Instructions for Using the Primary Duties Worksheet

The worksheet will help you develop your Primary Duties statements that you will use for your Job Responsibilities Worksheet (JRW). A primary duty 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 8 primary duty 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 the position performs 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 tasks and activities, and reword items that are not 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 be held accountable for achieving? Write a clear, concise statement that describes the Primary Duty in the *Primary Duty* box.
5. Once you have drafted all the Primary Duty Statements, you may want to review with your supervisor now. Do they accurately and thoroughly describe the position? If not, modify as necessary.

The following page shows an example of how the worksheet can be used for a position, “Events Assistant.”

Primary Duties Worksheet—*Example*

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| **Position:** | Events Assistant |

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| **Tasks & Activities** |  | **Related Groupings** |  | **Primary Duty Statement** |
| * 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 |  | * Transport and deliver furniture and equipment to appropriate location * Verify furniture and equipment deliveries * Assemble furniture * Inspect furniture and equipment for damage |  | * Coordinate the receipt and set-up of furniture and equipment   + 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 |
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|  | * Prepare and serve breakfast and lunches for meetings   **ILLUSTRATION**   * Wash dishes/utensils and put in storage * Take meal orders for meetings and events * Charge cost of meals to departments * Order food and supplies |  | * Coordinate all aspects of meal service for internal meetings and events by   + 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 |
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|  | * Order office supplies * Monitors inventory of office supplies * Prepare requisitions for special orders for supplies |  | * Maintain office supplies inventory by   + Monitor supply inventory, replenishing as necessary   + Preparing and processing requisitions for special orders |
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Primary Duty Worksheet

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| **Position:** |  |

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| **Tasks & Activities** |  | **Related Groupings** |  | **Primary Duty Statement** |
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| **Tasks & Activities** |  | **Related Groupings** |  | **Primary Duty Statement** |
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