Are Your Job Descriptions Hurting You or Helping You?

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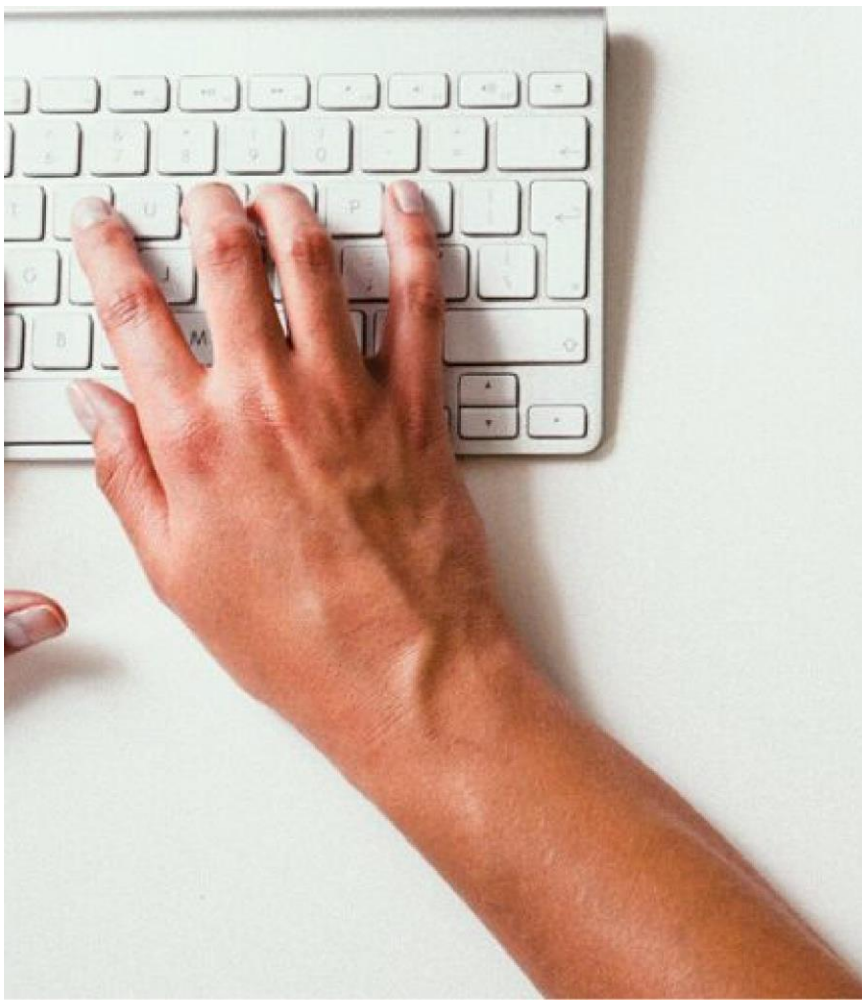

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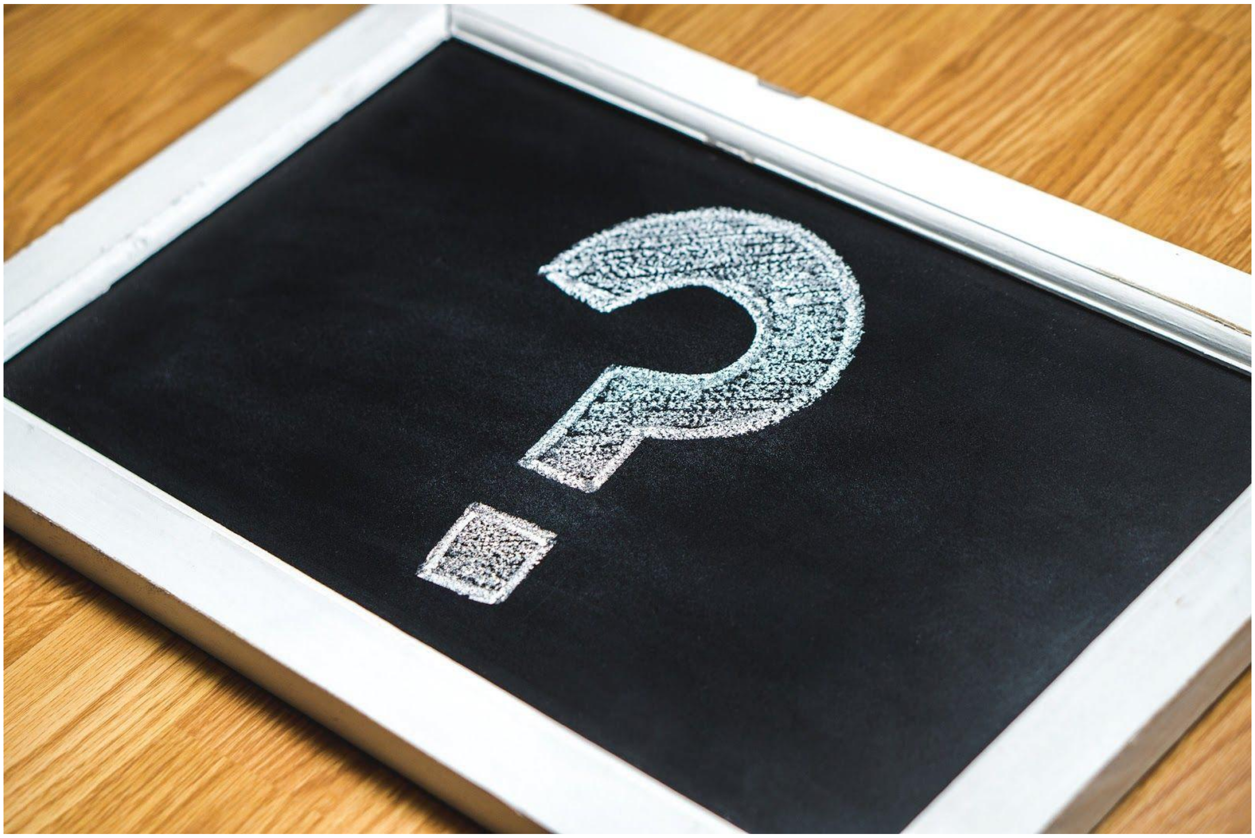
Why Job Descriptions Matter?



Job descriptions are a common HR tool, but their value is often underestimated! Even if they exist, they are often out of date or filed away - never to be seen again. In reality, leveraging effective job descriptions is extremely beneficial for any organization.

Benefits include:

Increased engagement of employees: When employees understand their priorities and expectations, they are more likely to feel engaged. There is nothing worse than working hard only to find out you were focused on the wrong priorities!

Improved communication and efficiency: Well written, accurate job descriptions show the link between roles and departments. They help identify the scope of responsibility and decision-making authority.

Increased effectiveness of coaching conversations: Job descriptions play several roles in coaching conversations between an employee and manager. It ensures alignment on the key responsibilities. It also allows employees to see other job descriptions in the organization and may help set the course for future development opportunities.

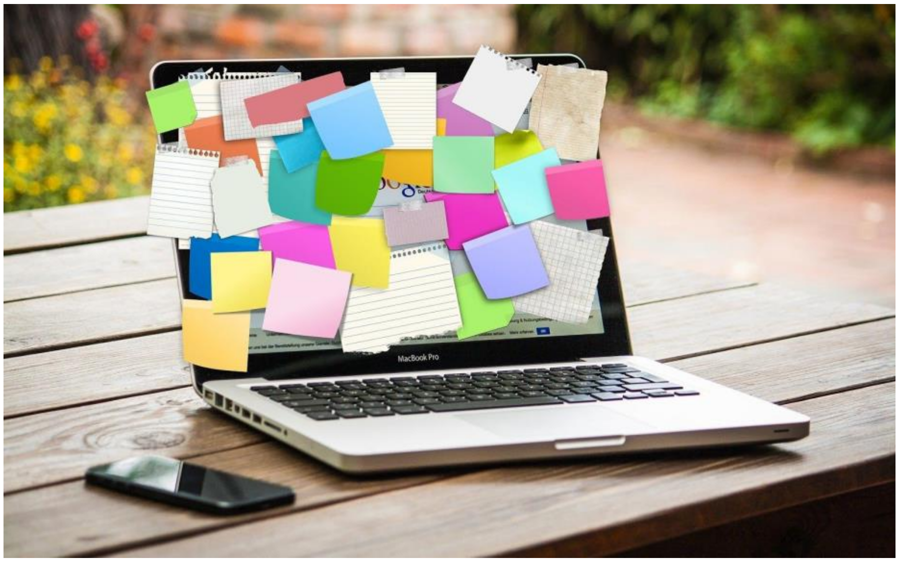
Improved new hire experience: When new hires receive an accurate, well-written job description within their first few days, it tells them you will provide all the tools necessary for their success. The first few months on a new job are stressful enough – not knowing whether you understand what you are responsible for does not ease an employee's mind!

Compliance with employment laws: Regardless of the company size, every employer has some legal requirements that must be met. The job descriptions include information that supports decisions related to many of these requirements.

Unfortunately, many job descriptions fail to deliver these benefits. Why?

Job descriptions that are out of date, or only written for compliance purposes, may not bring about the organizational changes you are trying to achieve. For this HR tool to be truly effective we must ensure that these 5 key criteria are met!

Tip #1: Avoid the Task List



All too often a job description consists of a list of 50 tasks an employee must complete. Unfortunately, this approach does not provide the benefits this tool intends. Instead, a useful job description starts by defining the 3-5 major priorities for the role. We certainly include details that further define the tasks within these priorities, but the focus starts with the high-level outcomes that tie to success in the role.

Sample Key Priorities for Tax Accountant:

- Prepares and files business tax return documents for clients.
- Manages bookkeeping for various clients.
- Develops and maintains relationships with clients.
- Oversees client payroll processing.

By simplifying the responsibilities into 3-5 key priorities, you help employees and managers align on the most important focus areas for the role. You can't get that from a list of 50 tasks to complete!

Once these major priorities are identified, we list the most important tasks under each area.

Sample for Tax Accountant:

Prepares and files business tax return documents for clients. This work may include, but is not limited to:

- Meeting with the client for the initial intake;
- Reviewing all relevant documentation including the client intake form;
- Completing the tax return;
- Reviewing the final outcome with the client;
- Processing e-filing of the return and sending a paper voucher to the client.

Tip #2: Indicate the Priorities

The goal of a valuable job description is to ensure that a manager and employee are aligned on the most important responsibilities of the job. There are several ways to ensure this happens:

1) Add % of time estimates to each key priority

The percentage of time an employee is expected to spend on any priority area has a significant impact on the scope of the role and the skills needed. Here's an example for a Tax Accountant:

- A Tax Accountant who spends 60% of their time "developing and maintaining relationships with clients" likely owns the day to day relationship with the client and may have a bookkeeper who supports them. They likely need strong customer service skills and the ability to build rapport. They may even have responsibility for generating new client relationships.

- A Tax Accountant who spends 10% of their time "developing and maintaining relationships with clients" likely has a client account manager. They probably focus their time on bookkeeping and have limited contact with the actual client. They will need strong technical accounting skills, but less customer service experience.

Don’t worry about getting the time estimates too precise. You are looking for a general indication of time spent over the period of a year. If it is helpful, think about the percentages relative to one another. For example, if most of the employee’s time is spent on two key priorities than they likely account for a total of 80% of the role – 40% each.

Be sure that your percentages add up to 100%!

While the percentages of time help employees align with the priorities, they also provide important information in situations where an applicant or employee may not be able to perform a function of the role. Whether you are deciding on the feasibility of an accommodation under the Americans’ With Disabilities Act (ADA) or trying to support a partial medical release in a worker’s compensation case, these percentages can be helpful.

Example:

> Sam has a hand injury that is covered under worker’s compensation, but his Doctor is determining whether he may be released to return to work. The key is that Sam cannot type for prolonged periods of time.
>
> The current job description states that 50% of Sam’s responsibilities include entering data into the computer to update client records. The doctor is unlikely to approve Sam’s return to work.
>
> In contrast, the job description states that 5% of Sam’s responsibilities include entering data into the computer to update client records. The doctor is likely to approve Sam’s return to work.
>
> Having a well-written job description, with percentages of time listed, allows the employee the opportunity to provide the doctor with details that help make decisions regarding work release and light duty responsibilities. This relieves stress for the employee and ultimately saves you time and money in these scenarios.

2) Write the priorities in order of importance

   By listing the priorities in order of importance, we help employees understand which areas are the most critical.

Tip #3: Scrutinize Your Requirements

All too often, we add minimum requirements to a job description out of habit or assumptions. Does a customer service role really require a college degree?

It is important that you distinguish between minimum requirements and preferred requirements. You also must think about the implications of these requirements. All too often job requirements are based on our assumptions and stereotypes. This has a negative impact on our ability to attract the most diverse and talented individuals for the role.

Here are a few examples of common mistakes made in writing requirements:

1) College degree required

   While this seems like a legitimate requirement, it leaves out many highly qualified individuals. For example, is a military veteran with 4 years of relevant experience less qualified because they may not have a college degree?

   If a college degree in a specific area of expertise is not required, it is highly recommended to change the wording of your minimum requirements. Options include:

   - College degree or relevant work experience required. This includes 4+ years of work or military experience in a similar position.

2) Number of years' experience

We often state "5 years of experience required" because we want someone with stable job history. In reality, you can have 5 years of experience and still not have a stable work history. Instead, requirements focused on years of experience should tie to the level of responsibility or scope of the role. Examples include:

- 1 year of experience – This reflects an entry-level role and likely means you are willing to train an employee from scratch. In this situation, we recommend rewriting the minimum requirement to state "Experience which demonstrates a strong customer service orientation". This allows you flexibility if you find a great, entry-level candidate with only 3 months of experience.
- 2-3 years of experience – This is relevant when you need a candidate to have some prior experience in a comparable role. This designation still indicates that you are willing to train some key priorities of the role, but are expecting a basic level of knowledge in the position.
- 5+ years of experience – This reflects the need for a highly competent candidate who will require little to no technical training. You would expect to train this individual on your specific processes, but they should be fully knowledgeable about the skill set required. In addition, someone with 5+ years of experience is likely serving in a leadership position. At a minimum, they may be viewed as a lead, mentor or coach to others.
- 10+ years of experience – This is a distinction that is typically reserved for leadership level roles or highly technical positions. This is likely a Director level position or Senior Subject Matter Expert in a technical field.

3) Requests for accommodations

As you write your requirements, consider whether you would make an exception or accommodation for your best employee. If the answer is "yes" then you should not list it as a requirement. Here are a few examples:

- Driver's license required – Your receptionist position requires a driver's license because this role is responsible for picking up the mail at the PO box twice a week. Your current receptionist is excellent but gets injured and cannot drive for 6 months. Obviously you would not terminate her from this position based on this injury.

- Ability to stand for extended periods of time – You own a manufacturing company and your employees stand at tables to assemble the product. Your best employee breaks a leg and is unable to stand on their feet for prolonged periods for 6 months. Would you be able to make alternate arrangements such as purchasing a shorter table so they could assemble the product sitting down? If so, you should not add this requirement in the job description.

Tip #4: FLSA Exemption Status

FLSA stands for the Fair Labor Standards Act and is a key law that applies to all employers. The FLSA covers several areas, but most importantly it sets minimum wage and outlines the rules for overtime pay. The overtime pay component is the reason that job descriptions are key to complying with this law.

Here are some key concepts related to FLSA:

Non-exempt employees – Individuals in these roles do not meet the exemption requirements under FLSA. They must be paid overtime for all hours worked over 40 in a workweek.

Exempt employees – Individuals in these roles meet the exemption requirements under FLSA. They are not eligible for overtime pay.

Many employers believe they can simply decide to pay an employee a salary and that qualifies them as non-exempt. This is incorrect!

There is a 3-pronged test to meet the exemption status:

1) The individual must make at least $35,568 per year ($685/week)
2) The individual must be paid salary, not hourly
3) The role must meet the job duties test

The misclassification of the job duties test is the most common mistake made by employers when determining if a role is exempt or non-exempt. There are 7 categories of job duties that allow individuals to be exempt under FLSA.

1) Executive
   - customarily directs the work of **at least 2 or more full-time** employees
   - authority to hire and fire

2) Administrative
   - performance of office or non-manual work
   - exercises discretion and independent judgment w/matters of significance
   - Includes HR professional, Marketing Specialist

3) Professional
   - Work requires advanced knowledge in a field of science or learning
   - Requires prolonged course of specialized instruction
   - Example: Chemist or Professor

4) Creative Professional
   - Work requiring invention, imagination, originality or talent
   - Includes graphic designer, copywriter, website developer

5) Computer employee
   - Works as a computer systems analyst, programmer, software engineer or similar work in the computer field

6) Outside Sales:
   - The primary duty of making sales or obtaining orders
   - Must be regularly engaged away from the office

7) Highly Compensated:
   - Performs office or non-manual work
   - Performs at least one the duties under executive, administrative or professional exemptions
   - Makes a minimum of $107,432

Here is an example of the common mistakes we see in applying the job duties test:

- Suzy is an Office Manager with responsibilities for day to day running of the office. This includes administrative support and bookkeeping responsibilities. However, Suzy does not have any direct reports.

  Many companies would classify Suzy as Exempt under the Administrative or Executive exemption categories. However, she may not meet the Administrative definition of “exercises discretion and independent judgment w/matters of significance”. This requires the authority to make major decisions for the organization such as sign vendor contracts, set policies or make other significant budgetary decisions.

She also does not meet the Executive exemption category because she does not have 2 or more full-time employees reporting directly to her.

A few other job titles that are often misclassified as exempt roles include:

- Help Desk Specialist
- Administrative Assistant
- Receptionist
- Accounts Payable/Receivable Specialists
- Inside Sales Representatives

These roles do not typically meet the requirements outlined in the full definitions of these job duties exemption categories. The details of these exemptions can be tricky! However, we offer a free webinar on the Fair Labor Standards Act, and these exemption categories, at www.peoplesolutionscenter.com.

Given the complex nature of the job duties test, it is crucial that you have well-written job descriptions to help determine whether they meet one of these standards. Again, outlining the major functions of the job and the percentage of time spent doing each part of the role will help guide you on whether the exemption applies.

It is also a best practice to identify the role as exempt or non-exempt at the beginning of the job description. It is also important that you determine exempt status based on the role, not the individual in the role. Everyone within a specific job title should always have the same FLSA status!

Tip #5: Disclaimers and Signatures

While the benefits of job descriptions go beyond legal compliance, there is still great benefit in getting the legal component of these documents correct. Each job description should have a disclaimer that provides the employer the right to make changes or amendments at any time (with or without notice). In addition, you want each employee to sign the job description. This provides verification that the employee received the document.

Be sure your disclaimer and signature statements accurately reflect the current legal advice. You should consult an expert on this piece as the legal practice here changes.

One best practice is to ensure your signature section states, “I acknowledge receipt of this job description and understand that I am responsible for the information contained in it”. This is different from “I have read and understood the information…”

Where the Magic Happens!

When you create job descriptions that become the foundation for great coaching conversations, processes, and team alignment, you find teamwork and collaboration become truly magical!

Here's a bonus tip for you: Visit us at www.peoplesolutionscenter.com to get more information on how to leverage these job descriptions to create better alignment on roles and responsibilities. Look for our HR Tip of the Week video on R.A.C.I. charts!

Now that you have a better understanding of the value of job descriptions and the key issues to consider, it's time to implement! Not sure how to get it all done? People Solutions Center is here to help!

Call us at 314-302-5969 or email us at hr@peoplesolutionscenter.com