

Instructions for Using the Essential Functions Worksheet

The worksheet will help you develop your Essential Functions statements to be used by your Supervisor in creating your job description. An Essential Function statement is a description of a major end-result for which you will be held accountable for achieving in this position. Most positions will typically have no more than six (6) essential function statements. Developing these statements can be a challenge because the tendency is to think about the tasks and activities, rather than broader responsibilities. This distinction will become clearer as you work through the worksheet.

The instructions for completing the worksheet are below, followed by an example.

1. Think about the tasks and activities for the position and list these in the *Tasks and Activities* column of the worksheet.
2. Review the *Tasks and Activities* and cluster them into *Related Groupings*. In this example, all the tasks and activities related to meeting planning would go into one *Related Grouping* box.
3. Next, review each *Related Grouping*. Eliminate duplicates, consolidate closely related duties and activities, and reword anything that isn't clear or concise.
4. Look at the statements in each grouping. What is the position's role relative to these statements, what will the position holder be held accountable for achieving? Write a clear, concise statement that describes the Essential Function in the *Essential Function* box.
5. Once you have drafted all the Essential Function Statements, review them with your Supervisor. Do they accurately and thoroughly describe your position? If not, modify as necessary.

The following page shows an example of how the worksheet can be used for a job title "Budget Manager" (page2) or "Events Assistant" (page 3).

REPRESENTATIVE DUTY STATEMENT WORKSHEET—EXAMPLE

Position Title: <u>Budget Manager</u>		
Tasks & Activities	Related Groupings	Essential Function Statement
<ul style="list-style-type: none"> • Maintain spreadsheet of budgeted vacancies and lapsed salaries • Maintain list of budgeted salaries • Process personnel forms • Support hiring process via HR ATS • Maintain employee performance records • Oversee personnel and operations budget for department • Track expenses, balance accounts and transfer funds • Allocate funds to other departments • Write budget reports • Develop annual budget • Audit purchasing card transactions 	<ul style="list-style-type: none"> • Maintain spreadsheet of budgeted vacancies and lapsed salaries • Maintain list of budgeted salaries • Allocate funds to other departments • Balance accounts and transfer funds • Oversee personnel and operations budget for department • Develop annual budget 	<ul style="list-style-type: none"> • Manage Department budget <ul style="list-style-type: none"> – Ensuring accurate reporting of budgeted vacancies and lapsed salaries – Allocating funds, balancing accounts, and transferring funds – Overseeing personnel and operations budget – Developing annual budget
	<ul style="list-style-type: none"> • Process personnel forms • Support hiring process via HR Applicant Tracking System • Maintain employee performance records 	<ul style="list-style-type: none"> • Oversee personnel processes <ul style="list-style-type: none"> – Processing personnel forms – Supporting hiring process via HR Applicant Tracking System – Maintaining employee performance records
	<ul style="list-style-type: none"> • Track expenses • Write budget reports • Audit purchasing card transactions 	<ul style="list-style-type: none"> • Advise Director on budget matters <ul style="list-style-type: none"> – Tracking expenses – Ensuring accurate budget reporting – Auditing purchasing card transactions

REPRESENTATIVE DUTY STATEMENT WORKSHEET—EXAMPLE

Position Title: <u>Events Assistant</u>		
Tasks & Activities	Related Groupings	Essential Function Statement
<ul style="list-style-type: none"> • Transport and deliver furniture and equipment to appropriate location • Prepare and serve breakfast and lunches for meetings • Verify furniture and equipment deliveries • Assemble furniture • Wash dishes/utensils and put in storage • Take order for meals for meetings and events • Inspect furniture and equipment for damage • Order office supplies • Charge cost of meals to departments • Maintain inventory of office supplies • Prepare requisitions for special orders for supplies • Order food and supplies 	<ul style="list-style-type: none"> • Transport and deliver furniture and equipment to appropriate location • Verify furniture and equipment deliveries • Assemble furniture • Inspect furniture and equipment for damage 	<ul style="list-style-type: none"> • Coordinate the receipt and set-up of furniture and equipment <ul style="list-style-type: none"> – Ensuring accuracy of furniture and equipment deliveries – Transporting, delivering and installing furniture and equipment to appropriate location – Inspecting furniture and equipment for damage and making appropriate repairs
	<ul style="list-style-type: none"> • Prepare and serve breakfast and lunches for meetings • Wash dishes/utensils and put in storage • Take meal orders for meetings and events • Charge cost of meals to departments • Order food and supplies 	<ul style="list-style-type: none"> • Coordinate all aspects of meal service for internal meetings and events by <ul style="list-style-type: none"> – Planning meals and ordering appropriate food and supplies – Preparing and serving meals, including clean-up – Establishing and tracking budgets; charging cost of meals/event to departments
	<ul style="list-style-type: none"> • Order office supplies • Monitor inventory of office supplies • Prepare requisitions for special orders for supplies 	<ul style="list-style-type: none"> • Maintain office supplies inventory by <ul style="list-style-type: none"> – Monitor supply inventory, replenishing as necessary – Preparing and processing requisitions for special orders

