

STEP ONE: Perform a job analysis for the position using the outline below.

- A. Review the job responsibilities of current employees in the position. What do they actually do? Get as much detailed information as possible. The best sources of information are current employees in the position and their managers/supervisors.
- B. Analyze the work duties, tasks and responsibilities that the employee doing the job needs to accomplish. Are there any tasks that are not currently getting done in the organization that could reasonably be assigned to this position?
- C. Determine the most important aspects of the position (e.g., producing annual report, planning and coordinating national convention, securing donor support, etc.).
- D. Research what other organizations with similar positions are doing. Look online or within your network for job descriptions or position information from similar organizations or organizations with similar positions.

STEP TWO: Assess whether the position is exempt or non-exempt.

- A. To be exempt from minimum wage and overtime requirements (under most rules), an employee must meet the salary basis (\$455/week, although increasing to ~\$970/week next year) and job duties test. Room and board cannot be counted toward the salary basis.
- B. Exempt job duties refresher (high-level; please seek advice from an attorney if you are unsure whether an employee is properly classified as exempt or non-exempt; if unsure, err on the side of classifying the employee as non-exempt):
 - a. **Executive Exemption (must meet all three requirements)**
 - i. Manages organization or department/subdivision of organization
 - ii. Customarily and regularly directs/supervises the work of two full time employees (or their equivalent)
 - iii. Responsible for personnel decisions (hiring, firing, promotions, reviews) or opinion on these matters is given weight
 - b. **Administrative Exemption**
 - i. Perform office or non-manual work directly related to the management or general business operations of the employer or the employer's clients or customers
 - ii. Must exercise discretion and independent judgment regarding matters of significance. Discretion implies that the employee has the authority to make an independent choice, free from immediate direction or supervision.
 - c. **Creative Professional Exemption**
 - i. Performing work requiring invention, imagination, originality or talent in a recognized field of artistic or creative endeavor (e.g., music, writing, acting, graphic and three-dimensional art and design). Exemption depends on the extent of the invention, imagination, originality, or talent exercised.
 - d. **Computer Employee Exemption**
 - i. Systems analysis, including consulting with users, to determine hardware, software or system functional specifications or
 - ii. Designing, creating, testing or modifying computer systems or programs based upon user or system specifications or

- iii. A combination of these duties
 - iv. Does not include employees providing help desk or troubleshooting type services, those who install hardware/software, configure desktops, etc.
- e. Highly-Compensated Employee Exemption**
- i. Total annual compensation must be at least \$100,000 (increasing to ~\$130,000 next year)
 - ii. Must customarily and regularly perform at least ONE of the duties of an exempt executive, administrative or professional employee
- C. If the job does not meet the exempt requirements the employee should be considered classified as non-exempt. Non-exempt employees must track their hours and be paid overtime for all hours worked over 40 in a week (or daily overtime in certain states).

STEP THREE: Draft a job description using the template below.

A. Organization summary

- 1. Provide a short summary of your organization, its mission, etc.

B. Position description

- 1. Title
- 2. Supervisor/reports to title
- 3. Unit/department
- 4. Short description of the purpose and primary objectives of the position

C. Duties and responsibilities

- 1. List each essential duty/responsibility that the job holder must be able to perform satisfactorily to do the job successfully. Consider listing main duties/responsibilities followed by more specific statements of what those duties/responsibilities entail. Depending on the position, it may make sense to break the duties/responsibilities into sections (e.g., Operations Management, etc.)
- 2. Duties/responsibilities should match what the employee will actually be expected to do.
- 3. Do not include conduct-related
- 4. Think carefully about the language used to describe a duty or responsibility of the position.
 - i. For exempt positions, ensure that the descriptions of the duties and responsibilities reflect the qualities of the position that qualify it as exempt. NOTE: Below are just examples, and the words used do not dictate exemption status; if you are unsure whether an employee (or position) qualifies as exempt, consult legal counsel.
 - 1. Terms that might describe an exempt position include:
 - a. Manages, supervises, designs, plans, establishes, oversees, directs, develops, recruits, trains, analyzes, counsels, administers
 - 2. Terms that might describe a non-exempt position as they do not convey independent discretion:
 - a. Assists, coordinates, helps, data entry, responds, attends, participates
 - ii. Saying “Responsible for planning and coordinating X, Y and Z” is much stronger than saying “Plans and coordinates X, Y and Z” – in the second example, the employee could just be a small part of a team, whereas the first example implies the employees is in charge of the planning and coordination efforts.
- 5. Review to ensure that the duties and responsibilities accurately reflect and represent the most important aspects of the position.

D. Minimum Knowledge, Skills and Abilities Required:

1. State the minimum qualifications required to successfully perform the job. These are the qualifications that are necessary for someone to be considered for the position. Qualifications may include:
 - i. Education level required / preferred
 - ii. Specialized knowledge/Skills/Abilities
 1. Examples: Strong written and verbal communication skills, strong customer service skills, strong analytical skills, computer language skills
 - iii. Other characteristics
 1. Examples: Self-motivated, works well with a team, dependable, works well under pressure, able to independently set and meet goals and objectives, problem solver, creative thinker
 - iv. Professional Certification / License required (if applicable)
 - v. Experience
 1. Type
 2. Years
 - vi. Status as alumnus/alumna of the organization (if required)

E. Working conditions: Describe the working conditions for the position (e.g., regular evening and weekend work, shift work, working outdoors, working with challenging clients, normal office environment, travel required (approximately x% of time), overnight travel required).

F. Physical requirements: List the physical demands of the job, if any (e.g., employee is required to stand for extended periods of time, lift heavy objects on a regular basis, do repetitive tasks with few breaks, extended viewing of computer screens).

G. Disclaimer along the lines of the following: All of the above duties and responsibilities are essential job functions for which reasonable accommodation will be made, unless an accommodation would impose an undue hardship on the organization. All job requirements listed indicate the minimum level of knowledge, skills and/or ability deemed necessary to perform the job proficiently. This position description is not to be construed as an exhaustive statement of duties, responsibilities or requirements. Employees may be required to perform any other job-related instructions as requested by their supervisor, subject to reasonable accommodation provided such reasonable accommodation would not impose an undue hardship on the organization.

H. EEO Statement: This paragraph should be included in all job postings.

1. [Organization name] provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, national origin, age, disability or genetics. In addition to federal law requirements, [Organization name] complies with applicable state and local laws governing nondiscrimination in employment in every location in which the company has facilities. This policy applies to all terms and conditions of employment, including recruiting, hiring, placement, promotion, termination, layoff, recall, transfer, leaves of absence, compensation and training.

I. Date last modified

STEP FOUR: Review the job description periodically and ensure it accurately reflects what the employee is actually doing. The job description can also be useful for performance evaluations.