

Cultural Stewardship Succession Planning Initiative

Job Analysis Template

This Template supports Succession Planning by examining key job tasks, functions, connections, and expertise. Each role should be examined in relation to the larger goals of the department and how the department interacts with other parts of the organization (if applicable).

After the employee completes the Job Analysis:

- Results should be compared to the official job description for the position, to see if updates are needed.
- Workload should be evaluated if it is clear that the current division of labor does not permit adequate time for all of the employee's assigned tasks.
- Leadership should pay close attention to gaps in the individual analyses (ie, this task requires XYZ skill, but this is not listed in our job description, or incumbent employee actually lacks adequate training).
- Leadership should also pay attention to critical tasks that are not described – and therefore not covered – by the current workforce.

Conservation Center for Art & Historic Artifacts and Lyrasis

Adapted from a Resource developed by Society of Human Resource Management

This project was made possible in part by the Institute of Museum and Library Services

JOB ANALYSIS

Job Title: Click or tap here to enter text.

Reports to: Click or tap here to enter text.

Supervises: Click or tap here to enter text.

Completed by: Click or tap here to enter text.

Date: Click or tap to enter a date.

Job Summary: Please provide a brief summary of role's purpose and key responsibilities.

Click or tap here to enter text.

Job Activities: Describe the activity in detail, along with its purpose. Provide a rating for importance vis-à-vis achieving the organization's mission, an indication of how much time is dedicated to the activity, and any special skills required

	Work Activity <i>(What, Why, How)</i>	Importance <i>(high/medium/low)</i>	Frequency <i>(daily/weekly/monthly, # hours)</i>	Special Skills/Tools Required	Decision-Making Authority <i>(high/medium/low)</i>
	Collections Related Activities (or Creative Activities)				
1.	Example: Processing Interlibrary Loan Requests Review requests and identify materials in order to help department meet its role as a resource to the scholarly community	medium	Check items daily – between 10 minutes to 1 hour	Use of ILL database	medium
2.	Example: Creating Finding Aids for Special Collections Assess materials, understand connection to the Library's mission, summarize the significance of the collection and describe its key contents. As an actively collecting institution, keeping up with special collections acquisitions processing is a key component of this role.	high	Monthly – as new collections are acquired. 10-40 hours per collection	Archival description, use of collections database	high

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3.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.		
4.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.		
5.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.		
Visitor Services Related Activities					
6.	<p>Example: Staffing Reading Room Hours</p> <p>Checking in researchers and ensuring that procedures are followed, helping to pull materials and ensure they are safely returned.</p> <p>Allowing public access to the collections is a critical component of our mission and drives our rationale for funding.</p>	High	Daily, 1-4 PM	Customer service skills	high
7.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.		
8.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.		
9.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.		
10.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.		
Operational Activities					
11.	<p>Example: Submitting monthly expense reports</p> <p>Submit entries in the software for all expenses by category. The University will withhold</p>	High	Monthly, 1-2 hours	Use of University's financial management software	low

JOB ANALYSIS

	reimbursements if all departmental expenses are not submitted on time.				
12.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.		

Key contacts: An overview of the role’s interaction with others internally and externally.

Contacts	Frequency <i>(daily, weekly, etc)</i>	Purpose of Contact <i>(get information, share information, persuade, etc)</i>	Primary Means of Contact <i>(in-person, email, phone)</i>
Peers in Department	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Direct Manager	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Administration			
Example: Procurement Department	Weekly/as needed	Must complete requisition form in order to purchase new collections items and supplies	Email/procurement database
Department B	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Department C	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Board Members	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Patrons/Visitors	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
External Partner A	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
External Partner B	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
External Partner C	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Vendors	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Other (specify)	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Supervisory Duties: Employee’s role in directing and supervising the work of others; be sure to note all employees for whose work this role is accountable.

Click or tap here to enter text.

Titles of employees supervised:

Click or tap here to enter text.

JOB ANALYSIS

Please select the options that apply to your position:

QUALIFICATIONS

<i>Education</i>			<i>Related Work Experience</i>		
	Required	Preferred	Years	Required	Preferred
High School Graduate/GED	<input type="checkbox"/>	<input type="checkbox"/>	0 - 1	<input type="checkbox"/>	<input type="checkbox"/>
Associate's Degree:	<input type="checkbox"/>	<input type="checkbox"/>	2 - 5	<input type="checkbox"/>	<input type="checkbox"/>
Bachelor's Degree:	<input type="checkbox"/>	<input type="checkbox"/>	6 - 9	<input type="checkbox"/>	<input type="checkbox"/>
Master's Degree:	<input type="checkbox"/>	<input type="checkbox"/>	10+	<input type="checkbox"/>	<input type="checkbox"/>
Doctorate (PhD, EdD, etc):	<input type="checkbox"/>	<input type="checkbox"/>			
Other: Click or tap here to enter text.	<input type="checkbox"/>	<input type="checkbox"/>			

Can additional experience substitute for education? Yes No

If "yes", how many years of additional experience:

Required Knowledge, Skills, and Abilities [List the minimum required skills and knowledge necessary to perform this job (this will include any required licenses or certifications, or related system experience.)]

Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.

WORKPLACE CONDITIONS (Check those conditions that are related to and/or are required by this job)

Physical Demands (Check one)

Sedentary work that primarily involves sitting/standing.	<input type="checkbox"/>
Light work that includes moving objects up to 20 pounds.	<input type="checkbox"/>
Medium work that includes moving objects up to 50 pounds.	<input type="checkbox"/>
Heavy work that includes moving objects up to 100 pounds or more.	<input type="checkbox"/>

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Physical Activities (Choose one per line)				
<u>Activity</u>	<u>Frequency of Occurrence</u>			
	Never	Occasionally	Frequently	Continuously
Ascending or descending ladders, stairs, scaffolding, ramps, poles and the like.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Moving self in different positions to accomplish tasks in various environments including tight and confined spaces.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Remaining in a stationary position, often standing or sitting for prolonged periods.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Moving about to accomplish tasks or moving from one worksite to another.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adjusting or moving objects up to __ pounds in all directions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communicating with others to exchange information.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Repeating motions that may include the wrists, hands and/or fingers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Operating machinery and/or power tools.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Operating motor vehicles or heavy equipment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessing the accuracy, neatness and thoroughness of the work assigned.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Environmental Conditions (Choose one per line)				
<u>Item</u>	<u>Frequency of Occurrence</u>			
	Never	Occasionally	Frequently	Continuously
Low temperatures.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
High temperatures.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outdoor elements such as precipitation and wind.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Noisy environments.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hazardous conditions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poor ventilation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Small and/or enclosed spaces.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No adverse environmental conditions expected.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>