

Criteria for Evaluating Position Description Questionnaires for Positions in Information Technology

Listed below are the criteria used when evaluating a position, along with a description for each criterion as to how it applies to classifications in information technology (IT). This document is targeted to incumbents and supervisors who are completing Position Description Questionnaires (PDQs) for IT positions, and may also prove useful to human resources representatives, administrators, and others in evaluating PDQs.

When completing a Position Description Questionnaire (PDQ), please provide enough detailed information for each of these criteria so that a fair and accurate determination can be made as to the classification of the position. Supervisors and human resources representatives may wish to review new or revised PDQs to ensure they provide adequate detail with respect to addressing each of these criteria.

General Notes

- The classification for a position describes the position itself, not the person working in that position. Classification is determined by the work to be performed by incumbents in the position, not by the incumbent's credentials. In other words, while the incumbent's years of experience, accrued knowledge, and level of performance directly affect the incumbent's effectiveness and ability to succeed, they are not factors in determining classification. Each classification encompasses a sufficiently broad pay range in order to recognize distinguished performance.
- Each classification stands alone. Just because a classification is the first in the series for a particular job family does not imply that the position is viewed as an entry-level position or that incumbents will be reclassified to a higher level when they become more skilled at their job.
- If the job responsibilities for a position do not change, the level for that position does not change. While the various levels of classifications within a job family may imply a possible career path, the career path is for the individual, not for the position. If the job responsibilities do not change, then the only potential career growth for an incumbent may be to leave that position and accept another one with increased responsibilities.
- Positions in central IT units tend to reflect a higher degree of specialization, whereas positions in decentralized units are more generalized. As a result, incumbents who work in decentralized units are more likely to have responsibilities that span multiple IT job families and (perhaps) multiple levels within a job family. They may exercise considerable independent judgment and perform responsibilities listed as characteristic duties in multiple upper-level positions simply because there is no higher-level staff within the unit to perform these tasks. Both the breadth and depth of the position, however, must be taken into consideration when evaluating a PDQ. Positions are classified based on their best fit, and not simply to the highest-level position that includes characteristic duties the incumbent sometimes performs.

Education/Experience

- This criterion established the minimum education level and years of experience required.
- While the years of experience for a known incumbent may be included on the PDQ, the position is evaluated by the minimum education and experience required in order for a candidate to be fully functional in the position being evaluated. An incumbent having more years of experience than (the minimum) required is not a basis for a higher classification.

Relevant PDQ Questions: #26, #27, #28

Independent Judgment

- This criterion is a measure of the level of applied knowledge the position requires for decisions that impact a unit's ability to function and to implement its mission. The incumbent's level of authority is taken into account. An incumbent's control over his or her own daily/weekly schedule is only a minor factor of independent judgment.
- When completing a PDQ, provide detail on job responsibilities that demonstrate independent judgment. Examples may include but are not limited to: decisions on vendor relationships, group/department software tool selection, database engine selection, decisions related to purchasing a commercial product vs. writing software in-house, choosing to submit sole source justifications, and responsibilities for budgeting, hiring, and staffing.

Relevant PDQ Questions: #4, #5, #8, #9, #10

Problem Solving/Critical Thinking

- This criterion is a measure of the level of deductive reasoning required by the incumbent to be successfully in the position. The higher the level of a position, the more responsibility and authority the incumbent has to provide creative, innovative solutions. Work that is dealt with by applying established procedures requires only a low level of deductive reasoning.
- Questions to consider include:
 - At what level of complication is the incumbent required / allowed to extend or alter established procedures or to create new procedures?
 - Does the position require the incumbent to regularly solve complicated technical problems?
 - What are the consequences of failing to solve the problems?

Relevant PDQ Questions: #5, #7, #10, #13

Communication/Interpersonal Skills

- This criterion describes the communication skill level required of an incumbent. It establishes the level and means of communication required of the incumbent to be successful / function effectively in a technical environment. IT staff must be able to communicate with:
 - other IT personnel who may have more or less technical knowledge than they do,
 - power users,
 - technical experts in other fields,
 - and end users.
- Provide examples of communication and interpersonal skills required for this position. Examples may address such factors as mentoring, team building, meeting facilitation, mass communication, lecturing, and consensus building.

Relevant PDQ Questions: #19

Responsibility/Scope

- This criterion describes the environment over which the incumbent can or has the authority to effect change. In many situations it describes the incumbent's clientele, which might range from a **department** (for example, an academic department within a college or a clinical department within the hospital) to a **college** or **organizational unit** to **enterprise-level** (the entire University). The word **unit** is meant generically to describe any one of these environments at any level.
- Elements that affect scope include the extent to which:
 - IT support is integral to the daily operations of the unit,
 - the incumbent is responsible for technical solutions that are unique to an area (such as, financial, clinical, or operational systems not replicated elsewhere on campus)
 - the incumbent relies on centralized IT support (provided centrally by ITS and/or HCIS).
- An application that supports thousands of users, or has users across campus, is not necessarily more complex than an application with a smaller user base; i.e. the volume of activity or the raw number of users supported by the incumbent does not necessarily affect the scope of responsibilities.

Relevant PDQ Questions: #2, #3, #16, #19, #23, #24, #30-37

Customer/User Responsibility

- This criterion is a measure of how directly the incumbent is driven by user interaction versus user requirements. Factors that come into play include but are not limited to the:
 - importance of the issue to the mission of the unit,
 - complexity of the problem or project,
 - urgency of the situation,
 - difficulty of the situation,
 - number of staff and staff hours required.

- Describe the nature of the incumbent's customer base. For example, some IT positions require substantial direct contact with (non IT) end users, whereas customers in other positions are more likely to be departmental representatives or even other IT personnel.
- Include details about the types and frequency of interactions the incumbent has with his/her customer base.

Relevant PDQ Questions: #2, #3, #13, #36, #37

Resource Management

- This criterion is a measure of the level of applied knowledge, scope, responsibility, and authority required for the management of departmental, organizational, or enterprise resources.
 - Resources may include staff, budget, time, equipment, software, relationships, and space.
 - Authority may include providing input, making recommendations, making final purchasing decisions subject to administrative approval, and having final signing authority over a budget line.

Relevant PDQ Questions: #23, #25, #30

Organizational/Business Knowledge

- This criterion is an evaluation of how deeply an incumbent must understand and utilize knowledge of organizational politics and fundamental organizational structure in order to be effective. Examples include funding sources, staff recruitment, staff retention, staff motivation, delegation of authority and responsibility, budgeting, and external relations.
- Questions that indicate the level of organizational or business knowledge required for a position include:
 - Does the incumbent execute the job in isolation or through interaction with a user base?
 - Does the position require establishing working relationships with external department staff?
 - If yes, how many and at what level/classification are the staff with whom the incumbent directly interacts?
 - What level of knowledge and understanding of operations and structure is required to do your job effectively?
 - Single department,
 - Multiple departments within one organization
 - Multiple departments within multiple organizations
 - One organization
 - Multiple organizations
 - The entire university

*Relevant PDQ Questions: #9 #23, #25, #36, #37, #41, #42 (incumbent's narrative – #41, supervisor's verification – #42)***

Technical Competencies

- This criterion is a measure of the depth of knowledge, skill, and analytical ability required for the incumbent to work effectively with the hardware and software tools needed to perform the job. **Specificity is important.** Please include details about the types of hardware and software the incumbent uses to perform the job and the level of competency necessary to be successful in this position. Technical levels may range from minimal competency (required to memorize procedures through empirical investigation) to deep technical knowledge and fundamental understanding of hardware and software tools and environments (required in order to develop sound procedures and make effective decisions).
- Metrics for this criterion include the:
 - Level of ability required to comprehend and apply relevant technical material / resources
 - Technical level of the people with which the incumbent regularly interacts, and
 - Amount of time required to stay technically current.

Relevant PDQ Questions: #17, #36, #37

Sphere of Influence

- This criterion is a measure of the incumbent's level of responsibility for the welfare/direction of staff in the context of administrative and/or functional supervision, or as determined by the type and amount of interaction with staff and/or project teams.
- Influence can range from minimal to being fully responsible for determining work/project prioritization, setting strategic direction and/or solving complex problems/issues within the environment for which the incumbent has responsibility and/or authority.

Relevant PDQ Questions: #14, #15, #16, #19, #21, #23, #24, #36, #37

Impact of Errors

- This criterion typically (but at varying degrees) is measured in terms of:
 - Resources (time, staff, and/or equipment),
 - Financial consequence,
 - Legal exposure and/or
 - Damage to credibility/image of the unit (department, organization or enterprise).
- Errors may range from inconsequential to having significant impact on the unit's ability to meet long-term financial and strategic goals
- Provide examples of possible errors, the impact they might have, and who would be affected. Indicate, for example, if the impact is limited to an individual customer, project or department, or if an error in judgment could have impact within the department, across department unit or enterprise-wide.

*Relevant PDQ Questions: #18, #22, #23, #41, #42 (incumbent's narrative – #41, supervisor's verification – #42)***

Characteristic Duties

- Characteristic duties are general indicators of the types of duties a typical incumbent in that job classification is likely to perform on a regular basis. It is not expected that any one incumbent would perform all, or even most, of the characteristic duties in a specific classification.
- In most situations, job responsibilities for an individual position will include several characteristic duties of higher and lower levels within the job family, or even characteristics duties from other job families. When evaluating a position, one must look for the best fit of the types of characteristic duties that represent the core elements of your job responsibilities.
- **Specificity is important.** Include details not only about the activities the incumbent must perform, but also about the tools (for example, specific software titles) needed to perform those activities.

Relevant PDQ Questions: #2, #23, #31-35, #38

Supervision

- This criterion is a measure of the:
 - Incumbent's skill and ability in actual (functional and/or administrative) supervision of other IT and non-IT support staff
 - The number of staff supervised by the incumbent.
- Measured aspects include such qualities as leadership, facilitation, responsibility, creativity, and insight.
- In most IT job families, supervision is not a prerequisite for moving to a higher level within a job family, although it can be weighted as one factor. Supervision of staff is required for positions in the IT Management family.

Relevant PDQ Questions: #14, #15, #16, #24

Knowledge, Skills, and Abilities

- Knowledge, skills, and abilities (KSAs) are characteristic qualities expected of an experienced (fully functioning) incumbent in a given classification.
- In order to effectively evaluate the level at which a position should be placed it is important to know the language(s), and equipment/tools (operating systems, platforms, etc.) that will be (or are) used by the incumbent(s) in the classification. When preparing the specific job description (for a given position) KSAs may serve as additional requirements or desired qualifications. In some cases, certifications or other quantitative measures may denote the desired skill level.

Relevant PDQ Questions: #13, #29, #39

- **PDQ Question #41 will serve as the point on the PDQ to address the impact of the incumbent's errors and to identify staff (external to the department) with whom they regularly interact.**
- **PDQ Question #42 will serve as the point on the PDQ where the supervisor will:**
 - **Verify the incumbent's statement(s) regarding the impact of their errors and the staff (external to the department) with whom they regularly interact**

or

 - **Identify the impact of the incumbent's errors and the staff (external to the department) with whom the incumbent regularly interact.**