



Instructions for Position Description and Supervisory Analysis Forms

Below are copies of the [Position Description Form](#) and [Supervisory Analysis Form](#), with instructions and notes.

[Read more information about position descriptions.](#)

CITY OF MADISON POSITION DESCRIPTION

1. Name of Employee (or "vacant"):

Work Phone:

2. Class Title (i.e. payroll title):

This refers to the official title on the class specification, such as Administrative Clerk 1.

3. Working Title (if any):

This refers to the working title, such as Payroll Clerk. Not all positions have a working title.

4. Name & Class of First-Line Supervisor:

Work Phone:

5. Department, Division & Section:

6. Work Address:

7. Hours/Week:

The work hours associated with the position, including whether the position is a 40-hour or 38.75-hour/week position.

Start time: End time:

8. Date of hire in this position:

If applicable. Leave blank if the position is vacant.

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9. From approximately what date has employee performed the work currently assigned:

This should be completed when responsibilities of a position change, or an agency or employee is requesting a position study.

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10. Position Purpose: (How this position fits into the overall mission, vision, and goals of your agency and work unit.)

This section should describe how the position fits into the overall mission, vision, and goals of your agency and work unit.

11. Position Summary:

This should be a general description of the requirements of the specific position. The classification specification has a summary General Responsibilities paragraph that can be incorporated into the position description. Be sure those General Responsibilities are tailored to the specific position and do not include unrelated information and responsibilities.

For example, the General Responsibilities in the class specification for an Administrative Clerk 1 says, "Employees in this classification may serve as an agency/agency/division payroll clerk, may be the first contact for purchasing, may be responsible for preparing meeting agendas or minutes in the Legistar system, or may perform other administrative tasks." However, when writing the position description for a payroll clerk, the Position Summary in the position description should say, "This position is primarily responsible for serving as the agency payroll clerk and may perform other administrative tasks."

If the classification specification for the position is out of date, the Position Summary paragraph in the position description may need to be revised to incorporate information that has changed since that classification specification was last updated.

For example, if the Planning Division has a vacancy in the Transportation Planning Manager classification, a position description needs to be prepared and updated to accompany the requisition. The class specification for the Transportation Planning Manager has not been updated for a number of years and the General Responsibilities paragraph of the class specification makes reference to the Planning Unit and includes the statement, "The work is characterized by responsibility for supervising the activities and functions of the Transportation Planning Services Section of the Unit." However, when considering the duties and responsibilities currently associated with the position for the updated position description, perhaps the agency name has changed, and additional responsibility was added to the position to staff newly created boards, commissions and/or committees. In order to reflect these changes, the updated position summary now says, "The work is characterized by responsibility for supervising the activities and functions of the Transportation Planning Services Section of the Division, and provides staff support and professional planning services for the Madison Area Transportation Planning Board, Technical Committee, and Ad Hoc Advisory Committee."

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12. Functions and Worker Activities: (Do NOT include duties done on an "Out-of-Class" basis.)

A well-crafted position description will group related tasks together and provide an estimated percentage. Logical groupings make the position description much easier to read to understand, and the percentages give a sense of how the employee generally spends time. The position description form gives an outline (see below).

Here are some suggestions for completing this section:

- **Supervisors should talk to the employee** when writing the position description. No one will have a better idea of what is involved with a position than the person actually doing the work. If a supervisor knows an employee is leaving, meeting with them to go through the position description can make sure it is up-to-date for the upcoming recruitment process. The supervisor has the final say as to what is included in the position, but employees can be involved in drafting them.
- **It may be easier to start by creating a list of all of the tasks for the position.** Then, once you have a comprehensive list you can start grouping tasks together. Once you have these groups, label them with categories. These categories would become the A, B, C, etc. of general areas of responsibility in the form, and the tasks would be under them.
- **Be sure to look at the big picture when doing the percentages.** Many positions have workloads that fluctuate weekly, monthly, or even quarterly. There may be tasks that happen during a specific time of the year, but during that period, they require most of the employee's time. Looking at a week or even a month may not give an accurate picture of how an employee spends their time.
- **Review and update annually.** When supervisors and employees discuss the position description as part of the [Employee Check-in Process](#), it is kept up-to-date. Processes and workflows can change from year to year, and supervisors and employees need to have accurate position expectations.

When the duties and responsibilities in a position description change, supervisors should meet with the employee to discuss the update and associated performance expectations. If the position has changed significantly, a position study can be requested through the [reclassification process](#).

0-100% A. General area of responsibility

1. Specific task- grouping similar tasks together makes this easier to read.
2. Specific task
3. Etc.
- 4.
- 5.

% B.

- 1.
- 2.
- 3.
- 4.
- 5.

C.

- 1.
- 2.
- 3.
- 4.
- 5.

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% D.
1.
2.
3.
4.
5.

% E.
1.
2.
3.
4.
5.

13. Primary knowledge, skills and abilities required:

The primary knowledge, skills, and abilities (KSAs) required to do the tasks associated for a specific position. Some of this information can be copied from the classification specification if they are accurate for this specific position. If the position is in a broad classification where all the KSAs don't necessarily apply to each position, only the appropriate KSAs should be included on the position description. If there have been changes that require new KSAs, they should be added. **For example**, over the past 30 years computer use has increased. Most positions should include a statement saying "Knowledge of and ability to use computer software applicable to the duties of the position."

Knowledge definitions: For the knowledge portion, three phrases refer to specific levels of knowledge and corresponding experience/

- **"Knowledge of..."** means the employee should be familiar with the concept.
- **"Working knowledge of..."** means the employee or candidate has previously been in positions that required application of the concept for at least 2-3 years.
- **"Thorough knowledge of..."** means the employee or candidate has applied the concept for at least 4 years and could teach it to others.

14. Special tools and equipment required:

15. Required licenses and/or registration:

16. Physical requirements:

Every position description should have a description of the physical requirements. **For example**, if an employee will to work at a computer for extended periods, or will have to navigate over uneven terrain to inspect work in all types of weather. The physical requirements section is important for determining whether a person can perform the necessary duties of the position and potential accommodations.

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17. Supervision received (level and type):

This should be a simple description. In most cases, employees are either going to be working under close, limited, or general supervision:

- **Close supervision** means each task is going to be reviewed with the supervisor.
- **Limited supervision** means that a project may be reviewed with the supervisor at the start and finish, but the employee is given the latitude to carry out the project.
- **General supervision** means an employee receives an assignment and is expected to carry it out, including defining the scope, associated tasks, and completion. Supervision is only involved to the extent the employee either has questions or is failing to perform the work.

18. Leadership Responsibilities:

Leadership responsibilities of the position should have the appropriate box should be checked. Position descriptions that indicate actual supervisory responsibility need to be accompanied by the [Supervisory Analysis Form](#), described in more detail in the following pages.

Positions represented by a union or employee association should not be considered supervisory.

This position: ☐ is responsible for supervisory activities (Supervisory Analysis Form attached).
☐ has no leadership responsibility.
☐ provides general leadership (please provide detail under Function Statement).

19. Employee Acknowledgment:

The signature sections of the position description should have the appropriate boxes in each section checked, and the employee and supervisor should sign and date confirming the position description has been received and reviewed. Written comments should be attached to explain any differences between the supervisor and employee descriptions of the position.

If a position is vacant, a Word document without signatures can be submitted with the requisition.

- ☐ I prepared this form and believe that it accurately describes my position.
☐ I have been provided with this description of my assignment by my supervisor.
☐ Other comments (see attached).

EMPLOYEE

DATE

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20. Supervisor Statement:

- ☐ I have prepared this form and believe that it accurately describes this position.
- ☐ I have reviewed this form, as prepared by the employee, and believe that it accurately describes this position.
- ☐ I have reviewed this form, as prepared by the employee, and find that it differs from my assessment of the position. I have discussed these concerns with the employee and provided them with my written comments (which are attached).
- ☐ I do not believe that the document should be used as the official description of this position (i.e., for purposes of official decisions).
- ☐ Other comments (see attached).

SUPERVISOR

DATE

Instructions and additional forms are available from the Human Resources Dept., Room 261, Madison Municipal Bldg., calling 266-4615 or visiting cityofmadison.com/employeenet/policies-procedures/position-descriptions.

CITY OF MADISON Supervisory Analysis Form

This form is only for supervisors' position descriptions. This form is required if question 18 (Leadership Responsibilities) of the position description has the "supervisory activities" option checked.

This form is to be completed for all supervisory positions and is to become a permanent attachment to the current Position Description for the position. This information will be used to document the nature and extent of the "supervisory" duties assigned and to determine how that will affect the classification of the position.

A "supervisor" is generally defined as an employee who has authority and uses independent judgment to hire, transfer, suspend, layoff, recall, promote, discharge, assign, reward, or discipline other employees, or to effectively recommend such actions to a higher level authority. A "supervisor" is also usually the first level of resolution of employee grievances. An employee does not need to have authority in each area and does not need to exercise that authority on a regular basis to be considered a supervisor.

General Information:

1. Employee Name (or "Vacant"): _____
2. Position Class Title and CG/Range: _____
3. Name, Class, and CG/Range of Supervisor: _____
4. Department/Division/Unit/Section: _____
5. Please list those positions directly supervised:

This information is required, and should include all of the employees this position supervises. The class title refers to the official title on the class specification.

| Class Title | # of Employee | Status (e.g., Permanent/Hourly) | Compensation Group/Range |
|---------------------------------|---------------|---------------------------------|--------------------------|
| Example: Administrative Clerk 1 | 3 | Permanent | 20/09 |
| Example: Management Intern 1 | 1 | Hourly | 17/00 |
| | | | |
| | | | |
| | | | |

Please attach organizational chart.

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6. NATURE OF SUPERVISION. Please indicate the level of responsibility and authority assigned. If authority does not extend to all those listed in #5, specify exceptions. "Full Responsibility" suggests that the employee performs supervisory activities with a high degree of independence (subject only to administrative review). "Effectively Recommend" means that while a higher level supervisor/manager retains final authority on the matter, the recommendation of the incumbent in this position is generally followed.

Hire/Promote: ☐ Full Responsibility ☐ Effectively Recommend ☐ None

Transfer: ☐ Full Responsibility ☐ Effectively Recommend ☐ None

Assign: ☐ Full Responsibility ☐ Effectively Recommend ☐ None

Layoff/Recall: ☐ Full Responsibility ☐ Effectively Recommend ☐ None

Discipline/Discharge: ☐ Full Responsibility ☐ Effectively Recommend ☐ None

Grievance Handling: ☐ Full Responsibility ☐ Effectively Recommend ☐ None

This information accurately reflects the supervisory responsibilities assigned to this position.

Unless the position is vacant, both the employee and their supervisor should sign this form. The supervisory analysis form is attached to position descriptions .

Employee's Signature

Date

Supervisor's Signature

Date