# CHECKLIST | CREATING A JOB DESCRIPTION

Presented by Franconia Insurance & Financial Services

Crafting an effective job description is a crucial step in attracting top talent and ensuring a successful hiring process. A job description summarizes a position's essential tasks, duties, responsibilities and required qualifications. It usually includes valuable details such as the organization's mission and culture as well as the position's salary and any benefits.

An effective job description can provide applicants and employees with clarity regarding the type of work to be performed and how that work relates to the organization's operational goals. It's also critical for establishing job titles, directing performance reviews, guiding career planning and ensuring compliance with federal, state and local laws.

This checklist can guide employers through the key steps of creating effective job descriptions. Because this process may differ based on an organization's size and other factors, the steps in this list should be modified to meet the unique needs of an organization. This checklist can be referenced by supervisors, managers or HR representatives to ensure important steps aren't missed when creating job descriptions.

| Performing a Job Analysis | Completed |
|---|---|
| Gather all necessary information related to the job's task to create an accurate job description. This can be accomplished by doing the following:<br>• Interviewing employees to understand what tasks are being performed<br>• Observing employees to determine how tasks are being performed<br>• Surveying employees regarding tasks being performed | ☐ |
| Review all information collected that relates to the job's tasks to determine whether any changes need to be made regarding the job's required knowledge, skills, abilities, physical characteristics, qualifications, credentials and experience. | ☐ |
| Establish the job's essential duties, responsibilities and requirements, including day-to-day activities. | ☐ |
| Collect market research to benchmark salary levels for the job. | ☐ |
| Set a salary range for the position and determine all benefits and perks. | ☐ |
| Decide the job's reporting relationships and location. | ☐ |
| Determine any application deadlines and related requirements, such as references, writing samples or educational transcripts. | ☐ |

| Drafting the Job Description | Completed |
|---|---|
| Draft the job description in a way that reflects the organization's values and culture. | ☐ |
| Provide a brief description of the organization, including what it does and its mission. | ☐ |
| Use inclusive language and avoid unconscious bias or gendered terms. | ☐ |
| Consider providing information outlining the organization's ideal candidate for the job. | ☐ |
| Provide application instructions and any deadlines or other application requirements (e.g., a resume, references, writing samples and educational transcripts). | ☐ |
| Include contact details for candidates to reach out to with any questions. | ☐ |
| Review the job description to ensure it is accurate, complies with all legal requirements and is consistent with the organization's overall mission. | ☐ |

| Ensure the job description contains the following items: | Yes | No | N/A |
|---|---|---|---|
| • The job title | ☐ | ☐ | ☐ |
| • A brief summary and overall objectives of the position | ☐ | ☐ | ☐ |
| • All essential and nonessential functions of the job | ☐ | ☐ | ☐ |
| • All required education, experience, skills and other key qualifications for the job | ☐ | ☐ | ☐ |
| • Any preferred education, experience, skills and other key qualifications for the position | ☐ | ☐ | ☐ |
| • Additional eligibility requirements for the job, such as certifications or industry-specific experience | ☐ | ☐ | ☐ |
| • Physical requirements for the position | ☐ | ☐ | ☐ |
| • The job's base salary or hourly wage and payment schedule | ☐ | ☐ | ☐ |
| • An explanation of the position's bonus structure, if applicable | ☐ | ☐ | ☐ |
| • A summary of the job's benefits (e.g., paid leave and health benefits), if applicable | ☐ | ☐ | ☐ |
| • Any supervisory responsibilities for the position | ☐ | ☐ | ☐ |
| • The job's reporting structure | ☐ | ☐ | ☐ |

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|---|---|---|---|
| • The department the position is part of | ☐ | ☐ | ☐ |
| • The job's work location, including whether it's remote or hybrid, and any other travel requirements | ☐ | ☐ | ☐ |
| • The position's working conditions, including any requirements or exposures in the work environment (e.g., extreme temperatures, noise or fumes) | ☐ | ☐ | ☐ |
| • The job's status (e.g., full time, part time, regular, temporary, specific duration, exempt or nonexempt) | ☐ | ☐ | ☐ |
| • An affirmative action plan or equal employment opportunity statement | ☐ | ☐ | ☐ |
| • The date the job description was drafted or last reviewed | ☐ | ☐ | ☐ |
| • A disclaimer stating that the job description is not comprehensive and is subject to change at any time | ☐ | ☐ | ☐ |

A well-crafted job description is a critical tool for organizations to attract qualified candidates and ensure successful hiring processes. This checklist can help organizations review or draft effective job descriptions.

For more information about creating job descriptions, contact Franconia Insurance & Financial Services today.