by you prior to modification?

## C. Level of Supervision

Select the level of supervision that employee(s) in this position typically receive (use the drop down menu in the far right column).

Supervision Received		
A	<ul style="list-style-type: none"> <li>• Employees receive some instructions with respect to details of most work assignments</li> <li>• Employees determine the process of how work is to be done based on precedent, practices, and existing policy at the unit/office level</li> <li>• Progress/outcomes are reviewed for consistency with instructions and established procedures</li> </ul>	Choose an item.
B	<ul style="list-style-type: none"> <li>• Employees are sufficiently experienced to handle most work situations within established practice and procedures</li> <li>• Employees are guided by general procedures and professional norms, with periodic checks on accuracy, quality and timeliness of outcomes</li> <li>• Employees are expected to independently develop how their work is to be done based on precedent, practices and existing policy at the office and department levels</li> <li>• Employees possess the latitude to adjust the processes or methods to effectively and efficiently manage their work assignments</li> </ul>	
C	<ul style="list-style-type: none"> <li>• Employees have considerable freedom from technical and administrative oversight while the work is in progress</li> <li>• Supervision only generally occurs when there are repeat problems or missed deadlines</li> <li>• Employees are expected to define standard work tasks within departmental policies, practices, and procedures to achieve outcomes</li> <li>• Employees are expected to handle a variety of situations that are cyclical in character, occasionally complex in nature requiring the application of general departmental guidelines to develop resolutions outside the standard practice</li> </ul>	
D	<ul style="list-style-type: none"> <li>• Employees are free to plan and carry out all phases of work assignments</li> <li>• Employees are given the latitude to make decisions on projects that he/ she is accountable for delivering on</li> <li>• Employee's work assignments are defined as less reoccurring or cyclical tasks, and primarily consists of development or refinement of programmatic or administrative objectives</li> <li>• Decisions should involve selecting an approach from among alternatives, timing when certain tasks should be performed, determining how to best use available resources, and other similar choices</li> </ul>	
E	<ul style="list-style-type: none"> <li>• Employees are free to plan and carry out all phases of work assignments, which include the oversight of staff</li> <li>• Employees have the latitude to make daily operational decisions</li> <li>• Given an understanding of best practices and the way similar units run elsewhere, is able to convincingly recommend capital and process improvements to the area</li> <li>• Employee's work decisions are driven by departmental policy and procedures</li> <li>• Seeks supervisory approvals when significant changes to process steps are considered and additional resources for task completion are required</li> </ul>	
F	<ul style="list-style-type: none"> <li>• Employees are generally responsible for keeping departmental processes moving in a productive direction, with the autonomy to alter the process for efficiency and to achieve a revised outcome from leadership</li> <li>• Seeks assistance only when highly difficult troubles arise or when confronted with problems of considerable material or political consequence</li> </ul>	
G	<ul style="list-style-type: none"> <li>• Employees work under the general direction, subject to supervisory guidance and review</li> <li>• Supervisors provide direction for matters of policy development and coordination, intermediate and long range planning, budgetary and human resources based matters</li> <li>• Work is focused on and regulated by specific divisional goals and milestones</li> <li>• Generally can act based on own judgment as long as actions adhere to division policy and operating procedures, and remain focused on the division and departmental objectives</li> <li>• Seeks assistance only when unique situations arise, coupled with financial impact to the division and political consequence</li> </ul>	

### Notes or Comments (Optional)

# Problem Solving and Decision Making

- Select the item that most closely describes the types of problem solving and decision making involved in this position
- Prior to selecting, review all options starting with item A
- While reviewing, keep in mind A is a base option and each level builds from there
- *Consider:* What are the typical situations dealt with by this position? Are there examples of situations that were unusual? If so, how often do these situations come about?

## D. Problem Solving and Decision Making

Select the statement that most closely describes the types of problem solving and decision making involved in this position.

Problem Solving and Decision Making		
A	<ul style="list-style-type: none"> <li>• Problems tend to be of limited scope and complexity</li> <li>• Resolutions are typically generated by utilizing existing procedures or practice</li> <li>• Generally, problems can be quickly and relatively easily resolved</li> </ul>	Choose an item.
B	<ul style="list-style-type: none"> <li>• Finds solutions to modestly technical or operational problems</li> <li>• Solutions generally can be resolved using conventional or standard procedures</li> <li>• Most of the obstacles, issues or concerns can be handled with established practice and policy</li> </ul>	
C	<ul style="list-style-type: none"> <li>• Issues are varied</li> <li>• Problems tend to be technical or programmatic in nature and are solvable through deep technical know-how and imaginative workarounds</li> <li>• Most of the obstacles, issues or concerns encountered require considering alternative practice or policy interpretation</li> </ul>	
D	<ul style="list-style-type: none"> <li>• Problems are not amenable to strict technical resolution, requiring innovative thinking for resolution</li> <li>• Problem resolution and project completion involve substantial planning and scheduling within the department in order to obtain and align resources when and where needed</li> </ul>	
E	<ul style="list-style-type: none"> <li>• Problems are readily identified but cannot be understood and fixed in simple cause-effect terms</li> <li>• Variables affecting the problem are generally known</li> <li>• Problems require integrative solutions such as how technologies, processes, resources, and people all fit together</li> <li>• Incumbents understand the smallest details of a circumscribed area</li> </ul>	
F	<ul style="list-style-type: none"> <li>• Problems are hard to identify and are sufficiently difficult that they cannot be solved using existing departmental practices and procedures</li> <li>• Problems require response/adaptation to changing conditions or circumstances, necessitating enterprise and new approaches - Problem resolution should frequently require collaboration and coordination with units internal to the division, with occasional collaboration and coordination outside the division</li> <li>• Choices for problem resolution typically remain within the authority of the division, requiring limited external validation</li> </ul>	
G	<ul style="list-style-type: none"> <li>• Problems are unique and unexpected, since subordinate staff would be handling day to day problems</li> <li>• Challenges for problems arise due to the lack of precedent or policy at a University level, requiring incumbents to develop new policy for approval and conceptualizing an implementation plan for new procedures or processes as a result of new policy</li> <li>- Due to the lack of precedent, problem resolution is difficult to identify</li> <li>- Adeptness in discipline and well-formed concept of excellence allows incumbent to "tear apart" processes, question assumptions, etc. in order to identify problems and get to the heart of an issue</li> <li>- Problem resolution should frequently require collaboration and coordination with units both internal and external to the division</li> </ul>	

### Notes or Comments (Optional)



# Additional Information

**Please tell us anything else you think we should know about this position.  
(Optional)**



Thank you!

We encourage you to share your comments and notes with the employee(s) who completed this worksheet.

Please send the completed worksheet to the person who is the **1<sup>st</sup> level out of the bargaining units** in your department/office/school no later than **Friday, January 19, 2018.**

If you are the 1<sup>st</sup> level outside the bargaining units, please send the completed worksheet to Human Resources at [workforce@uconn.edu](mailto:workforce@uconn.edu).

*By submitting this Job Inventory Worksheet, I validate the information reviewed and provided by me is accurate to the best of my knowledge.*

# Worksheet Dos and Don'ts

## *Supervisor*

### **DO**

- Separate the employee in the position from the position itself
- Keep perspective in your unit, focus on the position and its function
- Share your notes and comments with employees

### **DO NOT**

- Make edits or changes to employee's responses
- Discuss the employee's performance
- Include the current employee's qualifications as requirements for the job
- Include minor or occasional tasks

# Resources

**Website:**

Look out for [hr.uconn.edu/ucpea-classification/](https://hr.uconn.edu/ucpea-classification/) going live next week!

**Contact:**

HR Workforce Solutions team via [workforce@uconn.edu](mailto:workforce@uconn.edu)

*Thank you for your support in developing  
the Job Classification System*

**QUESTIONS?**