

**UNIVERSITY OF PENNSYLVANIA
HUMAN RESOURCES/COMPENSATION
POSITION INFORMATION QUESTIONNAIRE SHORT FORM**

☐ Check if new position is being created

Date: _____

Job Title: _____

Employee Name: _____

Business Title: _____

Penn ID: _____

School/Center: Wharton

Supervisor's Name: _____

Department: _____

Supervisor's Title: _____

POSITION SUMMARY: In a few sentences, briefly describe the primary function and purpose of the position.

PRINCIPAL POSITION RESPONSIBILITIES/DUTIES: List up to ten major tasks starting with the most important for which the position is responsible. Include the estimated % of time spent on performing the task, with no task more than 50%. Place a check in the Essential Function column to designate an essential function of the job. At least 50% of the job must be designated “Essential”.

	RESPONSIBILITIES/DUTIES	Estimated % of Time	Essential Function
1			☐
2			☐
3			☐
4			☐
5			☐
6			☐
7			☐
8			☐
9			☐
10			
Duties/Responsibilities must equal 100%. Total Essential Functions must be at least 50%			

Identify any of the above listed tasks that were added in the last year by listing the related numbers:

JOB EVALUATION FACTORS: Listed below are job evaluation factors. Check the single best answer that applies

Q1 – Formal Education (minimum education required)

1	☐ H.S. Diploma or GED preferred	5	☐ Bachelor's Degree required <i>Major (optional)</i> _____
2	☐ H.S. Diploma or GED required	6	☐ Master's Degree required <i>Major (optional)</i> _____
3	☐ Vocational or Technical School required	7	☐ M.D., Ph.D., Law Degree or equivalent doctoral degree required
4	☐ Associate's Degree or Two Year College equivalent required		

Q2 – Minimum Experience (minimum experience required)

1	☐ 0 to 1 year	3	☐ 2 to 3 years	5	☐ 5 to 7 years	7	☐ Over 10 years
2	☐ 1 to 2 years	4	☐ 3 to 5 years	6	☐ 7 to 10 years		

Q3a – Planning Scope (highest level of planning required)

1	☐ Daily	3	☐ One to Four Weeks	5	☐ Four to Twelve Months	7	☐ Three Years or More
2	☐ Current Week	4	☐ One to Three Months	6	☐ One to Three Years		

Q3b – Planning Level (level of primary scope of planning)

1	☐ Individual (position only)	3	☐ Section or equiv. (> 15 faculty & staff)	5	☐ School/Center
2	☐ Unit or equiv. (<15 faculty & staff)	4	☐ Department or equiv. (> 15 faculty & staff)	6	☐ University-wide

Q4a – Impact on Operating Budget

1	☐ None	3	☐ Supportive	5	☐ Controlling
2	☐ Incidental	4	☐ Recommending	6	☐ Delegating

Approximate Size of Budget:

Q4b – Impact on Grant Funds

1	☐ None	3	☐ Supportive	5	☐ Controlling
2	☐ Incidental	4	☐ Recommending	6	☐ Delegating

Approximate Size of Budget:

Q4c – Impact on Revenue Generating

1	☐ None	3	☐ Supportive	5	☐ Major impact
2	☐ Incidental	4	☐ Contributory	6	☐ Directing

Approximate Size of Budget:

Q5 – Complexity

1	☐ Standardized: duties are few and repetitive	5	☐ Analytic: non-standardized and widely varied work
2	☐ Routine: routine tasks, processes, or operations	6	☐ Highly Complex: broad in scope covering one or more complicated areas
3	☐ Basic: moderately complex procedures and tasks	7	☐ Multifaceted: broad in scope covering the entire University's operations
4	☐ Varied: complex and varied work		

Q6 – Decision Making (level of direction & supervision)

1	☐ Standardized: little independent judgment required	5	☐ Analytic: establish and review broad objectives relative to duties/responsibilities
2	☐ Routine: limited opportunity for independent judgment	6	☐ Highly Complex: review established objectives/recommend department/school objectives
3	☐ Basic: provided on an as-needed basis; some independent judgment necessary	7	☐ Multifaceted: review and approve major recommendations; establish procedures
4	☐ Varied: establish general objectives relative to project; independent judgment required		

Q7 – Problem Solving (typical level encountered over extensive period of time)

1	☐ Problems solved by reporting them to a supervisor	5	☐ Problem solving involves identification and analysis of diverse problems
2	☐ Problems solved by talking with a supervisor	6	☐ Problems are complex, varied and only mildly related to those seen before
3	☐ Solutions found by selecting from specific choices defined in standard work policies	7	☐ Problem solving requires understanding and evaluation of impact upon the University
4	☐ Solutions found by using methods chosen before in similar situations		

Q8a – Internal Contacts

1	☐ Little or no contact	5	☐ Regular contact to carry out programs; continuing contacts with officials at higher levels
2	☐ Regular contact within department & periodic contact with other departments	6	☐ Regular contact with internal persons of importance and influence
3	☐ Regular contact within department & with other departments; supplying information	7	☐ Continuing contacts involving difficult formal negotiations
4	☐ Regular contact to carry out programs; occasionally with officials at higher levels		

Q8b – External Contacts

1	☐ External communication with others is minimal	5	☐ Regular external contacts, with continuing personal contact to enforce policies
2	☐ Occasional contact with outside agencies & general public supplying information	6	☐ Regular contact with external persons of importance and influence
3	☐ Regular contact with outside agencies & general public supplying/seeking information	7	☐ Continuing external contacts involving difficult formal negotiations
4	☐ Regular external contacts to explain specialized matters, occasionally to enforce policies		

Q9A – Will this position have supervisory responsibility over staff?☐ Yes☐ NoNo. of Direct Reports No. of Indirect Reports **Q9b – Will this position have supervisory responsibility over other non-staff (e.g. students, temporary workers)?**☐ Yes☐ NoNo. of Direct Reports No. of Indirect Reports **Q9c – Supervisory Responsibility**

- 1 ☐ No responsibility or authority for direction of others
- 2 ☐ Authority limited to direction of student &/or temporary workers
- 3 ☐ Orient/train others; may act in a lead capacity
- 4 ☐ Provide limited supervision for one or more functions within a department (functional)

- 5 ☐ Make recommendations re: HR issues; plan/assign/evaluate work of staff (bonafide)
- 6 ☐ Supervise multiple functions, with full responsibility for effective operation & results
- 7 ☐ Overall responsibility to provide direction and guidance for Penn

Number of Direct Reports Number of Indirect Reports **Q10 – Job-Related Knowledge (knowledge and skill required to perform job)**

- 1 ☐ Basic Skills
- 2 ☐ Intermediate Skills
- 3 ☐ Advanced Skills
- 4 ☐ Formal Technical Skills

- 5 ☐ Entry Professional Skills
- 6 ☐ Advanced Professional Skills
- 7 ☐ Multiple Professional Skills/External Expert

Q11 – Innovation/Creativity (degree job requires developing/improving procedures, policies, systems, etc.)

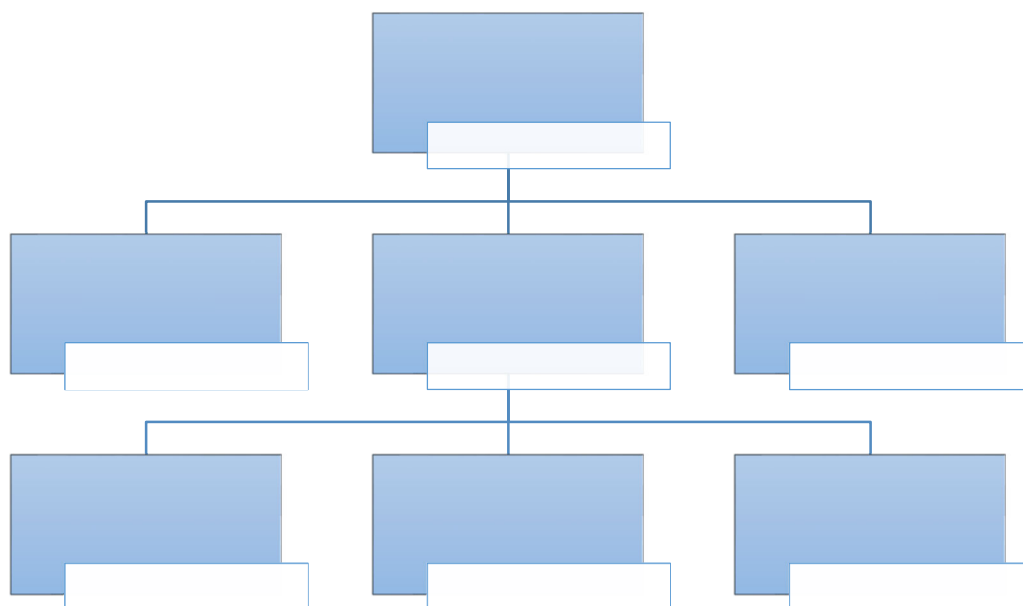
- 1 ☐ Opportunities for innovations are rare
- 2 ☐ Improved methods affect the immediate department
- 3 ☐ Improved methods affect delivery of service to selected customer or students
- 4 ☐ Results impact several work groups, a large project or an extended customer base

- 5 ☐ Results generally affect a school/center within the University
- 6 ☐ Results generally affect several schools/centers
- 7 ☐ Results generally affect the University as a whole; impact competitive position

Is this an Essential Position?

Essential employees are defined as workers who support the University's critical operations (e.g. Public Safety, Dining Services, and Facilities and Real Estate Services). Positions outside of these schools, centers, or offices may also be considered essential if the position is deemed necessary for the University to continue operating. Essential workers may also support certain academic operations.

Staff members who provide essential services are expected to continue working if the closing occurs during their regular work schedule. If the closing announcement is made before their regular work schedule begins, they are still expected to report to work.

ORGANIZATION CHART Use staff member names and position titles**WORKING CONDITIONS/PHYSICAL EFFORT/RESOURCE EXPOSURE**

Instructions: Please select at least one box from each section.

Working Conditions

- | | | |
|--|---|---|
| ☐ Office, library, computer room | ☐ Requires extensive safety training | ☐ Exposure to chemicals |
| ☐ Stockroom or warehouse | ☐ Alternative work schedules | ☐ Outdoor exposure to weather |
| ☐ High noise environment | ☐ On-Call (beeper) | ☐ Requires protective devices |
| ☐ High dust, dirt, grease environment | ☐ Exposure to moving machinery | ☐ Extensive travel (>1000 mi./month) |

Physical Effort

- | | | |
|---|---|---|
| ☐ Typically sitting at a desk or table | ☐ Occasional lifting 25 lbs. or less | ☐ Typically running, climbing |
| ☐ Typically standing or walking | ☐ Occasional lifting 25-50 lbs. | ☐ Climbing ladders/scaffolds |
| ☐ Intermittently sitting/standing/stooping | ☐ Frequent lifting 25 lbs. or more | ☐ Using tools requiring high dexterity |
| ☐ Typically bending, crouching, stooping | | |

Is continuation of this position dependent upon any type of grant funding?

Yes

No

Remote Work

- | | | |
|--|--|--|
| ☐ Fully-onsite | ☐ Hybrid eligible | ☐ Remote eligible |
| ☐ Remote required | | |

Resource Exposure

- | | |
|---|---|
| ☐ Handle credit cards (customer cards, Purchasing Card, or PennCards) | ☐ Handle controlled substances such as pharmaceutical, radiological or hazardous materials |
| ☐ Purchase supplies or material for the department/organization | ☐ Have broad access to University buildings (keys/PennCard, locksmith, custodian, etc.) |
| ☐ Have financial control of or access to budgets, resources, salaries, or other sensitive data | ☐ Work with children under the age of 18 or elders |
| ☐ Have access to private information such as SSN, credit card, personal data, or financial data for students, alumni, staff or faculty | ☐ Live in a University residence/student dormitory |
| ☐ Have access to sensitive data related to research projects and grants such as intellectual property (not HIPPA information) | ☐ Operate a University vehicle or drive a vehicle on University business |
| ☐ Be involved with patient/animal care | ☐ Background check is required by Federal, State, or local regulations or external regulatory agency |
| ☐ Have control of or manage grant funds | |

☐ None of the Above

Competencies

- | <i>Understanding The Business</i> | <i>Taking Initiative</i> | <i>Building Relationships</i> | <i>Being Authentic</i> |
|--|---|--|--|
| ☐ Business Insight | ☐ Action Oriented | ☐ Collaborates | ☐ Courage |
| ☐ Customer Focus | ☐ Resourcefulness | ☐ Manages Conflict | ☐ Instills Trust |
| ☐ Financial Acumen | <i>Managing Execution</i> | ☐ Interpersonal Savvy | <i>Being Open</i> |
| ☐ Tech Savvy | ☐ Directs Work | ☐ Builds Networks | ☐ Demonstrates Self-Awareness |
| <i>Making Complex Decisions</i> | ☐ Plans and Aligns | <i>Optimizes Talent</i> | ☐ Self-Development |
| ☐ Manages Complexity | ☐ Optimizes Work Processes | ☐ Attracts Top Talent | <i>Being Flexible & Adaptable</i> |
| ☐ Decision Quality | <i>Focusing on Performance</i> | ☐ Develops Talent | ☐ Manages Ambiguity |
| ☐ Balances Stakeholders | ☐ Ensures Accountability | ☐ Respects Others | ☐ Nimble Learning |
| <i>Creating the New and Different</i> | ☐ Drives Results | ☐ Builds Effective Teams | ☐ Being Resilient |
| ☐ Drives Results | | <i>Focusing on Performance</i> | ☐ Situational Adaptability |
| ☐ Global Perspective | | ☐ Communicates Effectively | |
| ☐ Cultivates Innovation | | ☐ Drives Engagement | |
| | | ☐ Organizational Savvy | |
| | | ☐ Persuades | |
| | | ☐ Drives Vision and Purpose | |

* Penn Core Competencies are required and pre-checked. Additional competencies default in Workday based on the job family. Brief definitions are available on the HR website.

Training(s): _____

☐ Required

I confirm that the information contained on this form is correct and accurately represents the responsibilities of the position.

Employee's Signature: _____ Date: _____

Employee's Name: _____

Supervisor's Signature: _____ Date: _____

Supervisor's Name: _____

Supervisor's Title: _____

Department Head's Signature: _____ Date: _____

Department Head's Name _____

Department Head's Title: _____

POSTING INFORMATION: *(TO BE COMPLETED ONLY IF POSITION IS TO BE POSTED)*

Write summary of position for posting purposes.

Duties (Description should be brief and only include principal details)

Qualifications (Qualifications should clearly indicate those that are required and those that are preferred)

Supervisor's signature _____

Date: _____