



**Pass It On**  
C E N T E R

*... the National AT Reuse Center*

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# Developing Job Descriptions and Performance Evaluations

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## Get CEUs or CRCs

- **CEUs** - Visit the AAC Institute  
[www.aac institute.org](http://www.aac institute.org)
- **CRCs** – To receive your verification form, send an e-mail with your name, organization, city, state and e-mail address to  
[Liz@passitoncenter.org](mailto:Liz@passitoncenter.org)

# Download Work Package

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**Working documents for this Webinar are available at:**

**<http://www.passitoncenter.org/content/>**

**Download the package for  
*Developing Job Descriptions*  
Under “New to the Knowledge Base”**

# Learning Objectives

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**After completing this Webinar, participants should:**

- **Understand the need for job descriptions and performance evaluations**
- **Be able to prepare professional job descriptions using a questionnaire to gather information**
- **Be prepared to use job descriptions to facilitate program performance improvement**
- **Be able to transform the job description into a customized performance evaluation form for the position**

# Two Reuse Program Staffing Models

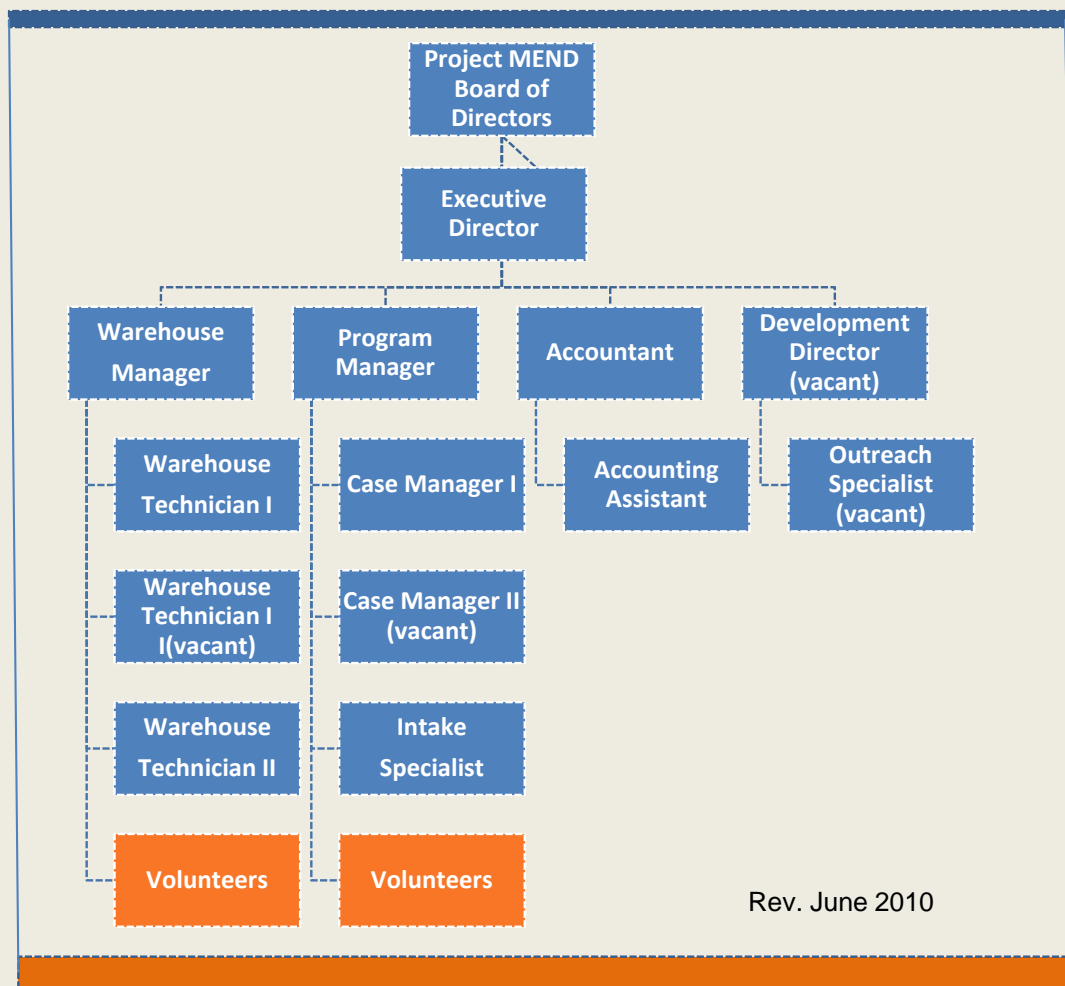
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- **Project MEND**, a nonprofit organization based in San Antonio, TX, provides durable medical equipment and fitted mobility services to a large portion of south Texas.
- **Touch the Future**, a nonprofit organization based in Tucker, GA, provides computers, AT reuse items, durable medical equipment and assistive technology services throughout Georgia (and to other areas in the Southeast through STAR Network)

- **Durable Medical Equipment (DME)** – Provides DME to eligible clients. Donated DME is received, then refurbished, repaired and sanitized prior to distribution to clients.
- **Fitted Mobility (FM)** – Provides financial assistance to eligible clients needing to purchase specialized or fitted devices, such as, orthotics; prostheses; cranial helmets; and other assistive devices necessary for rehabilitation.

# Project MEND Organization Chart

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Rev. June 2010

## CASE MANAGEMENT STAFF

- **Primary responsibility is to take care of clients and their service needs (Case Managers; Program Manager; Intake Specialist)**
- **Schedule clients**
- **Manage clients through entire process of receiving Project MEND services as well as other services they may need**

## WAREHOUSE STAFF

- **Primary responsibility is to prepare DME for distribution to clients (Warehouse Technicians; Bio-Medical Technician; Warehouse Manager)**
- **Sanitize/refurbish/repair DME**
- **Deliver DME to clients' homes**
- **Pick up donated DME**

# Volunteers Provide Key Support

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## WAREHOUSE VOLUNTEERS

- Hand-clean and hand-sanitize medical equipment items
- Complete minor repairs on medical equipment
- Keep warehouse clean and orderly
- Help to maintain grounds and office areas
- Clean out trucks and vans
- Store medical equipment items on racks (no heavy lifting)

## OFFICE VOLUNTEERS

- Provide clerical support to staff
- Answer phones
- Assist clients with paperwork; answer questions

## ATRC

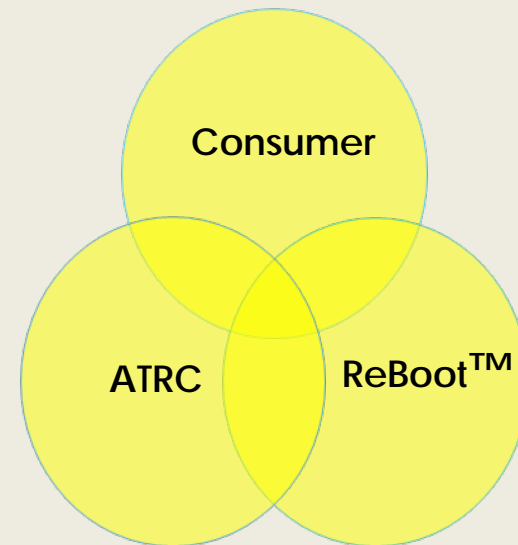
- Information and assistance
- Demonstrations
- Loan library
- Assessment and training
- Products, new and used

## ReBoot™

- Computer refurbishment
- Electronic AT refurbishment
- Other reuse AT
- STAR Network
- Recycling (end-of-life)

## Consumer

Needs, Abilities, Challenges



## Outcomes

Greater Independence  
Education, Work & Community Participation  
Improved Health both Consumer & Environment

## Manpower Resources

|                              |                                          |
|------------------------------|------------------------------------------|
| <b>3 Employees</b>           | <b>= 3.00 FTE's</b>                      |
| <b>2 Office Contractors</b>  | <b>= 1.33 FTE's</b>                      |
| <b>3 ReBoot™ Contractors</b> | <b>= 1.50 FTE's</b>                      |
| <b>3 ATRC Contractors</b>    | <b>= 0.75 FTE's</b>                      |
| <b>Volunteers (average)</b>  | <b>= 1.50 FTE's (13/mo = 250 hrs/mo)</b> |

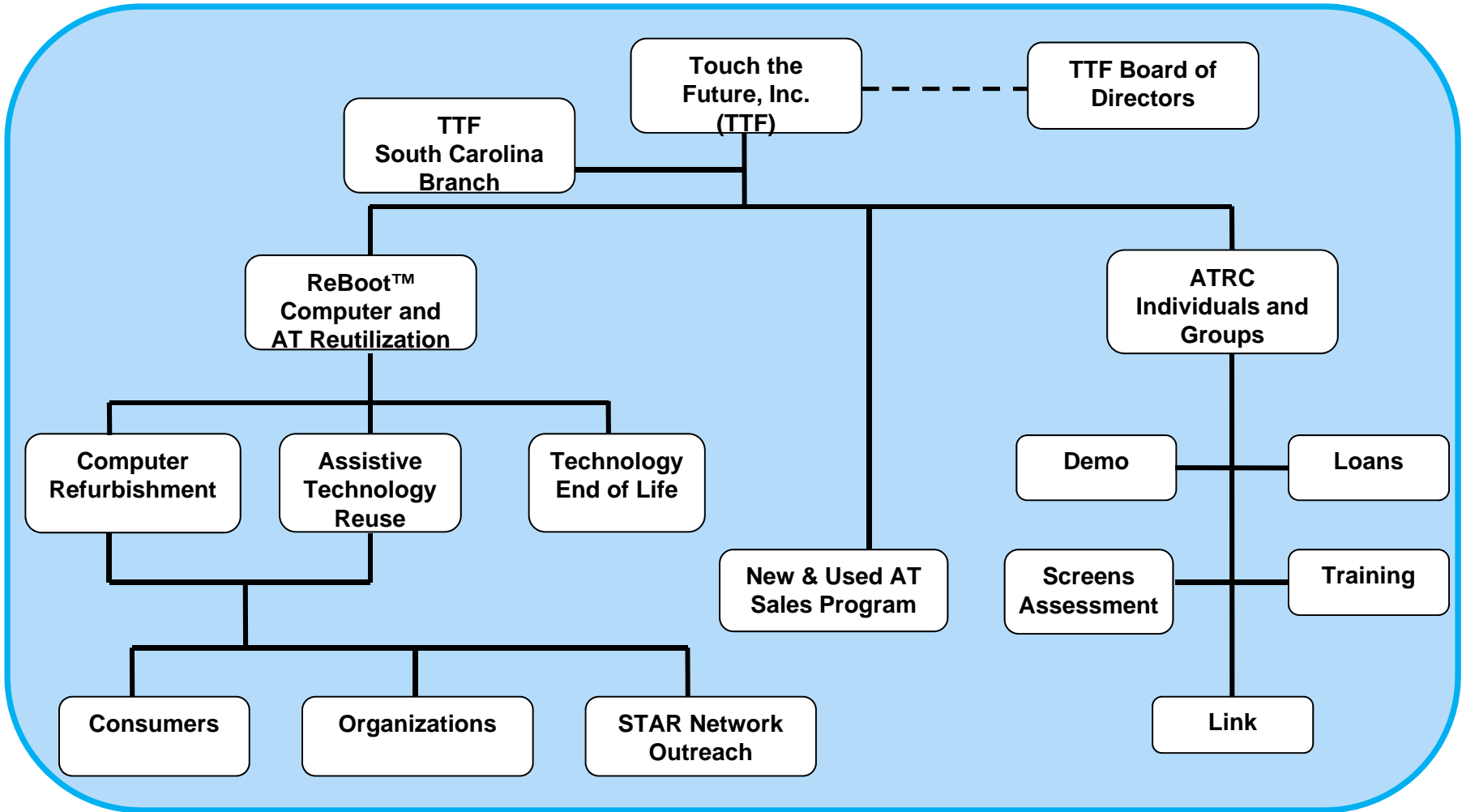


## Staffing Specialties

**Occupational Therapist**  
**Mechanical Engineer**  
**A+ Certified Technicians**  
**Computer Software Educ. Specialists**  
**Recycling Specialist**



# TTF Organization Chart



**Service Demand determines Human Resource Needs**  
**Funding determines Potential and Ability**  
**Marketing supports Services and Funding**

- **Agency Size and Potential**
- **Options – employees, contractors, volunteers**
- **Skills of staff**
- **Environmental availability**
- **Policies & procedures for orienting, training and supervising staff**
- **Safety and legal requirements**
- **Ability to train and supervise**
- **Activities and task assignment capabilities/cross training**
- **Quality assurance measures in place**
- **Availability of product**
- **Funding and sustainability of base and special grant funding**

Facilitate  
staffing  
structure

- Define management structure
- Analyze compensation plan
- Support recruitment

Mitigate  
legal  
risks\*

- Increase awareness of compliance with employment laws
- Develop policies and procedures
- Identify accommodations

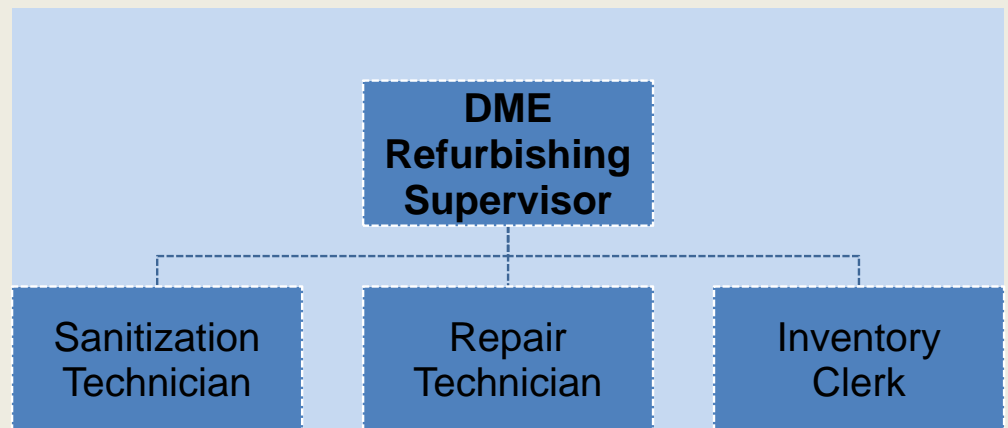
\*Have an attorney or an HR professional review job descriptions

# Define Management Structure

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Job descriptions specify relationships by indicating reporting channels and supervisory responsibilities.

These relationships are displayed visually on organization charts.



# Provide Basis for Compensation Analysis

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**Comprehensive job descriptions permit the comparison of the position to similar jobs in the market, and facilitate determination of “reasonable” compensation.**

- Recruiting qualified workers usually requires salaries comparable to the local job market.
- IRS rules do not permit nonprofits to pay more than *reasonable compensation*.\*

# Assist with Recruiting

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**Accurate job descriptions assist with recruiting by providing specific information that can be used to prepare internal postings for vacancies, online job postings and details to advertise the job.**

**NEEDED: WHEELCHAIR TECHNICIAN**  
Local AT reuse program seeking person experienced in wheelchair repair and refurbishment. Must have good customer service skills and be willing to assist with pickup and delivery of equipment. Apply at

## Mitigate Risk of Violating Employment Laws

**Written job descriptions may help to comply with laws\* concerning:**

- **Nondiscrimination (race, color, religion, sex or national origin)**
- **Equal pay (men and women)**
- **Age discrimination (>40)**
- **Persons with disabilities**
- **Vietnam veterans (if contractor)**

*\*State laws and/or local ordinances may go beyond these federal statutes.*

# How Job Descriptions Mitigate Risk

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- Job descriptions may be used in court to determine whether discrimination occurred (EEOC).
- They may be used to determine if an injured worker was returned to his/her former position (FMLA).
- They may be considered to determine whether an employee qualified as 'exempt' from overtime pay (FLSA).
- Job descriptions may be used to determine whether reasonable accommodations were made (ADA).
- They may be considered in union grievances or in determining who is left out of the bargaining unit.
- They can be used by medical personnel to determine whether an employee returning to work can perform the essential job functions.

# Job Descriptions Clarify Operational Issues:

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- Detail duties and responsibilities
- Specify supervisory and reporting relationships
- Define standards for performance assessment
- Assist in analysis and improvement of program operations

# Detail Duties and Responsibilities

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Job descriptions help administrators clarify the responsibilities to be delegated to each specific position.

This gives a clear picture of the functions of each position in the organization.



## Specify Duties and Expectations

Who is responsible for the key factors in using promising practices?

**Do all key responsibilities appear on someone's job description?**



# Review Indicators of Quality

Use Indicators of Quality list to cross reference responsibilities to job titles in the reuse program.

\*Worksheet in package

Microsoft Excel - IQ Cross Ref to Jobs

File Edit View Insert Format Tools Data Window Help Adobe PDF

text orientation

P33

Worksheet: Indicators of Quality Cross-Referenced to Job Descriptions

|    | A                                                                            | B                  | C          | D                   | E                 | F                      | G                     | H               | I                  | J                  | K        | L            | M                      | N           | O | P | Q | R | S | T | U |  |  |
|----|------------------------------------------------------------------------------|--------------------|------------|---------------------|-------------------|------------------------|-----------------------|-----------------|--------------------|--------------------|----------|--------------|------------------------|-------------|---|---|---|---|---|---|---|--|--|
| 1  |                                                                              |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 2  |                                                                              |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 3  | <b>Worksheet: Indicators of Quality Cross-Referenced to Job Descriptions</b> |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 4  |                                                                              |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 5  | <b>INDICATOR OF QUALITY</b>                                                  | Executive Director | Accountant | Prog Operations Mgr | Intake Specialist | DME Refurbishing Coord | Computer Refurb Coord | DME Repair Tech | Sanitization Coord | Distribution Coord | Case Mgr | Bio Med Tech | Occupational Therapist | Mailing Mgr |   |   |   |   |   |   |   |  |  |
| 7  | Organizational Structure                                                     |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 8  | Governing Body                                                               |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 9  | Staffing Model                                                               |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 10 | Involvement of People w/ Disabilities                                        |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 11 | <b>SUSTAINABILITY</b>                                                        |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 12 | Sustainability Planning                                                      |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 13 | Program Statistics                                                           |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 14 | Program Outcome Data                                                         |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 15 | Program Evaluation Plan                                                      |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 16 | <b>PROGRAM OPERATIONS</b>                                                    |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 17 | Facilities, Accessibility                                                    |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 18 | Facilities, Safety and Security                                              |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 19 | Facilities, Space and Services                                               |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 20 | Device Tracking (Inventory)                                                  |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 21 | Device Valuation                                                             |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 22 | Device Alerts & Recall Management                                            |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 23 | Donated Equipment: policies for                                              |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 24 | Donated Equipment: confirmation of                                           |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 25 | Evaluation of Devices for Refurbishment                                      |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 26 | Sanitization of Donated Equipment                                            |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 27 | Refurbishing Donated Equipment                                               |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 28 | Data removal from digital devices                                            |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 29 | Software Licensing Compliance                                                |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 30 | Limited warranty for refurbished devices                                     |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 31 | Storage of Donated Equipment                                                 |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 32 | Transportation of Donated Equipment                                          |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |
| 33 | End of Life Disposal                                                         |                    |            |                     |                   |                        |                       |                 |                    |                    |          |              |                        |             |   |   |   |   |   |   |   |  |  |

# Guide Interviewing and Selection

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**Written job descriptions provide a basis for questioning candidates to determine which are best qualified for the job.**

*Reviewing the major duties should prompt questions about experience and aptitude to perform those tasks.*

# Analyze and Improve Program Performance

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**Job descriptions can be used to:**

- **Identify gaps in responsibility for program activities**
- **Identify tasks and activities that need to be performed**
- **Analyze the logic of reporting relationships**

# Job descriptions for everyone?

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- Employees?
- Contractors?
- Volunteers?



# Writing the Job Description

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**The first task in writing a job description is to gather precise information.**

A ***job questionnaire*** is a useful tool for this task.

(See the documents in the download package.)

If the position exists and is filled, the incumbent(s) may be asked to complete the questionnaire. This will highlight differences in perception and reality.

An administrator must complete the questionnaire independently and compare with incumbent responses.

# The Basics

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- **Title**
- **Department**
- **Supervisor's Title  
(reporting relationship)**
- **Location**



**Title: Intake Clerk**  
**Dept.: User Services**  
**Supv.: Client Services Mgr.**  
**Location: Central Office**

# Specify Function

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## Purpose of this job:

**“Essential job functions” are a critical factor in disability discrimination claims. Specify clearly.**



## Example:

### **AT REPAIR TECHNICIAN:**

- Repairs medical equipment
- Disassembles and inspects equipment
- Replace parts as needed
- Replaces defective parts, and solders, tightens and aligns parts
- Installs modified parts
- Cleans, lubricates and polishes equipment components

# Scope of Responsibility

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## Factors to consider:

- **Supervisory (How many people?)**
- **Financial (Size of budget? Assets managed?)**
- **Degree of impact**

## Example:

- **Supervises two technicians**
- **Manages \$150K budget**
- **Oversees all refurbishing operations**

# Identify the Major Responsibilities

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- List the primary activities that will be performed.
- Specify which are a primary responsibility and which are shared.
- Identify the percentage of time devoted to the activity in an average week.
- Identify five major activities and list in order of importance. *Emphasize these in interviews.*
- Describe two of the most complex or difficult problems that may be encountered in a year.

*Ask candidates how they would handle these!*

# Focus on Primary Duties and Responsibilities

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2. Primary responsibilities and activities. List all activities occupying the major part of the person's time. If the person performs the activity it should be so stated. If the person manages or shares the responsibility with another person, use action verbs such as "supervises," "coordinates," and "cooperates with."

| Responsibility/Activity | % of Time |
|-------------------------|-----------|
|                         |           |
|                         |           |
|                         |           |
|                         |           |
|                         |           |

NEXT, please list at least five activities in the order of their importance. Indicate the approximate percentage of time devoted per week to each responsibility.

| No. | Duties and Responsibilities | % of Time |
|-----|-----------------------------|-----------|
| 1   |                             |           |
| 2   |                             |           |
| 3   |                             |           |
| 4   |                             |           |
| 5   |                             |           |

# List Occasional Duties

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- **Identify occasional duties and special assignments**
- **Estimate the time required**
- **Specify frequency of these tasks**

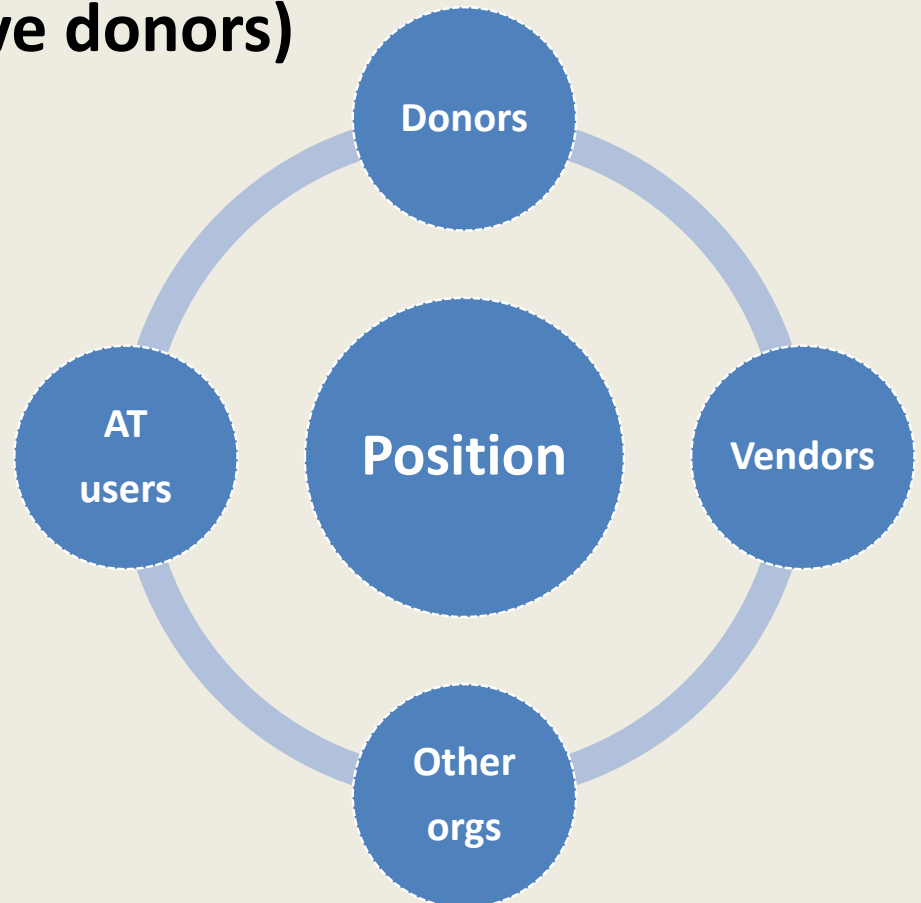
- *Example:*

Employee may be asked to participate in three or four donation drives each year. These events typically take place on Saturday and last approximately 6 hours.

# Analyze Customer Relationships

34

- **Public (donors, prospective donors)**
- **Customers (AT users)**
- **Vendors**
- **Other organizations**



# Define Knowledge and Skills Required

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- **Specify knowledge needed to perform job**

Acceptable form of acquisition: education, formal training, OJT

- **Specify skills needed**

How will skills be verified? Credentials? Test?

- **Why are they needed?**

Not legal to require knowledge and skills not required to do the work



*So, how does a degree in chemistry help me serve donuts?*

# Specify Supervisory Responsibility

36

- **List titles of position(s) supervised**
- **Indicate the number in each role (and whether employees, contractors or volunteers)**
- **Define level of responsibility**

# Describe Operating Responsibility

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- **Describe decision-making and authority in immediate area.**
  - List program functions for which the position is responsible
  - Indicate types of decisions person must make to fulfill job functions
- **Describe decision-making related to other departments or functions.**
  - “Works with \_\_\_\_\_ to”
  - “Participates in selection of \_\_\_\_\_”

# Describe Financial Responsibility

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- **Define sums of money for which this position is directly responsible:**
  - Budgeted amounts for salaries or supplies
  - Payments for services
  - Cash donations
- **Define other responsibilities with financial implications:**
  - Inventory management
  - Negotiation of leases
  - Purchasing approvals



# Explain Personnel/Administrative Responsibility

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## Participates in?



- Recruitment
- Interviewing
- Selection
- Performance evaluation
- Termination decision

# From Questionnaire to Job Description

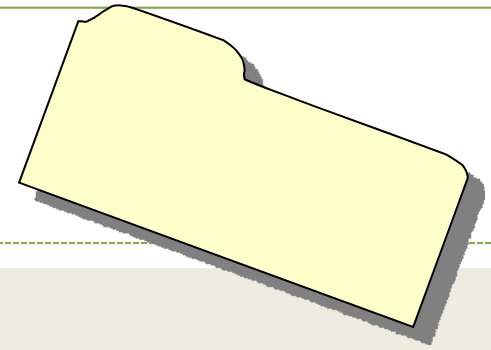
40

- **Review and modify as needed**
- **Transfer information to the formal language of the job description (see examples)**
- **After the job descriptions are complete, have an HR professional or an attorney review them**

**There are many appropriate formats for job descriptions. This is only one. Focus on the usage.**

# Don't just file it!

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- **Use the job description to write the language that will be used to run an ad, list the job opening on a web site or post the position.**
- **Share the job description with all managers.**
- **Give a copy to the incumbent (if one or more exists) and discuss changes, if any, in duties and expectations.**
- **Create interview questions based on the document.**
- **Use it to create a customized performance evaluation tool.**
- **Review policies and procedures.**

# Performance Evaluation: Why?

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- **To develop employees**
- **To contribute to mission achievement through performance enhancement**
- **To document performance management steps**

## Developing a Basic Form for the Program

- **Identify elements for cover sheet.**
- **Determine a scale for evaluation.**
- **Define what each point on the scale means (how it is met)**
- **Identify the skills and behaviors that will be universally evaluated for all workers.**

## Use the Job Description to Create a Customized Evaluation Form

- Use the major responsibilities to define the position duties.
- Identify the five (or more) major responsibilities as “core”.
- Define what must be done to meet expectations.

# What might change a job description?

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- Changes in program activities
  - New activities
  - New methods of performing existing activities
- Changes in market being served
  - Change in geographic territory served
  - Change in customer groups served
- Expansion of staff
  - Growth in volume drives structural change
  - Additional resources permits expansion

# What happens if a job changes?

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- Review the job description:
  - Look for changes in job duties, responsibilities or reporting relationships
  - If the position is filled, the revised job description should be discussed with the incumbent. If the person doesn't meet the new requirements, explain what assistance will be given to facilitate the necessary steps.
- Update the organization chart if necessary.
- Review the compensation plan.

# Summary: Applying the Process

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- Develop job descriptions that accurately reflect what the worker is expected to do and the requirements for the position.
- Compare the duties in the job descriptions to factors for consideration in the Indicators of Quality and ensure that key responsibilities appear on the job descriptions.
- Use job descriptions to build a reasonable compensation plan, to recruit workers who meet the needs, and to drive performance management in the organization.
- Use job descriptions to facilitate compliance with employment laws.

# Time to Evaluate *Our* Performance, Please

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**Please complete a brief evaluation of today's Pass It On Center Webinar at:**

**<http://www.surveymonkey.com/s/R325KJX>**

# Thank You

<http://www.passitoncenter.org>

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