

INTRODUCTION

Purpose of Position Information Questionnaire (PIQ)

The attached PIQ is intended to gather current information on Institution jobs in a consistent, systematic way, while still providing you with the opportunity to describe the particulars of your job.

PIQs and resulting job descriptions are important for a number of reasons, including:

- to describe and clarify a job's expectations, requirements and essential functions
- to provide the information necessary to determine a position's appropriate grade and pay level
- to provide information necessary for recruitment.

To accomplish these objectives, it is important that the PIQ convey the job requirements as well as the nature and scope of responsibilities. It is not necessary to know every task or specific duty.

Completing the PIQ

In general, we suggest that you complete the PIQ in draft form and review and discuss it with your supervisor, reaching consensus on a final version. In some cases, someone other than your supervisor may have a better understanding of the details of your job responsibilities, and should be included in developing a final PIQ. If you have difficulty completing this, or need assistance, please contact Human Resources.

While the intent is to get complete, accurate information, we recognize that it is impossible to describe all of the responsibilities that a job entails, particularly for jobs that are project-based and the nature of the work changes from project to project. However, you should be able to broadly describe the responsibilities that you typically handle.

The document may seem large at first, but it should be relatively easy for you to complete, since much of it is "multiple choice." The most time-consuming part will likely be the first couple of pages, where you are being asked to describe the major responsibilities of your job. If you find it difficult to identify the major responsibilities, try listing all the duties you currently perform on a regular basis. Then take these duties and cluster them into categories. At this point, it may be easier to define broad responsibilities. If you are still having difficulty, you may want to consult someone who is familiar with your job to get another perspective.

Note: Throughout this document, you will see reference to the word "customer." This refers to anyone who is dependent upon your work or to whom you provide services, either internally or externally, such as peers, supervisors, colleagues in other departments, external agencies or institutions, etc.

INSTRUCTIONS

Please remember to answer questions with the characteristics and requirements of your job.

- Enter all job-specific data, using the correct WHOI position title (if you know it).
- **Position Summary:** This is a one or two sentence statement that captures the reason your job exists.

For Example:

“This position is responsible for providing administrative support to the Development department.”

-or-

“This position is responsible for managing oceanographic research projects.”

- **Primary Responsibilities:** List up to six primary duties and responsibilities and the approximate percentage of time spent on each over the course of a year.

The purpose of the questionnaire is to gather specific information on the essential functions of a position; do not include tasks and responsibilities that are not essential to your job's purpose. Include physical requirements only if essential to performing your job duties.

The statements should clearly convey the nature and scope of responsibilities and how they get accomplished. It is helpful to think of the statement in three (3) parts:

ACTION WORD + END RESULT + ACTIVITY

To Illustrate:

Primary Responsibility for Human Resource Representative:

“Provide qualified candidates for job openings by screening applicants.”
action word end result activity

NOT an appropriate statement:

“Place ads for job candidates in newspaper.”

- **Organization Chart:** Show your job's relationship to others by indicating the title of your supervisor and his/her supervisor, as well as titles of others reporting to your supervisor and titles of positions reporting to you.
- **Job Dimensions:** Please read the definition carefully and indicate the one level of each dimension that best applies to your job.
- **Other Information:** Add any additional information you feel is important to more fully describe your job.
- **Finalization:** You and your supervisor should review, discuss, and reach consensus on this PIQ. If you work closely with someone (other than your supervisor) who knows your job responsibilities well, you may want to review your PIQ with that person as well. You and your supervisor should both sign off and send it to your Department Administrator/Manager.

Your Position Title:

Your Department:

Your Supervisor's Position Title:

Is there someone, besides yourself and your supervisor, who has in-depth knowledge of your job responsibilities? _____ If so, indicate name and position.

Position Summary: *In one or two sentences, briefly but specifically, summarize the primary purpose of your job.*

Primary Responsibilities: *List up to six **primary** responsibilities of your job in the space provided below, indicating the most important first, and the approximate percentage of time spent on each over the course of a year. DO NOT list any responsibilities that require 5% or less of the position's time.*

1.

% Time

2.

% Time

3.		% Time
4.		% Time
5.		% Time
6.		% Time

Organizational Chart: Show your position's relationship to others by indicating your supervisor's title, his/her supervisor's title, the titles of others in positions equivalent to your position (peers) that report to your supervisor, and the titles of people reporting to you. Add more boxes as necessary.

The diagram is an organizational chart template. At the top center is a box labeled "Next level of management:". A vertical line connects it to a box below labeled "Supervisor or manager:". To the left of the "Supervisor or manager:" box is a vertical line that branches into three horizontal lines, each leading to a box labeled "Title of peer reporting to same supervisor:". Below the "Supervisor or manager:" box is a box with a double border, representing the respondent's position. An oval with an arrow points to this box, containing the text "Enter your position's title.". To the right of the double-bordered box is a vertical line that branches into three horizontal lines, each leading to a box labeled "Title of direct report:". The boxes for direct reports are stacked vertically.

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graph TD; NLM[Next level of management:] --- SM[Supervisor or manager:]; SM --- P1[Title of peer reporting to same supervisor:]; SM --- P2[Title of peer reporting to same supervisor:]; SM --- P3[Title of peer reporting to same supervisor:]; SM --- Y[Enter your position's title.]; Y --- Y2[ ]; Y2 --- DR1[Title of direct report:]; Y2 --- DR2[Title of direct report:]; Y2 --- DR3[Title of direct report:];
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Education and Experience: *The minimum relevant education and/or equivalent relevant experience as indicators of the knowledge, judgment and seasoning required to effectively perform your job's responsibilities.*

- ☐ Requires high school diploma, GED or relevant educational preparation.
- ☐ Requires proficiency achieved through specialized, vocational or technical training or education beyond high school (or equivalent education), which can be obtained within 12 months and/or equivalent relevant experience.
- ☐ Requires proficiency achieved through an associate, vocational or technical school degree, completion of an apprenticeship program and/or equivalent relevant experience.
- ☐ Requires proficiency achieved through a bachelor's degree and/or equivalent relevant experience.
- ☐ Requires proficiency achieved through a master's degree and/or equivalent relevant experience.
- ☐ Requires proficiency achieved through a doctorate degree and/or equivalent relevant experience.

Technical Expertise: *The depth and breadth of knowledge required to effectively perform your job responsibilities.*

Pages 7 and 8 describe different but equivalent types of technical expertise.

Non-research employees should complete page 7.

Research staff should complete page 8.

- ☐ Requires working knowledge of basic vocational skills and the ability to understand and follow written or oral instructions. Requires no more than three months to learn job.
- ☐ Requires knowledge of learned procedures, practices and more complex vocational skills. Vocational training in certain procedures or equipment may be required.
- ☐ Requires full working knowledge of procedures, policies and practices, advanced vocational training, or basic knowledge of a professional or technical field.
- ☐ Requires a thorough understanding of theoretical and/or practical aspects of own professional or technical discipline.
- ☐ Requires in-depth knowledge of principles, practices and theories in own professional discipline. Meets needs of internal/external customers. Makes self available as a resource for others. May have knowledge of more than one professional discipline.
- ☐ Requires in-depth knowledge of advanced principles, techniques and theory in a professional discipline. May have considerable knowledge of other professional or technical disciplines and general management principles. Addresses complex internal/external situations. Makes self available to Institution as an expert resource in own professional discipline.
- ☐ Requires extensive knowledge of a specialized professional or technical discipline and highest level of general management knowledge. Has knowledge of other professional disciplines. Identifies trends, new theories in area of expertise and educates subordinate staff.

Technical Expertise: *The depth and breadth of knowledge required to effectively perform your job responsibilities.*

Research staff should complete the following:

- ☐ Requires directed application of standard techniques, procedures and criteria in carrying out a sequence of related tasks with limited exercise of judgment.
- ☐ Requires independent evaluation, selection and application of standard techniques, procedures and criteria, using own judgment to make minor adaptations or modifications.
- ☐ Requires planning and conducting research involving independent judgment and evaluation, selection and substantial adaptation and modification of standard techniques, procedures and criteria.
- ☐ Requires application of intensive and diversified knowledge of principles and practices. Uses advanced techniques and serves as leader in researching significant issues and planning and coordinating work.
- ☐ Requires research management involving exploration of subject area, definition of project scope and selection of issues for investigation, as well as development of novel concepts and approaches.
- ☐ Requires high degree of creativity, foresight and mature technical judgment in making decisions and recommendations that are recognized as authoritative. Plans, organizes and guides research programs with high degree of complexity, novelty or significance.

Professional Responsibility: Two different but equivalent tracks: supervisory/managerial, and individual contributor. Individual contributors do not have direct responsibility for the work of others, but may work regularly as part of a team or work unit. **Choose the track that applies to your job and select the level that most appropriately describes your responsibilities.**

Supervisory/Managerial

- ☐ Supervises clerical/administrative positions or other positions with relatively straightforward responsibilities. May perform work of a similar nature to those supervised. Generally supervises small work unit.
- ☐ Supervises small- to medium-sized work unit/project team of positions of moderate complexity. Supervises directly or through team/work unit leaders.
- ☐ Supervises functional activity, generally through subordinate supervisors. Contributes to establishment of budget, staffing and performance decisions.
- ☐ Manages through subordinate supervisors and managers. May manage minor segment of institution; organizational and staffing decisions subject to approval by top management.
- ☐ Manages and directs a large, critical institution-wide function or major organizational unit through subordinate managers.
- ☐ Manages and directs the overall operations of one or more divisions or major operations through top managers. Sets strategy and performance goals for area of responsibility.

Independent Contributor

- ☐ Provides routine services (e.g., clerical) or factual input on routine matters.
- ☐ Provides services, information and/or analysis of a somewhat varied nature.
- ☐ Provides technical and analytical services of a moderately complex nature. Identifies, collects and manipulates appropriate data and information.
- ☐ Selects, applies or modifies existing diagnostic tools and solutions based on internal/external customer or research project needs. Partners with appropriate parties to develop appropriate solutions.
- ☐ Provides high-level consultation and analysis in area(s) of expertise. Designs appropriate diagnostic tools and solutions based on unique internal/external customer or research project needs.
- ☐ Plans and conducts large, important projects, reviews progress and evaluates results. Provides advanced technical and/or professional guidance/expertise. Creates customized diagnostic tools and solutions.
- ☐ Provides consultation/analysis as recognized master and expert in one or more complex professional/technical specialties. Develops solutions to most complex, intractable problems. Conceptualizes at the highest level to

Job Dimension

develop unique innovations, approaches and interventions.

External Contacts/ "Customer" Service: *The nature of regular contact with individuals outside of WHOI. Report the typical level of contact required on a regular basis. Assume that the selected level includes some elements of contact in the lower levels.*

- ☐ Position does not require direct contact with external "customers"/contacts.
- ☐ Requires contact with external "customers"/contacts to furnish or obtain factual information.
- ☐ Within own area of expertise, serves as a "customer" resource/point of contact for external parties.
- ☐ Within own area of expertise, articulates or identifies "customer"/contact needs in more complex situations. Identifies issues and determines potential solutions.
- ☐ Within own area of expertise, works with "customers"/contacts to resolve serious issues, maintain key relationships or deal with sensitive issues.
- ☐ Serves as a principal representative of WHOI, maintaining and developing relationships with key external contacts and the research and/or business community at large.

Internal Contacts: *The nature of contact between you and other WHOI employees regularly required to perform the functions of your job effectively. This includes contact with other departments to provide information and/or services. Report the typical level of contact required on a regular basis. Assume that the selected level includes some elements of contact described in lower levels.*

- ☐ Position requires contact only within own department/group.
- ☐ Position requires internal contact outside own department/group to exchange routine, work-related information.
- ☐ Position requires internal contact outside own department/group to exchange complex information or resolve problems.
- ☐ Position requires internal contact outside own department/group to persuade, gain cooperation and acceptance of ideas or collaborate on significant projects.
- ☐ Position requires internal contact outside own department/group in situations requiring resolution of conflict, negotiation or collaboration on major projects.
- ☐ Position requires internal contact outside own department/group to negotiate sensitive issues and facilitate collaboration at the highest level. Position is

responsible for establishing procedures to ensure consistent, high quality internal “customer” service and collaboration.

Scope of Impact: *The magnitude, importance and extent of impact your job has within WHOI.*

- ☐ Impact of actions and decisions generally limited to own job.
- ☐ Impact of actions and decisions generally limited to own work unit.
- ☐ Impact of actions and decisions generally limited to own department/group.
- ☐ Actions and decisions have sizable impact on WHOI's short-term performance and noticeable impact on its long-term success.
- ☐ Broad impact on both the short- and long-term success of WHOI.
- ☐ Very broad and lasting impact on WHOI's future and/or reputation.

Funding: *The nature and extent of the position's involvement in funding activities.*

- ☐ Position has no involvement in funding efforts.
- ☐ Position provides administrative support for the funding activities of others.
- ☐ Position provides technical support for the funding activities of others by conducting research or assisting with proposal writing.
- ☐ Position identifies sources of funding for own area of expertise and writes proposals. Regularly participates in funding efforts.
- ☐ Position has primary responsibility for securing funding for own area. Works both independently and in concert with other WHOI groups in funding efforts.
- ☐ Position leads funding initiatives for large groups or the Institution as a whole. Responsible for achieving group and organizational funding goals.

Physical/Environmental Demands: *The typical work environment and physical effort required to perform the duties of your job.*

Please indicate the nature of physical and/or environmental demands **required** by your job. This information is important in documenting the essential functions of your job, as required by the Americans with Disabilities Act.

***complete attached Addendum where appropriate**

Physical Effort

- | | |
|--|--------------------------|
| No specific or unusual physical requirements | ☐ |
| Vision and hearing requirements* | ☐ |
| Specific physical requirements, such as lifting, carrying, etc.* | ☐ |

Environmental Demands

- | | |
|--|--------------------------|
| Normal office environment | ☐ |
| Exposure to extreme environmental conditions (excessive/prolonged heat, cold or humidity)* | ☐ |
| Exposure to chemicals and/or other potential hazards* | ☐ |
| Periods at sea* | ☐ |
| Exposure to extreme/prolonged weather conditions* | ☐ |

Other*: (Describe)

Additional Information: Please describe as clearly and concisely as possible any additional information that would be important to fully understand the role, responsibilities, nature and scope of your job.

[illegible]

After you and your supervisor have had a chance to review, discuss and reach consensus on this questionnaire please print and sign your name below.

Forward the PIQ to your Department Administrator/Manager for departmental review. They will send it to Human Resources.

<i>(Employee)</i>	Date:
<i>(Supervisor)</i>	Date:
<i>(Department)</i>	Date:
<i>(Human Resources)</i>	Date:

Complete this addendum, where applicable, only if your job at WHOI requires specific physical and/or environmental demands.

PHYSICAL EFFORT

Lifting

Is lifting required on the job? ☐ Yes ☐ No

If yes, please complete:

- ☐ Above the shoulder
- ☐ Shoulder to knee
- ☐ Knee to floor
- ☐ Distance of object from body: _____ inches
- ☐ Maximum weight to be lifted independently: _____ pounds
- ☐ Maximum weight to be lifted with assistance: _____ pounds
- ☐ Assistant device used: _____ pounds
- ☐ Lifting over 50 pounds, no assistance: _____ times per hour, _____ per day
- ☐ Lifting under 50 pounds, no assistance: _____ times per hour, _____ per day
- ☐ Lifting 25 to 50 pounds: _____ times per hour, _____ per day
- ☐ Lifting 10 to 25 pounds: _____ times per hour, _____ per day
- ☐ Lifting 0 to 10 pounds: _____ times per hour, _____ per day

Carrying

Is carrying required on the job? ☐ Yes ☐ No

If yes, please complete:

- ☐ Maximum weight to be carried: _____ pounds
- ☐ Distance to be carried: _____ feet
- ☐ Carrying over 50 pounds: _____ times per hour, _____ per day
- ☐ Carrying under 50 pounds: _____ times per hour, _____ per day
- ☐ Carrying 25 to 50 pounds: _____ times per hour, _____ per day
- ☐ Carrying 10 to 25 pounds: _____ times per hour, _____ per day
- ☐ Carrying 0 to 10 pounds: _____ times per hour, _____ per day

Vision

Are there any vision requirements associated with the job? ☐ Yes ☐ No

If yes, please complete:

- ☐ Depth perception
- ☐ Ability to see peripherally
- ☐ Ability to adjust vision to bring objects into focus
- ☐ Ability to distinguish basic colors
- ☐ Specific visual requirement(s) (specify):

Hearing

Are there any hearing requirements associated with the job? ☐ Yes ☐ No

If yes, please describe:

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Miscellaneous Physical Tasks

Please indicate other physical tasks required in the job.

- ☐ Continuously sedentary positions
- ☐ Mostly sedentary work
- ☐ Occasional standing/walking
- ☐ Occasional prolonged standing/walking
- ☐ Frequent prolonged standing/walking
- ☐ Prolonged, extensive or considerable standing/walking
- ☐ Manual dexterity and mobility
- ☐ Use of hands for basic grasping/manipulation
- ☐ Use of hands for fine manipulation
- ☐ Occasional reaching, stooping, bending, kneeling, crouching

☐

Considerable reaching, stooping, bending, kneeling, crouching

☐

Other (specify):

WORKING CONDITIONS

Please indicate the working conditions that apply to the job.

		% of Time *
☐	Excessive cold	_____
☐	Excessive heat or humidity	_____
☐	Dust or other irritants	_____
☐	Grease and oils	_____
☐	Infectious and contagious diseases	_____
☐	Hazardous substances or specimens	_____
☐	Electrical/mechanical/power equipment hazards	_____
☐	Odorous chemicals or specimens	_____
☐	High locations	_____
☐	Extended periods at sea	_____
☐	Severe weather conditions	_____
☐	Prolonged work hours	_____
☐	Other (specify):	_____

* Approximate percent of time over the course of a year.