

PAT PDQ Supplement

Since you have indicated that you are responsible for the work of one or more persons, please complete this Supplement, attach it to the Position Description Questionnaire, and return both to your immediate supervisor.

This Supplement will be a principal means of determining whether, and how, your position is appropriately classified as an Administrative, Managerial or Supervisory (AMS) job. Information provided will enable an analysis of your position in terms of the following areas:

- I. Performance of Other People
- II. Commitments
- III. Equipment, Assets, Money, Records, and Reports
- IV. Tangible Results, Projects or Programs
- V. Education and Experience

This Supplement consists of a listing of the five areas: under each of these areas are a number of factors, which may be simply completed by (1) checking off the statement that most completely and accurately describes that particular aspect of your job; and (2) completing several items which ask for additional information about your job.

Your immediate supervisor will review the information you provide. It is possible for a supervisor to suggest changes or make comments on the job description form.

Remember, check the statement under each factor which most completely and accurately describes that aspect of your job. Also, make the additional information you provide about your job as concise as possible.

S1 stands for Supplement Item 1, etc.

AREA I Performance of Other People - measures the responsibility vested in administrative, supervisory and managerial positions for the timely, accurate and coordinated efforts of others which are necessary to the effective provision of services to the institution.

FACTOR A

S1 Number of people supervised, directly and indirectly, including persons supervised by intermediate levels of management. Count Student and Non-Status Employees as FTE's, i.e., one person at 50% time and two people working 10 hours each = one full-time.

Check one: _____ None
 _____ 1 or 2
 _____ 3 - 10
 _____ 11 - 25
 _____ 26 - 100
 _____ Over 100

S2 Complete the following relative to Supervision exercised.

- a. Percentage of time spent on supervision and related duties: _____ %
b. Number and titles of positions reporting directly to you:

Number of Positions	Job Titles
_____	_____
_____	_____
_____	_____
_____	_____

S3 To what extent do you have authority to hire, fire, train and discipline your subordinates? Please give example.

S4 To what extent do you have authority to restructure jobs and realign work units under your supervision? Please give example.

FACTOR B

S5 Responsibility for directing the work of others.

- Check one: _____ None
_____ Schedule, assign and review the work of others in compliance with specific instructions
_____ Direct the work of others in accordance with general instructions
_____ Provide general instructions and assign responsibility for specific results, based upon established guidelines
_____ Provide guidelines to others, based upon broad responsibility for overall results
_____ Assign overall responsibilities, goals and objectives

FACTOR C

S6 Diversity in nature of work performed by subordinates and degrees of responsibilities vested in the individuals supervised.

- Check one: _____ Not applicable
_____ Routine, relatively similar jobs of a uniform level of responsibility in which work content is stable
_____ Limited variety of fairly routine jobs having infrequent changes in work content, but having dissimilar levels of responsibility

- A variety of routine and non-routine jobs with dissimilar levels of responsibility, subject to occasional but predictable changes in work content and scope to meet cyclical demands or peak period considerations
- A variety of mostly non-routine and unrelated jobs with widely varying level of responsibility, which are subject to continuing fluctuation of work assigned in response to ongoing operational needs of the organization, which may be unpredictable in nature

FACTOR D

S7 Diversity in background required for effective performance in subordinate positions.

- Check one:
- Not applicable
 - 2 different kinds of expertise
 - 3 different kinds of expertise
 - 3 different kinds of expertise, including one requiring post-high school
 - 3 different kinds of expertise, including one requiring formal, post-high school education equivalent to a baccalaureate degree
 - 4 different kinds of expertise, including either 2 requiring formal post-high school education at the baccalaureate level or 1 at the post-baccalaureate level
 - 4 different kinds of expertise, which are predominantly of a scientific, managerial or administrative nature and which customarily require completion of a baccalaureate or master's degree in a specific field

FACTOR E

S8 Extent of your involvement in coordinating work between subordinates.

- Check one:
- Not applicable
 - Coordination needs are minimal. Established procedures sufficient to assure all continuity required under normal conditions
 - Occasional supervisory direction required due to variations in deadlines, need to create ad hoc project teams, or periodic deviation from normal procedures in response to cyclic needs of the institution. Objectives and deadlines furnished by higher authority
 - Occasional supervisory involvement required as a participant or in developing assignments and time tables for specific projects within the ongoing overall operations of the unit involved. Long term objectives and priorities normally provided by higher authority
 - Frequent supervisory involvement is required in order to assure effective interaction between subordinates in response to ongoing operational cycles or frequent emergent problems
 - Supervisory responsibility is for determining general priorities, advising upon deadlines, developing or approving methods, procedures and/or policies between subordinates

FACTOR F

S9 Difficulties in determining effective job performance of subordinates, identification of need for further training and/or closer supervision and assessing potential for increased responsibilities.

- Check one: Not applicable
 Work of subordinates is primarily of uniform, stable and routine nature. Observations can be made with little difficulty
 Work of subordinates is stable and routine but is not uniform, requiring supervisory knowledge of several areas or types of work
 Subordinate positions represent a diversity of job types which require supervisory familiarity with several different sets of performance criteria
 Subordinate positions include several jobs, where technological changes are frequent and/or operational cycles require fluctuation in job content
 Subordinate responsibilities are long term and of a broad nature, requiring prolonged periods of observations to determine effectiveness

FACTOR G

S10 Your need to keep up to date because of technological change in type of work in subordinates' positions.

- Check one: Not applicable
 Routine operational data. Need to keep up to date pertains to the adequacy of tools, equipment, material, technique, methods and procedures
 Diverse operational data. Need to keep up to date pertains to adequacy of tools, equipment, material, technique, methods, and procedures
 Technical data. Need to keep up to date pertains to change of tools, equipment, material, technique, methods and procedures
 Technical and operational data. Need to keep up to date requiring intimate knowledge and understanding of changes
 Complex operational and technical data, subject to frequent change. Need to keep up to date requiring intimate knowledge and understanding

FACTOR H

S11 Coordination required between work of subordinate unit(s) and with other units, impact of work of this unit on other units.

- Check one: Not applicable
 Coordination minimal, involving matters of routine nature and minimal impact
 Coordination required with staffs of several non-subordinate units.
 Coordination is institutional in scope. Coordination is complex. Time is of essence. Impact is campus-wide
 Coordination is System-wide or involves formal relationships with outside groups. Impact is System-wide or beyond

AREA II Commitments - measures the extent of responsibility vested in the position for making commitments on behalf of the institution or obligating the institution in any way at any time.

FACTOR A

S12 Responsibility for commitments, including purchasing, personnel and contractual obligations.

- Check one: Not applicable
 Limited to recommendation, subject to review within organizational unit
 Indirect authority. Subject to review by supervisor who also has fiscal authority for organizational unit
 Direct decision making authority. Fiscal authority for organizational unit. Subject to review at campus level
 Direct decision making authority. Fiscal authority campus-wide. Subject to review at System or Board level
 Overall commitment authority System-wide. Review function is in broad budgetary categories

FACTOR B

S13 Duration of commitment (Time span of commitment, including staffing, money, materials).

- Check one: Not applicable
 Short term commitment. Decision based upon established procedures or precedents
 Short term commitment. Established procedures or precedents may or may not be available
 Commitments fiscal year or less duration. Based on broad guidelines or approved plans
 Commitments exceed one fiscal year. Broad guidelines or precedents are available
 Long term commitments (in excess of 3 years). No guidelines or precedents available

FACTOR C

S14 Impact on costs of operations and performance of other units (related to commitments of staffing, money, materials).

- Check one: Not applicable
 Impact limited to operational unit
 Impact limited to department
 Impact college-, school- or division-wide
 Impact campus-wide
 Impact System level

FACTOR D

S15 Responsibility for data analysis and budget development.

- Check one: Not applicable
 Data secured from operating experience. Application of data developed is subject to change by departmental decision
 Data secured from operating experience. Subject to change by division decision
 Data secured from operating experience, but involves consideration of planning factors or estimates. Subject to change by campus administration

- Data secured from operating experience and/or developed from projected plans. Subject to change by campus administration
- Data requires coordination of the various operating activities of the System and becomes a major part of the overall budget document for the institution

FACTOR E

S16 Impact on personnel matters (such as morale, performance, etc.).

- Check one: Not applicable
 Unit
 Department
 Division
 Campus
 System

FACTOR F

S17 Impact of commitments on community vendors and/or public at large (the decision-making authority which may influence institutional relationships).

- Check one: Not applicable
 Decision making involves simple alternatives, minimum changes, standards or plans. For recommendations only. Recommendations will be within established policy and procedural guidelines
 Decision making involves several simple alternatives which may alter standards or plans within established policy and procedures
 Decision making involves several diverse alternatives which may include changes in procedures, plans and standards
 Decision making involves complex alternatives. May involve changes in established procedure or standards
 Decision making involves complex, controversial and sensitive issues. May involve variation and interpretation of policy

AREA III Equipment, Assets, Money, Records and Reports - measures the responsibility vested in the position for the control (use, maintenance and protection) of machinery, buildings, equipment, facilities, materials, tools, records, money (including negotiable documents), and other physical assets; authorizing the use of System funds or assets; and budgetary control over the use of funds.

FACTOR A

S18 Responsibility for use and control over handling.

- Check one: Not applicable
 Oneself
 Within unit
 Within department
 Within school or division
 Within campus

_____ System-wide and/or by other agencies or general public

FACTOR B

S19 Responsibility for maintenance.

- Check one: _____ Not Applicable
_____ Within direct control
_____ Indirect within unit
_____ Indirect within department
_____ Indirect within school or division
_____ Indirect within campus
_____ Indirect System-wide

FACTOR C

S20 Confidential data or material.

- Check one: _____ Not applicable
_____ Data or information exposed or developed are primarily operational and related only to activities of the smallest formally organized unit
_____ Data or information exposed or developed are primarily operational but related to activities of two or more organizational units within the department or division. Indiscreet divulences could create a limited amount of dissension and embarrassment for the units involved
_____ Data or information exposed or developed are operational in nature. Usually, they are generated by or emanate from the divisional or departmental level. Indiscreet divulences could create internal dissension and have limited embarrassment for the department or division at that level
_____ Data or information exposed or developed are of significance. Indiscreet divulgence could cause dissension or create embarrassment to the employee, employer or public relations
_____ Data or information exposed or developed are related to the general commitment or posture of the institution, including its governing board. Divulgence would have serious impact on the institution's position with the public, legislature, state and/or federal agencies

FACTOR D

S21 Difficulty identifying and correcting administrative problems.

- Check one: _____ Not Applicable
_____ Readily determined, easily corrected
_____ Established procedure, easily corrected
_____ Established procedure, correction complicated
_____ Complicated identification and correction
_____ Extremely complex and highly specialized
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AREA IV Tangible Results, Projects or Programs - measures the responsibility vested in the position for achievement of results within the area of supervision, coordination or direction of operations and personnel.

FACTOR A

S22 Complexity of work (duties and responsibilities).

- Check one: Not applicable
 Well-defined, stable, not subject to change
 Generally defined, may be subject to change
 Generally defined, infrequent change
 Generally defined, frequent change
 Defined only in broad general terms, subject to continuing change

FACTOR B

S23 Mental effort, initiative or resourcefulness required for effective performance.

- Check one: Not applicable
 Repetitive or identical situations requiring solution by simple choice of known things
 Patterned or similar situations requiring solution by selective or optional choice of known things
 Dissimilar situations requiring search for solutions within area of known things. Requires the ability to determine effective application of resources and facilities
 Variable situations requiring analytical, interpretive, valuative and/or constructive application of known things
 Novel or non-recurring situations requiring development of new and/or imaginative concepts and solutions. Responsibility for effective utilization of existing resources and facilities

FACTOR C

S24 Communications and coordination with others.

- Check one: Not applicable
 Communication and coordination of simple, routine tasks with line or staff function at the same organizational level
 Communication and coordination of simple, routine tasks with line or staff function at several organizational levels
 Communication and coordination of diverse tasks with line or staff functions at several organizational levels
 Communication and coordination of diverse tasks with line or staff functions at the highest administrative level on campus
 Communication and coordination of diverse tasks with line or staff functions at the highest administrative levels and involving external affairs

FACTOR D

S25 Judgement (consequence of error).

- Check one: Not applicable
 Evaluate information for recommendation only. Decision making usually involves few simple alternatives. Consequence of error essentially insignificant
 Evaluate information on basis of guidelines provided. Decision making involves choice between several simple alternatives. Consequence of error significant to own department or unit
 Evaluate information on basis of limited, pertinent data. Decision making usually involves choice between somewhat complex alternatives. Consequence of error significant to division or college
 Evaluate information on basis of minimal guidelines available. Decision making involves choice between complex alternatives. Consequence of error significant to entire campus
 Essentially, information or guidelines unavailable. Decision making involves choice between extremely complex alternatives. Action relates usually with matter of long-term consequence and significance

FACTOR E

S26 Planning, operations, appraising results of operation, and taking corrective action to ensure effective results.

- Check one: Not applicable
 Planning, appraisal and corrective action involves one level of organization
 Planning, appraisal and corrective action somewhat complex involving more than one level of organization
 Planning, appraisal and corrective action complex and involves several levels of organization and requires follow-up on action taken
 Planning, appraisal and correction action involves several levels of organization and periodic report of results
 Planning, appraisal and corrective action involves several levels of organization and reappraisal of results in a wide organizational context

AREA V Education and Experience - based on the formal, post-high school education and post educational related work experience which would be considered prerequisites for employment consideration of applicants for the particular administrative, managerial or supervisory position being evaluated. It is not an evaluation of the credentials held by the person now holding the position.

FACTOR A

S27 From your personal and actual experience in your position, what formal post high school education provides the minimum qualifications (knowledge, skills and/or abilities) required for acceptable performance of the job?

- Check one: None (High School Diploma is sufficient)
 Associate's Degree
 Baccalaureate Degree
 Master's Degree
 PhD, LLB or DVM
 Doctor of Medicine

FACTOR B

S28 Minimum related work experience required (in addition to the formal education checked above) for the acceptable performance of the job.

- Check one: Associate's degree only - no experience or no degree and up to 2 years experience
 Associate's degree and up to 2 years experience or no degree and 3-4 years experience
 No degree and 5 years or more experience or Associate's degree and 3-4 years experience or Bachelor's degree and up to 2 years experience
 Associate's degree and 5 years experience or Bachelor's degree and 3-4 years experience or Master's degree and up to 2 years experience
 Bachelor's degree and 5 years experience or Master's degree and 3-4 years experience or PhD degree and 1 year experience
 Master's degree and 5 years experience or PhD degree and 2-4 years experience or DVM or LLB degree and 1 year experience
 PhD degree and 5 years experience or DVM or LLB degree and 2-3 years experience or MD degree and 1 year general practice medicine
 DVM or LLB degree and 4 or more years experience or MD and 2 or more years general practice medicine or 1 year specialized practice medicine

S29 List any information you feel important which has not been covered by any of the items S1 through S28 of this Supplement.