

**UNIVERSITY OF PENNSYLVANIA  
HUMAN RESOURCES/COMPENSATION  
MANAGERIAL  
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  |                         |                     | <input type="checkbox"/> |
| 2  |                         |                     | <input type="checkbox"/> |
| 3  |                         |                     | <input type="checkbox"/> |
| 4  |                         |                     | <input type="checkbox"/> |
| 5  |                         |                     | <input type="checkbox"/> |
| 6  |                         |                     | <input type="checkbox"/> |
| 7  |                         |                     | <input type="checkbox"/> |
| 8  |                         |                     | <input type="checkbox"/> |
| 9  |                         |                     | <input type="checkbox"/> |
| 10   |                         |                     |                          |
| <b>Duties/Responsibilities must equal 100%. Total Essential Functions must be at least 50%</b> |                         |                     |                          |

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  | <input type="radio"/> H.S. Diploma or GED preferred                              | 5 | <input type="radio"/> Bachelor’s Degree required<br><i>Major (optional)</i> _____    |
| 2  | <input type="radio"/> H.S. Diploma or GED required                               | 6 | <input type="radio"/> Master’s Degree required<br><i>Major (optional)</i> _____      |
| 3  | <input type="radio"/> Vocational or Technical School required                    | 7 | <input type="radio"/> M.D., Ph.D., Law Degree or equivalent doctoral degree required |
| 4  | <input type="radio"/> Associate’s Degree or Two Year College equivalent required |   |  |

| Q2 – Minimum Experience (minimum experience required) |                                    |   |                                    |   |                                     |   |                                     |
|---|------------------------------------|---|------------------------------------|---|-------------------------------------|---|-------------------------------------|
| 1   | <input type="radio"/> 0 to 1 year  | 3 | <input type="radio"/> 2 to 3 years | 5 | <input type="radio"/> 5 to 7 years  | 7 | <input type="radio"/> Over 10 years |
| 2   | <input type="radio"/> 1 to 2 years | 4 | <input type="radio"/> 3 to 5 years | 6 | <input type="radio"/> 7 to 10 years |   |                                     |

| Q3a – Planning Scope (highest level of planning required) |                                    |   |   |   |   |   |   |
|---|------------------------------------|---|---|---|---|---|---|
| 1   | <input type="radio"/> Daily        | 3 | <input type="radio"/> One to Four Weeks   | 5 | <input type="radio"/> Four to Twelve Months | 7 | <input type="radio"/> Three Years or More |
| 2   | <input type="radio"/> Current Week | 4 | <input type="radio"/> One to Three Months | 6 | <input type="radio"/> One to Three Years    |   |   |

| Q3b – Planning Level (level of primary scope of planning) |  |   |   |   |                                       |
|---|--|---|---|---|---------------------------------------|
| 1   | <input type="radio"/> Individual (position only)           | 3 | <input type="radio"/> Section or equiv. (> 15 faculty & staff)    | 5 | <input type="radio"/> School/Center   |
| 2   | <input type="radio"/> Unit or equiv. (<15 faculty & staff) | 4 | <input type="radio"/> Department or equiv. (> 15 faculty & staff) | 6 | <input type="radio"/> University-wide |

| Q4a – Impact on Operating Budget |                                  |   |                                    |   |                                   |
|----------------------------------|----------------------------------|---|------------------------------------|---|-----------------------------------|
| 1                                | <input type="radio"/> None       | 3 | <input type="radio"/> Supportive   | 5 | <input type="radio"/> Controlling |
| 2                                | <input type="radio"/> Incidental | 4 | <input type="radio"/> Recommending | 6 | <input type="radio"/> Delegating  |
| Approximate Size of Budget:      |                                  |   |                                    |   |                                   |

| Q4b – Impact on Grant Funds |                                  |   |                                    |   |                                   |
|-----------------------------|----------------------------------|---|------------------------------------|---|-----------------------------------|
| 1                           | <input type="radio"/> None       | 3 | <input type="radio"/> Supportive   | 5 | <input type="radio"/> Controlling |
| 2                           | <input type="radio"/> Incidental | 4 | <input type="radio"/> Recommending | 6 | <input type="radio"/> Delegating  |
| Approximate Size of Budget: |                                  |   |                                    |   |                                   |

| Q4c – Impact on Revenue Generating |                                  |   |                                    |   |                                    |
|------------------------------------|----------------------------------|---|------------------------------------|---|------------------------------------|
| 1                                  | <input type="radio"/> None       | 3 | <input type="radio"/> Supportive   | 5 | <input type="radio"/> Major impact |
| 2                                  | <input type="radio"/> Incidental | 4 | <input type="radio"/> Contributory | 6 | <input type="radio"/> Directing    |
| Approximate Size of Budget:        |                                  |   |                                    |   |                                    |

**Q5 – Complexity**

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

**Q6 – Decision Making (level of direction & supervision)**

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

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

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

**Q8a – Internal Contacts**

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

**Q8b – External Contacts**

|   |  |   |   |
|---|--|---|---|
| 1 | <input type="radio"/> External communication with others is minimal  | 5 | <input type="radio"/> Regular external contacts, with continuing personal contact to enforce policies |
| 2 | <input type="radio"/> Occasional contact with outside agencies & general public supplying information            | 6 | <input type="radio"/> Regular contact with external persons of importance and influence               |
| 3 | <input type="radio"/> Regular contact with outside agencies & general public supplying/seeking information       | 7 | <input type="radio"/> Continuing external contacts involving difficult formal negotiations            |
| 4 | <input type="radio"/> 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

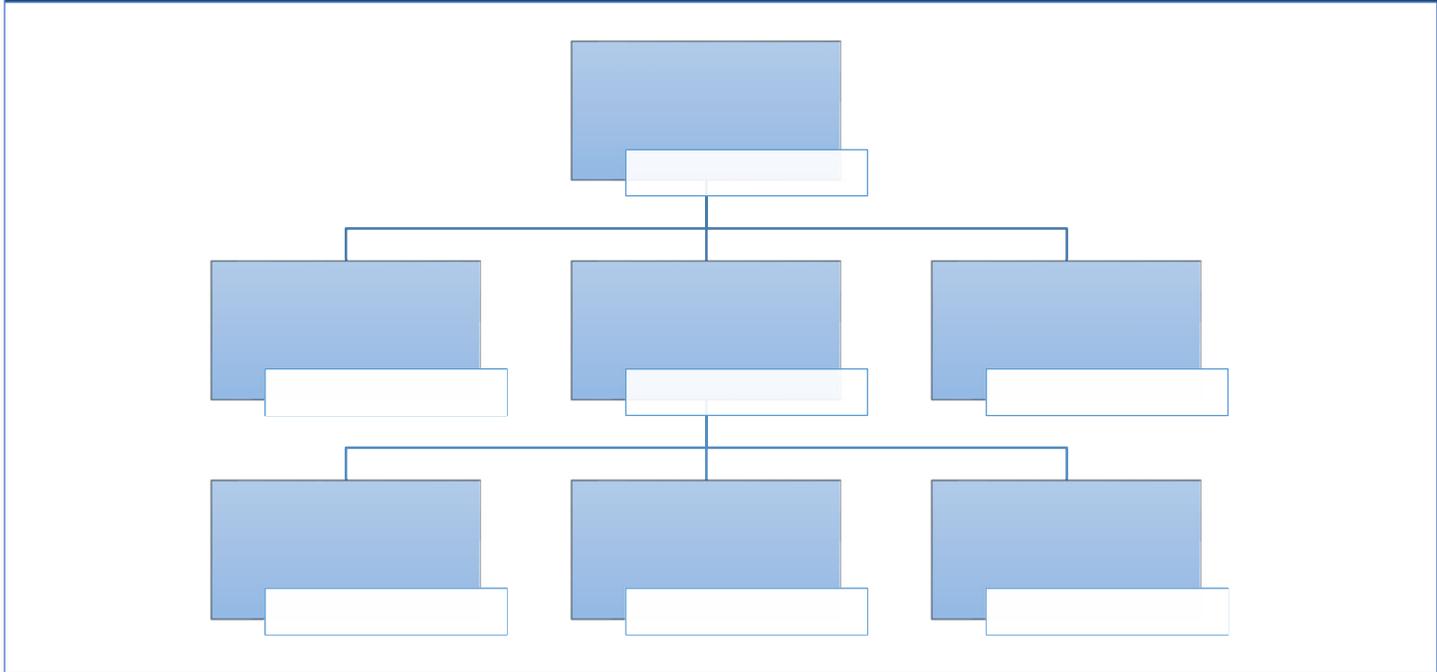
- 5  Results generally affect a school/center within the University
- 6  Results generally affect several schools/centers
- 7  Results generally affect the University as a whole; impact competitive position

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

| Physical Effort   |   |   |
|---|---|---|
| <input type="checkbox"/> Typically sitting at a desk or table     | <input type="checkbox"/> Occasional lifting 25 lbs. or less | <input type="checkbox"/> Typically running, climbing          |
| <input type="checkbox"/> Typically standing or walking            | <input type="checkbox"/> Occasional lifting 25-50 lbs.      | <input type="checkbox"/> Climbing ladders/scaffolds           |
| <input type="checkbox"/> Intermittently sitting/standing/stooping | <input type="checkbox"/> Frequent lifting 25 lbs. or more   | <input type="checkbox"/> Using tools requiring high dexterity |
| <input type="checkbox"/> Typically bending, crouching, stooping   |   |   |

| Is continuation of this position dependent upon any type of grant funding? |                             |
|--|-----------------------------|
| <input type="checkbox"/> Yes   | <input type="checkbox"/> No |

| Remote Work                              |  |  |
|--|--|--|
| <input type="checkbox"/> Fully-onsite    | <input type="checkbox"/> Hybrid eligible | <input type="checkbox"/> Remote eligible |
| <input type="checkbox"/> Remote required |  |  |

## Resource Exposure

- |   |   |
|---|---|
| <input type="checkbox"/> Handle credit cards (customer cards, Purchasing Card, or PennCards)  | <input type="checkbox"/> Handle controlled substances such as pharmaceutical, radiological or hazardous materials           |
| <input type="checkbox"/> Purchase supplies or material for the department/organization  | <input type="checkbox"/> Have broad access to University buildings (keys/PennCard, locksmith, custodian, etc.)              |
| <input type="checkbox"/> Have financial control of or access to budgets, resources, salaries, or other sensitive data   | <input type="checkbox"/> Work with children under the age of 18 or elders   |
| <input type="checkbox"/> Have access to private information such as SSN, credit card, personal data, or financial data for students, alumni, staff or faculty | <input type="checkbox"/> Live in a University residence/student dormitory   |
| <input type="checkbox"/> Have access to sensitive data related to research projects and grants such as intellectual property (not HIPPA information)          | <input type="checkbox"/> Operate a University vehicle or drive a vehicle on University business                             |
| <input type="checkbox"/> Be involved with patient/animal care   | <input type="checkbox"/> Background check is required by Federal, State, or local regulations or external regulatory agency |
| <input type="checkbox"/> 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>                               |
|--|---|--|--|
| <input type="checkbox"/> Business Insight  | <input type="checkbox"/> Action Oriented          | <input type="checkbox"/> Collaborates              | <input type="checkbox"/> Courage                     |
| <input type="checkbox"/> Customer Focus  | <input type="checkbox"/> Resourcefulness          | <input type="checkbox"/> Manages Conflict          | <input type="checkbox"/> Instills Trust              |
| <input type="checkbox"/> Financial Acumen  | <b><i>Managing Execution</i></b>                  | <input type="checkbox"/> Interpersonal Savvy       | <b><i>Being Open</i></b>                             |
| <input type="checkbox"/> Tech Savvy  | <input type="checkbox"/> Directs Work             | <input type="checkbox"/> Builds Networks           | <input type="checkbox"/> Demonstrates Self-Awareness |
| <b><i>Making Complex Decisions</i></b>   | <input type="checkbox"/> Plans and Aligns         | <b><i>Optimizes Talent</i></b>                     | <input type="checkbox"/> Self-Development            |
| <input type="checkbox"/> Manages Complexity  | <input type="checkbox"/> Optimizes Work Processes | <input type="checkbox"/> Attracts Top Talent       | <b><i>Being Flexible &amp; Adaptable</i></b>         |
| <input type="checkbox"/> Decision Quality  | <b><i>Focusing on Performance</i></b>             | <input type="checkbox"/> Develops Talent           | <input type="checkbox"/> Manages Ambiguity           |
| <input type="checkbox"/> Balances Stakeholders   | <input type="checkbox"/> Ensures Accountability   | <input type="checkbox"/> Respects Others           | <input type="checkbox"/> Nimble Learning             |
| <b><i>Creating the New and Different</i></b>   | <input type="checkbox"/> Drives Results           | <input type="checkbox"/> Builds Effective Teams    | <input type="checkbox"/> Being Resilient             |
| <input type="checkbox"/> Drives Results  |   | <b><i>Focusing on Performance</i></b>              | <input type="checkbox"/> Situational Adaptability    |
| <input type="checkbox"/> Global Perspective  |   | <input type="checkbox"/> Communicates Effectively  |  |
| <input type="checkbox"/> Cultivates Innovation   |   | <input type="checkbox"/> Drives Engagement         |  |
|  |   | <input type="checkbox"/> Organizational Savvy      |  |
|  |   | <input type="checkbox"/> Persuades                 |  |
|  |   | <input type="checkbox"/> Drives Vision and Purpose |  |
| <p>* 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.</p> |   |  |  |

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: \_\_\_\_\_