



## ***PROCEDURES FOR COMPLETING THE POSITION DESCRIPTION QUESTIONNAIRE (PDQ)***

### **Overview:**

The Position Description Questionnaire (PDQ) provides information and gives a factual, precise, and clear delineation of information about the position. The PDQ is used to update job changes to a position or for providing job description information for the hiring process.

Although the completion of the PDQ should be a cooperative effort between the incumbent and supervisor, the incumbent is in a position to develop the most accurate and complete description. Therefore, the incumbent should complete the PDQ and provide it to the supervisor to review for uniformity of format, completeness, and simply stated duties and responsibilities. When completing each section of the PDQ, it is helpful if you can imagine that the position is vacant and you have been asked to identify the position's basic requirements. The purpose of the PDQ is to collect objective information on position requirements, which may be different from your personal skills and qualifications. Do not describe the position based on what you think the position "should be". Try not to overstate or understate your responses.

When listing the primary responsibilities and duties of the position, think of these in terms of the end results for which the job is responsible. Avoid listing the detailed tasks or activities performed to accomplish the end result. For example, "word processes documents from drafts" is a statement of **what** is done. "Organizes documents, brings up software, enters document, prints and proofs document" are all statements of **how** it is done.

Each responsibility statement should begin with an action verb. Most jobs will have four to six primary job responsibilities. If there are more than six, check to be sure you are listing primary responsibilities and not individual tasks. You may find it easier to first list the detailed tasks or activities performed and then group similar or related tasks together into overall responsibilities.

### **Procedures:**

1. Refer to the [Administrative/Professional Exempt Search Procedure](#) for any questions on the hiring process.
2. Review the entire PDQ prior to completing to allow you the opportunity to determine tasks vs. responsibilities. Also review University and department mission statements and previous PDQ.
3. Compile tasks or activities and responsibilities that are performed. Determine whether you can group several tasks or activities into a specific responsibility or function. Determine where the responsibility fits best, i.e. which factor in the questionnaire is most appropriate.
4. Begin completing the necessary information. Make sure to address the clarifying questions associated with each factor to the best of your ability.
5. Once completed, sign and date under "Prepared By." If the incumbent is completing the PDQ, s/he will submit the PDQ to the supervisor for review and signature. The supervisor reviews the PDQ to determine completeness and accuracy. If there are questions, the supervisor reviews the PDQ with the administrator. The supervisor may make revisions to the PDQ as required.
6. Once the supervisor signs the PDQ, it is forwarded to the vice president for approval, and signature.
7. If the position is new, the President must review and approve the PDQ prior to beginning the recruitment process. **Please Note:** Any position whose salary is \$75,000 or more will need to include a cover memo to the President indicating the reasons for the salary requested.
8. Once all signatures have been obtained, the PDQ is forwarded to Human Resource Services for review and band placement.

Attachment A



***POSITION DESCRIPTION QUESTIONNAIRE  
ADMINISTRATIVE EXEMPT***

**1. POSITION IDENTIFICATION**

**POSITION #:** \_\_\_\_\_ new \_\_\_\_\_

**University Title:** \_\_\_\_\_ Business Operations Manager \_\_\_\_\_

**Department:** \_\_\_\_\_ **Account #:** \_\_\_\_\_

**Division:** \_\_\_\_\_

**Location:** \_\_\_\_\_

**Position Is:**    ☒ Regular    \_\_\_\_\_ Temporary    ☒ Full-Time    \_\_\_\_\_ Part-Time    1.0 FTE

**Position Description Questionnaire is:**    ☒ New    \_\_\_\_\_ Revised

**Incumbent:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**Position Reports To:** \_\_\_\_\_

**Title:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**Prepared By:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Supervisor Approval:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Dean/Director Approval:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Vice President Approval:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**President Approval:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**(Required on new position)**

**FOR HUMAN RESOURCES USE ONLY**

**Reviewed By:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**BAND:**    \_\_\_\_\_ Executive    \_\_\_\_\_ Senior Management    \_\_\_\_\_ Department Director

\_\_\_\_\_ Professional/Technical    \_\_\_\_\_ Academic/Administrative Specialist



## II. POSITION SUMMARY

*(State the significance/general purpose of this position. Explain why this position exists.)*

The Business Operations Manager is a key position in UNC's new Administrative Service Center (ASC) model. The mission of the ASCs is to provide stakeholders with quality, timely and efficient services. ASCs will achieve this mission by utilizing technology, cultivating the skills of our staff and building strong relationships with campus stakeholders. ASCs will operate with the understanding that we live in a competitive environment and our goal is to ensure efficient and effective service.

ASCs will provide support to UNC's administrative divisions and academic colleges. ASCs will reduce fragmentation in roles and emphasize specializations. In its basic form, the ASC team will consist of (1) a business operations manager, (2) a human resources specialist, (3) an accounting specialist, and (4) a communications specialist.

The Business Operations Manager will have primary responsibility for key business functions, including strategic budget management. Business Operations Managers within the academic colleges will also coordinate various types of academic support, including enrollment analyses, course scheduling, coordination of faculty and course evaluations, faculty workload and overloads, and curriculum support.

## III. DUTIES AND RESPONSIBILITIES

*(List in order of importance and explain the major duties and responsibilities of the position. Indicate the average percentage of time spent performing each separate job duty. The percentages should total 100%. Indicate if the duty is an essential function of the job.)*

### **Budget Manager (40%)**

- Understands the entire division or college budget and provides expertise regarding expenses.
- Creates budget by line item and analyzed in conjunction with the appropriate unit leadership and directors in relationship to expenditures.
- Completes analysis of future year's commitments from a budgetary perspective.
- Provide monthly reports to division/college leadership regarding budget status and balances.
- Prepares and submits budget revisions and corrections.
- Coordinate the preparation and administration of annual operating budgets, forecasts and multi-year projections for use within the division and as a component of university-wide financial reporting and modeling.
- Reviews availability of funding and approves budget revision requests, requisitions for faculty recruitment, faculty contracts, and new staff positions.
- Prepare and submit budget revisions and corrections.
- Fiscal year budget reconciliation with University accounting records.
- Track and monitor internal and external funding sources/budgets.
- Follow University policies and procedures with respect to all financial transactions.
- Conducts budget analysis and anticipates problems to develop processes for resolution.
- Investigate, monitor, advise and recommend solutions for budgetary problems and procedures; compile and present financial data to reporting units (as needed).
- Project expenses and financial feasibility for hiring plans and monitor accounts on a monthly basis. Assist with fiscal policy development within the division.

### **Evaluation Coordination (10%)**

- Monitor all Performance Planning and Evaluation forms for staff in the division/college.
- Provide support for program evaluation, including formative and summative to meet accreditation standards and requirements. (EvalKit).



**Coordinate Academic Support \*for College ASCs (20%)**

- Serve as college's Digital Measures administrator, utilizing DM to track and complete annual reviews, promotion and tenure, post-tenure review, sabbatical applications, teaching, research, and service activity.
- Assist with program review scheduling, verification, and documentation.
- Coordinate and track sabbatical process, including eligibility, accepting applications for sabbatical leave and submitting them to the Provost for approval. Track approvals and denials and enter sabbatical information into Banner.
- Track promotion and tenure status and changes in Banner and submit documentation to HR for filing.
- Verify faculty workload and overloads using historical enrollment data and make recommendations to college leadership regarding faculty workloads.

**Enrollment Analysis/Course Scheduling/ Curriculum Support \*for College ASCs (25%)**

- Manage class schedules, develop and implement timetables and procedures for class scheduling.
- Create, maintain and modify the master class schedule.
- Analyze department schedules to ensure compliance with state and university scheduling policies.
- Analyze historical data and make recommendations to College leadership on enrollment management decisions.
- Track and implement enrollment management recommendations and decisions.
- Compile scheduled and special reports, analyses, and feasibility studies such as annual data summaries and program status reports.
- Provide curriculum development support to faculty, including participation in the College Curriculum Committee.

**Verify Faculty Workload and Overloads \*for College ASCs (5%)**

- Analyze historical data and make recommendations to college leadership on faculty workloads.
- Review enrollments and obtain dean/provost approval for overload EPAF

**IV. COMPLEXITY AND CREATIVITY**

*(In this section describe the degree of problem solving required, the types of problems encountered, and how these problems are solved. Also address the degree of original thinking required to perform a job that is creative or artistic in nature. Please give one or two examples of the more difficult and complex task/projects/problems that are required to be handled. Consider the amount of independent judgment and thought required and the availability of policies, procedures, and standards that give guidance in solving problems. Also indicate whether internal or external directives influence the situation and identify the source(s).):*

This position coordinates administrative tasks of a highly complex nature and is assigned to support multiple directors and unit supervisors. This position requires only general supervision and is often times asked to make independent decisions related to general office management, fiscal management and customer relations:

1. Create spreadsheets to track and document departmental budget and expenses.
2. Formulate documentation pertaining to general office duties.
3. Locate resources required by directors and unit supervisors.

**V. IMPACT ON INSTITUTIONAL MISSION**

1. *Positive Impact: (Describe the positive impact this position has on operations in the area of involvement and/or the University when it is being performed well.)*



The positive impact that this position has is:

- Accountability to the University regarding prudent use of institutional funds.
- Improves division operations, decreases turnaround times, streamlines work processes and works cooperative and jointly to provide quality seamless service to faculty, staff and students.

2. *Negative Consequences:* (Describe the types of negative consequences for work in the area or for the University that might result from an error made by someone in this position who does not possess good job knowledge or use sound judgment.)

Poor decisions by the individual in this position could create an environment where faculty, staff and student needs are not being met in a timely manner, budgets could be overspent, inability to determine the costs associated with various services, etc. Higher paid staff would have to step in to remediate the situation.

3. *Guidance and Review:* (Describe the type of guidance and review given to this position by the supervisor and how often (e.g., daily, weekly, monthly) that guidance and review occurs – for example, supervisor checks work daily, supervisor spot-checks work only occasionally (monthly), supervisor set goals for the employee and reviews progress quarterly, etc.)

Supervisor sets major goals for this position and reviews the progress semi-annually. This position meets regularly with the division/college leader to provide updates regarding ongoing projects.

4. *Department Policies and Procedures:* (Describe the departmental policies and procedures or procedures or formalized regulations which guide the actions in this position, e.g., policies for handling an overdue account or dealing with a student's complaint.)

All applicable division and/or college handbooks and policies.  
University fiscal and budgetary policies.

## **VI. INTERNAL AND EXTERNAL CONTACT**

(Address the responsibility for working with or through other people inside and outside the University to get results. Consideration should be given to the nature of contact and level of interaction encountered on a regular, recurring, and essential basis during operations):

1. *Inside the University:* (Identify with whom you regularly communicate inside the University in order to perform duties, e.g., clerical workers, department heads, etc. Describe what you normally communicate about with these individuals and how often.)

Regularly communicates with students, faculty and staff to determine how to best route their requests.

Regularly communicates with departmental directors and unit supervisors to accommodate their administrative and budgetary needs.

Regularly communicate with other ASC staff and other ASC Business Operations Managers about how to best accomplish complete ASC duties and coordinate special projects and unique needs.

2. *Outside the University:* (Identify with whom you typically communicate outside the University. If anyone, e.g., the public, vendors or suppliers, government officials, etc. Describe what you normally communicate about and how often, e.g., daily, weekly, monthly, quarterly, etc.)

## **VII. FISCAL ACCOUNTABILITY**

(Describe responsibility for financial resources, e.g., budget development and oversight, purchasing, contract



*negotiation, etc. Indicate size of budget for operating expenses, salaries (if applicable), and overall budget. Indicate the type and frequency of decisions regarding budget responsibility):*

This position assists with the development of the annual budget in conjunction with division or college leadership, and this individual signature authority for all unit FOAPs.

**VIII. DIRECTION EXERCISED**

*(Describe the formal responsibility for the supervision of other University staff employees, student workers, temporaries, and/or volunteers. If you do not supervise, please state this fact and go to next section):*

1. Other Administrators: *(Identify how many, if any, you supervise directly and indirectly. Indicate titles, headcount, and FTE.)*

No direct reports

2. Classified Staff: *(Identify how many, if any, you supervise directly and indirectly. Indicate classification*



titles, headcount, and FTE.)

No direct reports

3. *Student Workers:* (Identify how many, if any, you supervise directly or indirectly. Indicate total hours per week per student you spend supervising.)

This position does not supervise student staff.

4. *Nature and Extent of Supervisory Responsibility:* (Briefly describe the nature and extent of responsibility for supervising other employees. Indicate the scope of authority for hiring, training, coordinating work activities, conducting performance reviews, handling disciplinary actions, determine salary increases, etc.)

#### **IX. PHYSICAL DEMANDS**

*(Describe the physical demands of the position as measured by the adequacy, temperature extremes and variations, noise pollution, exposure to fumes, chemicals, radiation, contagious diseases, heights and/or related hazardous conditions. Explain the working conditions of the position including any unpleasant features like heat, cold, high levels of noise, prolonged or near –continuous use of a computer display/terminal, exposure to chemical substances, contagious diseases, etc.)*

Frequently required to sit and concentrate for long periods of time. Occasionally lift and/or move up to 25 pounds.

#### **X. WORKING CONDITIONS**

*(Describe the physical demands of the position as measured by the adequacy, temperature extremes and variations, noise pollution, exposure to fumes, chemicals, radiation, contagious diseases, heights and/or related hazardous conditions. Explain the working conditions of the position including any unpleasant features like heat, cold, high levels of noise, prolonged or near-continuous use of a computer display terminal, exposure to chemical substances, contagious diseases, etc.)*

Noise level in the work environment is usually quiet. Must be able to handle constant interruptions.

#### **XI. POSITION SPECIFICATIONS**

*(Requirements listed in this section constitute the basis for recruitment):*

1. *Education:* (List the specific degrees, vocational or technical training, or post-high school coursework and the field of study, if any, required to perform the duties assigned to the position. Also, state if equivalent experience in lieu of the educational requirement is an option. If so, indicate the specific amount of additional years of experience acceptable and the type of applicable experience.)

Bachelor's degree in the field of Business Administration or Accounting.

OR

Five years of office management experience with a significant budgetary component.

2. *Experience:* (Describe the least amount, i.e., years/months, and type of work experience required, if any, for a person entering this position. Please consider only the position's minimum requirements and not necessarily the incumbent's qualifications. Also, describe how much on-the-job training and experience is/would be required for a new employee to learn all major duties and be capable of performing them well.)

Minimum of five years of progressively responsible related experience.



3. Certification/Registration/Licensing: (Identify any special certifications or licensing, if any, required to qualify for this position.)
4. Ability: (Describe other knowledge, skills, or abilities (e.g., computer skills, mechanical aptitude, research, etc.) required in order to perform the duties assigned.)

This position must have the ability to:

- Perform difficult, complex and detailed clerical and administrative work with accuracy and speed
- Analyze situations accurately and take appropriate action
- Identify problems and recommend sound solutions.
- Communicate effectively in English both written and
- Follow and give oral and written directions
- Perform mathematical calculations with accuracy
- Work independently with minimal supervision
- Interpret, apply and initiate University and IM&T policies and procedures
- Maintain a cooperative working relationship with others
- Interact with the public in helpful, courteous and friendly manner
- Demonstrate sensitivity and respect for a diverse population
- Organize information accurately & quickly
- Able to work with multiple interruptions

5. Special Considerations: (Provide other information unique to this position not identified elsewhere.)

This position must have knowledge of:

- Modern office methods and practices including bookkeeping and fiscal management
- Personal computer software programs including word processing, spreadsheet, workflow tools, electronic markup, SharePoint and Microsoft Teams

## **XII. ORGANIZATION CHART**

(Please provide an organization chart for this position including classification title, position number, employee name, and FTE for each position that is supervised by this position. In addition, include an organization chart for the division that includes this position.)