What is Performance Management?

Performance management focuses on the supervisor’s basic responsibility of encouraging results through the efforts of other individuals and is the foundation of performance excellence. Effective performance management is an on-going process which involves the position description, performance evaluations, corrective action, and rewards and recognition through a coaching model.

What is a Position Description?

A position description is an official written list of a position’s responsibilities and requirements, not the capabilities of the employee. It is designed as a resource for supervisors to:

- identify and select employees
- set expectations for the job
- provide a point of reference for employee performance accountability
- assist in leave administration
- aid in legal aspects
Texas Tech position descriptions consist of four major components:

- **Administrative Information**: information required by Texas Tech to post a new job or make changes to an existing job which includes hours/shifts, overtime or travel required and other specifics to time worked
- **Essential Functions**: summarizes the primary job duties that a qualified individual must be able to perform and details the required tasks, knowledge, skills, abilities, responsibilities, and supervisory role
- **Physical Demands**: physical requirements that must be met to perform the essential functions of the position
- **Environmental Conditions**: conditions associated with the work environment for the position

### Administrative Information

<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>Department</th>
<th>Current Position Description</th>
<th>New Position</th>
<th>Reclassification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Position Class</td>
<td>Position #</td>
<td>Last Name</td>
<td>First Name</td>
</tr>
<tr>
<td>R #</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Transaction Type:**

- **Current Position Description** – Select this option when a position description is being completed on an employee for their current position.
- **New Position** – Select this option when the position has been created in your department and there is not a previous position description.
- **Reclassification** – Select this option when the employee is being reclassified into a different position.

If there is unknown information regarding the employee’s position, information is available through the links below:

- **Texas Tech Pay Plan** ([www.depts.ttu.edu/hr/PayPlan/](http://www.depts.ttu.edu/hr/PayPlan/)) - search by position
- **HR 121 Cognos Report** ([https://cognos.texastech.edu/](https://cognos.texastech.edu/)) - search by employee name or R#  
- **HR010 Vacant Positions by Org Cognos Report** ([https://cognos.texastech.edu/](https://cognos.texastech.edu/)) - search by Org
Security Sensitive Level:
Please refer to OP 70.20, Employment in Security-Sensitive Positions
www.depts.ttu.edu/hr/PayPlan/ to determine if the position is a Security Sensitive Level I or II. The department will want to stay consistent with procedures followed in the past for positions throughout their department. If there are any questions or assistance needed in determining the level of a position, you may contact Human Resources at 806-742-3851.

Reports To:
If the evaluator and “Reports To” are not the same person, communication between the two is critical to provide consistent, accurate feedback for the employee.

Work Schedule:
Identify the days and hours that are required for position’s regular work schedule. If the schedule varies, list all possible days and hours that the employee may be scheduled. Then state “variable work schedule” in the Other comment box, to the right of the work schedule box.

Additional suggestions for Other include but are not limited to:
- Night Differential
- Variable Work Schedule
- Call Back
- On Call
Overtime & Travel:

If the position is non-exempt, there will always be a possibility that the position may require overtime. In the Specify box, describe the frequency of overtime that may be required for the position. For example, as needed, weekly, peak work season, rare, etc.

Travel may be needed for any position. In the Specify box describe the frequency of travel that may be required for the position. For example, as needed, weekly, monthly, rare, etc.

Job Summary:

Texas Tech Human Resources provides a generic job summary for each position in the Texas Tech Pay Plan (www.depts.ttu.edu/hr/PayPlan). To locate the position’s job summary, type a keyword into the search box relating to the position. This will search the job title and description fields of all positions. For example, you can search by entering “analyst” into the search box for an Analyst position. Once your selection has been found, click on the job title to link to the position’s pay plan.

Copy the contents of the Position Description from Texas Tech Pay Plan and paste in the Job Summary box on the position description form.

Essential Job Functions
Essential job functions are the fundamental job-related duties necessary to the position. A function may be considered essential for a variety of reasons, including (but not limited to) the following items:

- The reason the job exists is to perform the function.
- There are a limited number of employees available to distribute this function among.
- The functions may be highly specialized and require specific expertise or ability.

Essential job functions are distinguished from other nonessential or marginal functions that are part of the job but are ancillary to the purpose and nature of the job. Adequate definition of and justification for the essential functions of the job provide a clear foundation for establishing job expectations and for clarifying the conditions under which the job will be performed. This information also serves as clarification when addressing ADA, FMLA or other job-related concerns.

Although most essential job functions are clear, some functions may seem to waiver between essential and non-essential. If it is difficult to classify a function as essential or non-essential, the following questions may provide a basis for determining essential job junctions.

<table>
<thead>
<tr>
<th>Essential Function Characteristics</th>
<th>Determination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does the job exist to do this function?</td>
<td>Yes</td>
</tr>
<tr>
<td>Are there critical skills, experience, training, education, license, etc. needed to perform the function?</td>
<td>Yes</td>
</tr>
<tr>
<td>Is specialized Equipment used?</td>
<td>Yes</td>
</tr>
<tr>
<td>Can other incumbents do this function if necessary?</td>
<td>Yes</td>
</tr>
<tr>
<td>Would eliminating this function significantly alter the job?</td>
<td>Yes</td>
</tr>
<tr>
<td>Does the employee spend a significant amount of time performing the function?</td>
<td>Yes</td>
</tr>
<tr>
<td>Based on the answers above, is the job function essential (as opposed to nonessential)?</td>
<td>Yes</td>
</tr>
</tbody>
</table>

In writing essential job functions:

- Be sure to address outcomes and areas of responsibility rather than how to do the job.
- Spell out technical details so that those referring to the job description will know what it is saying.
- Samples of job descriptions and essential functions are available through O*NET (http://online.onetcenter.org), the Department of Labor’s tool for formulating job descriptions and essential functions.
Global Competencies

Global competencies are designed to identify an essential set of skills, attitudes, and knowledge that align employee performance with the university’s standards.

GLOBAL COMPETENCIES
An essential set of skills, attitudes, and knowledge that align performance with the university’s standards.
1. **Quality of Customer Service**
   - Delivers high level of service which meets the needs of the customer
2. **Compliance**
   - Complies with all university and departmental rules, laws, policies and procedures
3. **Staff Development**
   - Attends all required training or certification programs within the specified time frames
4. **Planning and Organizing Work**
   - Effective and efficient utilization of time and resources
5. **Dependability**
   - Degree to which the employee can be relied upon to complete tasks in a timely manner
6. **Quality of Work**
   - Accurate, neat, thorough
7. **Initiative**
   - Anticipates and responds to the needs of the department
8. **Relationship with Others**
   - Respectful, cooperative, and effective in getting along with a diverse group of employees and customers

GLOBAL COMPETENCIES continued
9. **Adaptability**
   - Effectively adjusts to change
10. **Communication (oral and written)**
    - Expresses ideas/information in a complete, clear, concise, organized, and timely manner; actively listens to others and is open to suggestions
11. **Accountability**
    - Accepts responsibility for job performance
12. **Job Knowledge**
    - Demonstrates an understanding of knowledge specific to the job

The level of supervision required for each position is related to the essential functions as described in the previous section.

LEVEL OF SUPERVISION RECEIVED
Describe the amount of supervision this position receives.
- [ ] **Extensive**
  - Much direct supervision, work with supervisor
- [ ] **Moderate**
  - Access to supervisor and/or lead coworker, when needed
- [ ] **Limited**
  - Work is highly autonomous, performs independently

Consider essential functions, environment and equipment involved to assist in determining level of supervision.
**Supervising Subordinates**

Supervisory responsibilities should be stated in essential functions and should be compatible with the job title.

| SUPERVISING SUBORDINATES
Describe the amount of time and type of supervision given to subordinates. List number and title of employees supervised. |
|------------------------------------------------------------|

Describe the amount of time and type of supervision given to subordinates. List number and title of employees supervised.

---

**Knowledge, Skills, and Abilities**

Demonstrated knowledge, skills and abilities generally required to perform the job.

| REQUIRED KNOWLEDGE, SKILLS, AND ABILITIES
The attributes required to perform the job that are generally demonstrated through qualifying service, education, or training. |
|-----------------------------------------------------------------|

<table>
<thead>
<tr>
<th>Required Knowledge, Skills, and Abilities:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consider required education, level and type of experience, special licenses, registrations or certificates required to perform the job. Review the Essential Functions to determine knowledge, skills, and abilities to perform the job. Refer to O*NET (<a href="http://online.onetcenter.org">http://online.onetcenter.org</a>) for job specific examples.</td>
</tr>
</tbody>
</table>

Hiring managers may request that final applicants for clerical positions take skills assessments prior to or following their interview.

| PREFERRED KNOWLEDGE, SKILLS, AND ABILITIES
Preferred knowledge, skills and abilities, in addition to the required knowledge, skills and abilities. |
|-----------------------------------------------------------------|

<table>
<thead>
<tr>
<th>Preferred Knowledge, Skills, and Abilities:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review the Essential Functions to determine preferred knowledge, skills, and abilities to perform the job. Consider preferred education, level and type of experience, special licenses, registrations or certificates desired.</td>
</tr>
</tbody>
</table>
Qualifications

Required Qualifications:
The Texas Tech Pay Plan (www.depts.ttu.edu/hr/PayPlan) provides a generic list of qualifications required for the job. To locate the position’s qualifications, type a keyword into the search box relating to the position. Once your selection has been found, click on the job title to link to the position’s pay plan.

Copy the contents of the Qualifications box from Texas Tech Pay Plan and paste in the Required Qualifications box on the position description form.

Preferred Qualifications:
In addition to the Required Qualifications, consider preferred education, level and type of experience, special licenses, registrations or certificates desired.

Work Context
How important are the following skills and abilities in accomplishing the essential job functions?

Are these skills and abilities essential or non-essential to the job? Would failure to perform a function have adverse affects on the job?
**Physical Demands**

The physical demands listed in this section will represent those that must be met by the employee to successfully perform the essential functions of the position. Upon hiring a candidate for a position, the physical demands should be discussed during the interview allowing the candidate to see if they can perform the essential functions of the position.

 Appropriately considering and evaluating the physical demands required to meet the essential functions of the position are important steps towards considering and making reasonable accommodations to enable individuals with disabilities to perform these functions. It additionally provides a basis for deciding what duties an employee can or cannot perform should they be placed on modified duty.

The physical demands are listed on the left side of the form and responses are listed to the right of each demand. There are 5 choices for each demand ranging from 0 to 6+ hours per day (broken down in 2 hour increments). If the physical demand is not a part of an essential job function, then N/A (not applicable) should be selected.

**Sit / Stand / Walk:** Several of these demands are implied as part of the essential job functions. For example, most positions may require the employees to sit, stand, or walk throughout the day; it as an essential part of the job.

**Drive:** While almost all of our employees drive to and from work, this area should only be considered an essential job function if the position requires approval as a driver for TTU.

**Bend, Stoop, or Twist:** Many of these functions may be implied in all positions.

**Climb Ladders or Step Stools:** Only consider that which is essential to the job function.

**Stairs:** Only consider that which is essential to the job function. Facilities equipped with elevators should not necessarily consider use of stairs.

**Reach Outward, Above and Below Shoulder:** Many of these functions may be implied in most positions.

**Squat, Crouch, Kneel, or Crawl:** Many of these functions may be implied in most positions.
**Balance:** Only consider that which is essential to the job function.

**Push or Pull / Lift / Carry:** Only consider that which is essential to the job function.

**Ability to Change Positions:** This refers to the frequency the employee is able to move from the position they most often assume.

**Use Feet for Repetitive Movements as in Operating Foot Controls:** Only consider that which is essential to the job function.

## Dexterity Requirements

These are much like physical demands, but focused on use of hands. These requirements are also important in making determinations for reasonable accommodations and modified duty decisions. These requirements also directly correspond to essential job functions and are required in most positions.

![Dexterity Requirements Table]

**Simple Grasping:** Picking-up, holding and using items or supplies that do not require significant strength to hold or use.

**Firm Grasping:** Picking-up, holding and using items or supplies that require more significant strength to hold or use effectively.

**Fine Manipulation:** This refers to activities that require fine motor skills using fingers and hands. Typing is an example of fine manipulation.

**Picking or Pinching:** This is the ability to pick up small items.

## Environmental Conditions

This section provides the environmental conditions associated with the position and assists with identifying potentially dangerous or harmful conditions with prevention in mind. Additionally, these factors may be necessary when considering reasonable accommodations or modified work schedules.

The supervisor should be aware of the environmental conditions that the position will be exposed to. This section should be discussed at the time of the interview so the prospective employee can determine if they will be able to meet these requirements of the position.

The Occupational Safety and Health Administration (OSHA) provides employees with numerous rights including the right to request information from the employer on safety and health hazards in the work area. Further, employers are responsible for providing a safe work environment.
The environmental conditions are listed on the left side of the form and responses are listed to the right of each condition. There are 5 choices for each condition ranging from 0 to 6+ hours per day (broken down in 2 hour increments). If the environmental condition is not a part of an essential job function, then N/A (not applicable) should be selected.

**Sensory Demands**

These demands should only be checked if they are an essential function of the job and the requirement for such should be identifiable in the essential job functions section. These demands may be necessary when considering reasonable accommodations or modified work schedules.

**Acknowledgement**

After reviewing the position description with the employee, both the supervisor and employee must sign the form. The employee should be aware that their position description is not an exhaustive list of all of their responsibilities and management has the right to assign or reassign these duties at any time.
Position Descriptions should be completed or revised when:

- A position is created
- A position is reclassified
- An employee starts a position
- A position’s job responsibilities change (including change in work schedule)

Note: When an employee is hired into an existing position, a position description must be completed, even if there are no changes to the position’s responsibilities. All employees should have a position description on file that reflects their current job responsibilities.

Completed Position Descriptions:
After the position description is completed or revised, a copy of the form will be distributed to:

- Employee
- Human Resources - email copy to hr.positiondescription@ttu.edu

The original copy of the position description is maintained in the department.

The Staff Position Description Form, Supervisor's Guide to Performance Management: Position Description, and Staff Position Description Sample can be located on the TTU HR website under Forms/Performance Management (www.depts.ttu.edu/hr/forms).

Please contact Human Resources Talent Management at 742-3650 for any questions or assistance.
Position Description

Transaction Type: Current Position Description
Date Submitted: Sept. 26, 2012

Department: Financial Services
Org Code: C14004

Title: Section Manager
Extended Title (if applicable): Accountant

Position Class: S0605
Position #: T12345

Security Sensitive Level:
- Level I
- Level II

Last Name: Sample
First Name: Ima
Middle Initial: D
R #: R00654321

Reports To:
Last Name: Boss
First Name: Ida
Middle Initial: B
R #: R00123456
Title: Managing Director

Hours/Shift:

<table>
<thead>
<tr>
<th>Day</th>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>800 AM</td>
<td>500 AM</td>
</tr>
<tr>
<td>Tuesday</td>
<td>800 AM</td>
<td>500 AM</td>
</tr>
<tr>
<td>Wednesday</td>
<td>800 AM</td>
<td>500 AM</td>
</tr>
<tr>
<td>Thursday</td>
<td>800 AM</td>
<td>500 AM</td>
</tr>
<tr>
<td>Friday</td>
<td>800 AM</td>
<td>500 AM</td>
</tr>
<tr>
<td>Saturday</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sunday</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Is overtime required? Yes
Specify: As required

Is travel required? Yes
Specify: Occasional - As required

JOB SUMMARY
Position description from Texas Tech Pay Plan
Manages a section in a department that has institutional oversight. Plans, organizes and develops goals and procedures for the section. Represents the section to administrators, outside agencies and others on relevant matters. Supervises subordinate staff.

ESSENTIAL JOB FUNCTIONS
A job function is essential if removal of that function would fundamentally change the job. Things to consider when determining functions that are essential: Does the job exist to perform that function? Can the function only be performed by a limited number of employees? Does the employee spend a significant amount of time performing this function? If you answered yes, then it is likely to be considered an essential function. If failure to perform a function has adverse affects, it is also likely to be an essential function.

List the essential functions of this job below. Attach separate pages if necessary for additional essential job functions.

Prepare, examine, or analyze accounting records, financial statements, or other financial reports to assess accuracy, completeness, and conformance to reporting and procedural standards.
ESSENTIAL JOB FUNCTIONS continued

- Report to management regarding the finances of establishment.
- Establish tables of accounts and assign entries to proper accounts.
- Develop, implement, modify, and document record keeping and accounting systems, making use of current computer technology.
- Develop, maintain, and analyze budgets, preparing periodic reports that compare budgeted costs to actual costs.
- Analyze business operations, trends, costs, revenues, financial commitments, and obligations, to project future revenues and expenses or to provide advice.
- Inspect account books and accounting systems for efficiency, effectiveness, and use of accepted accounting procedures to record transactions.
- Examine records and interview workers to ensure recording of transactions and compliance with laws and regulations.
- Examine and evaluate financial and information systems, recommending controls to ensure system reliability and data integrity.
- Confer with university officials about financial and regulatory matters.

GLOBAL COMPETENCIES
An essential set of skills, attitudes, and knowledge that align performance with the university’s standards.

1. Quality of Customer Service
   - Delivers high level of service which meets the needs of the customer

2. Compliance
   - Complies with university and departmental rules, laws, policies and procedures

3. Staff Development
   - Attends all required training or certification programs within the specified time frames

4. Planning and Organizing Work
   - Effective and efficient utilization of time and resources

5. Dependability
   - Degree to which the employee can be relied upon to complete tasks in a timely manner

6. Quality of Work
   - Accurate, neat, thorough

7. Initiative
   - Anticipates and responds to the needs of the department
GLOBAL COMPETENCIES continued

8. Relationship with Others
   Respectful, cooperative, and effective in getting along with a diverse group of employees and customers

9. Adaptability
   Effectively adjusts to change

10. Communication (oral and written)
   Expresses ideas/information in a complete, clear, concise, organized, and timely manner; actively listens to others and is open to suggestions

11. Accountability
   Accepts responsibility for job performance

12. Job Knowledge
   Demonstrates an understanding of knowledge specific to the job

LEVEL OF SUPERVISION RECEIVED
Describe the amount of supervision this position receives.

- Extensive
  Much direct supervision, work with supervisor

- Moderate
  Access to supervisor and/or lead coworker, when needed

- Limited
  Work is highly autonomous, performs independently

SUPERVISING SUBORDINATES
Describe the amount of time and type of supervision given to subordinates. List number and title of employees supervised.

Approximately 70% of time providing direct supervision and oversight to 3 subordinates.
1. Section Coordinator
2. Analysts

REQUIRED KNOWLEDGE, SKILLS, AND ABILITIES
The attributes required to perform the job that are generally demonstrated through qualifying service, education, or training.

Bachelor's degree in Accounting, Finance, Economics or related area. Knowledge of accounting, administration, management, and mathematics. Oral and written comprehension and expression. Processing information (compiling, coding, categorizing, calculating, tabulating, auditing, or verifying information or data).

PREFERRED KNOWLEDGE, SKILLS, AND ABILITIES
Preferred knowledge, skills and abilities, in addition to the required knowledge, skills and abilities.

Knowledge of laws, legal codes, government regulations and agency rules. Advanced communication skills (reading, writing, speaking and listening). Critical thinking and decision making. Deductive/inductive reasoning. Developing constructive and cooperative working relationships with others, and maintaining them over time. Knowledge/experience with Banner/COGNOS data management systems.

REQUIRED QUALIFICATIONS
Qualifications from the Texas Tech Pay Plan

Bachelor's degree in job related field and four years of supervisory experience.

PREFERRED QUALIFICATIONS
Qualifications in addition to the required qualifications.

Bachelor's degree in Accounting plus three years experience related to the assigned area.
Certified Public Accountant (CPA).
WORK CONTEXT
How important are the following skills and abilities in accomplishing the essential job functions?

Public Speaking  
Face-to-Face Communication  
Telephone Communication  
Write Letters, Emails, and Memos  
Develop and Implement Policies and Procedures  
Meet Strict Deadlines  
Responsible for Outcomes and Results  
Develop Objectives and Strategies, Strategic Planning  
Evaluate Information to Determine Compliance  
Deductive Reasoning, Make Decisions and Solve Problems  
Manage Processes, Resources, and People  
Coordinate or Lead Projects and Teams

PHYSICAL DEMANDS
In an average workday, employee is required to:

Approximate Amount of Time per Day (in hours)

0 - 2  |  2 - 4  |  4 - 6  |  6+  |  N/A
---  |  ---  |  ---  |  ---  |  ---
Sit  |  |  |  |  |  
Stand  |  |  |  |  |  
Walk or Move About  |  |  |  |  |  
Drive  |  |  |  |  |  
Bend, Stoop, or Twist  |  |  |  |  |  
Climb Ladders or Step Stools (ascend/descend)  |  |  |  |  |  
Stairs (ascend/descend)  |  |  |  |  |  
Reach Outward, Above and Below Shoulder  |  |  |  |  |  
Squat, Crouch, Kneel, or Crawl  |  |  |  |  |  
Balance  |  |  |  |  |  
Push or Pull  |  |  |  |  |  
Usual amount 10 lbs  |  |  |  |  |  
Max amount 20 lbs  |  |  |  |  |  
Lift  |  |  |  |  |  
Usual amount 15 lbs  |  |  |  |  |  
Max amount 25 lbs  |  |  |  |  |  
Carry  |  |  |  |  |  
Usual amount 15 lbs  |  |  |  |  |  
Max amount 25 lbs  |  |  |  |  |  
Is employee able to change positions?  |  |  |  |  |  
Never  |  |  |  |  |  Occasionally  |  |  |  |  |  
Frequently  |  |  |  |  |  As Needed  |  |  |  |  |  

Use feet for repetitive movements as in operating foot controls:

Right:  |  Yes  |  No
Left:  |  Yes  |  No
Both:  |  Yes  |  No
Exposure to chemicals or toxic materials
Exposure to distracting or unpleasant noise or sounds
Exposure to dust, smoke, fumes, odors, grease, oil
Exposure to electrical hazards
Exposed to vibration
Works at heights
Works with moving machinery or heavy machinery
Works alone
Works with others
Works outdoors, exposed to weather conditions
Works indoors, may or may not have natural light
Works in cramped quarters or congested areas
Works in extreme temperatures

SENSORY DEMANDS
Check all that apply.

- [ ] Hear
- [ ] Speak
- [ ] Taste
- [ ] Touch
- [ ] Smell
- [ ] Near Vision
- [ ] Night Vision
- [ ] Color Vision
- [ ] Far Vision
- [ ] Depth Perception
- [ ] Spatial Perception

ACKNOWLEDGEMENT
The above position description is intended to describe the general nature and level of work being performed. It is not intended to be construed as an exhaustive list of all responsibilities, duties, skills, work schedule, overtime, or travel for the position. Nothing in this position description restricts management's right to assign or reassign duties and responsibilities at any time.

Signature of Employee

Signature of Supervisor

DISTRIBUTION
Original - Department File  Copy - Employee  Copy - Human Resources (hr.positiondescription@ttu.edu)