UGA Office of Human Resources

Positions Management & Classification

An Overview of Positions Management and Classification

Three Functions of Human Resources

- **Positions Management & Classification**
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- **Onboarding**
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Functions of PM&C

- Ensure that all UGA staff members are correctly classified for the duties they are performing, ensuring equity among employees and fair wages for duties performed
- Review the structure and job classifications that are currently being used at UGA, adding more classifications as necessary to capture new types of work being done at UGA and removing outdated or redundant classifications
- Provide training and support to departments

How Position Management Helps You Manage Your Workforce Better

- Using position management to manage your workforce is not just for organizations with employees working multiple positions, but can be applicable and beneficial to any organization. Position management is a type of relationship between positions, jobs, employees and the organizational structure. A position is seen as an empty chair that inherits and maintains job information and employees fill those empty chairs. Position management can used by businesses with employees who work in multiple tax jurisdictions or are replacing coworkers on leaves of absence. It can also simplify recruitment, streamline the succession planning process, and more.

Recruitment

- With position management in place, every position in your organization exists independent of your employees, whether it is filled or not. This means your recruiters will always know the current staffing levels. They'll know the exact number of vacancies at any time so they can hire the right number of people. With accurate tracking of vacancies, you can reduce the possibility of over hiring, needing to retract job offers, or going over department budgets due to additional personnel costs. With effective-dated positions, your recruiters can even see into the future, anticipating any gaps in your staffing levels. This ensures that your company is always adequately staffed at all times.
- When a position is static and people can move in and out of them, it's easier to know what is needed to be successful in that position. This gives your recruitment team a more accurate list of traits to look for in applicants, which increases the fit of a hired candidate to the position. A better fit also decreases turnover during the probation period, saving time and money and improving employee morale.

Talent Retention/Management

- It is inevitable that some employees will want to take on new responsibilities, roles, and broaden their horizons. For employers, this can mean different salary amounts, allowances, vacation and sick time, benefits and deductions for different positions. Depending on the accounting structure, this could also lead to dividing the salary cost and scheduling of employees between departments, cost centers, projects and locations.
- So how do you effectively manage this while still providing employees, your top talent, all the opportunities they seek? With position management, you can easily move people into new positions as well as assign them more than one position and still track vacancies. It allows employees to change positions in the company while maintaining the organizational structure. This means employers can tap into the skillsets of their employees without impacting the management of vacant positions.

Administration

- With position management, it’s easier to make mass updates to job-related information without having to worry about making individual changes to each of your employees. Position templates with job and position data stored on them can be used to reduce the amount of overhead when creating positions. Positions can even be reused, which also helps to significantly cut down administrative time. With effective position management, your administrative staff can operate at the highest efficiency and spend less time maintaining your system and more time supporting your employees .

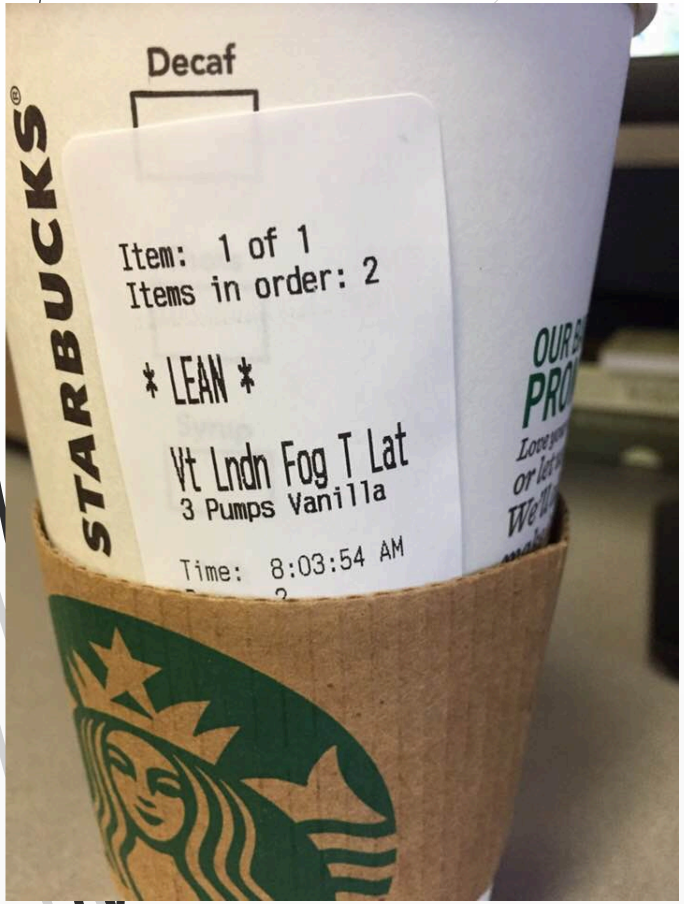
Payroll

- Payroll is already complicated enough; however, with the added challenge of employees taking on more roles and responsibilities, it can seem almost insurmountable . Position management in payroll makes it easier to pay employees who are taking on more than one role or involved with multiple projects.
- In cases where you're paying people who working in more than one tax jurisdiction and each one has a different rate of tax and deductions, position management can be invaluable. An employee can have one position for each jurisdiction they work, so that the hours they worked in each location are taxed at the correct rates. By using position management, you can also maintain benefits and deductions specific to a position. This way, you can easily ensure that an employee gets the appropriate benefits and deductions when only working in that position.
- With position management, an employee can also have multiple positions that each have their own rates of pay, benefits, deductions, allowances, commission rates and more.

Management

- Position management pushes you to evaluate the value of each position as a distinct seat in the company that represents a real business need. This way, a uniquely identified position must be created instead of a general job code that can be assigned to multiple employees. This also means that each position must be vetted and budgeted for before it can be created.
- With position management, it becomes easier to manage a dynamic workforce. It can aid succession planning by allowing you to build a position roadmap to fill key positions, as well as record the essential skills needed be successful on each position. This helps employers guide new employees into developing the skills they need to excel in their role.
- If jobs and job descriptions are fairly static, position management could be the direction to take for your organization. With position management, it also becomes much simpler to manage the movement of your employees within your company. Regardless of whether employees have more than one position or not, position management has a range of far-reaching benefits that are worth evaluating for your company's success.
- http://www.lokisys.com/2015/12/position-management-manages-your-workforce-better/

HR Terminology



- The Job Classification refers to how UGA groups employees based on the types of work done and the level of pay. Employees performing similar tasks would have the same classification title and pay grade (e.g. all Administrative Assistant II's are non-exempt, pay grade 43).

- A Working Title is an optional title that a department may choose to give the position in order to differentiate between positions within a unit or provide some other detail (e.g. "Admin Assist- Warehouse 4")

- The Positon Summary is a summarized description, in narrative form, of the work that one specific position will perform. Will vary from position to position.

- Duties and Responsibilities- Highly specific breakdown of duties, in terms of percentages of time, that the position will hold. Will vary greatly from position to position.

Job Families

A Job Family is a grouping of job classifications that follows a natural progression from lower/non-exempt levels to the upper/exempt levels while still involving a similar skillset. Examples include:

- <u>Administrative Series</u>: Administrative Assistant I&II →Administrative Associate I&II→Administrative Specialist I&II
- <u>Research Series</u>: Research Assistant→Research Technician I-III→Research Professional I-IV
- <u>Program Series</u>: Program Specialist I&II→Program Coordinator I-IV

True or False?

An excellent employee, performing their normal duties with a high degree of competence over a long period of time, should expect to gradually progress through the job family through promotion/reclassification

False!

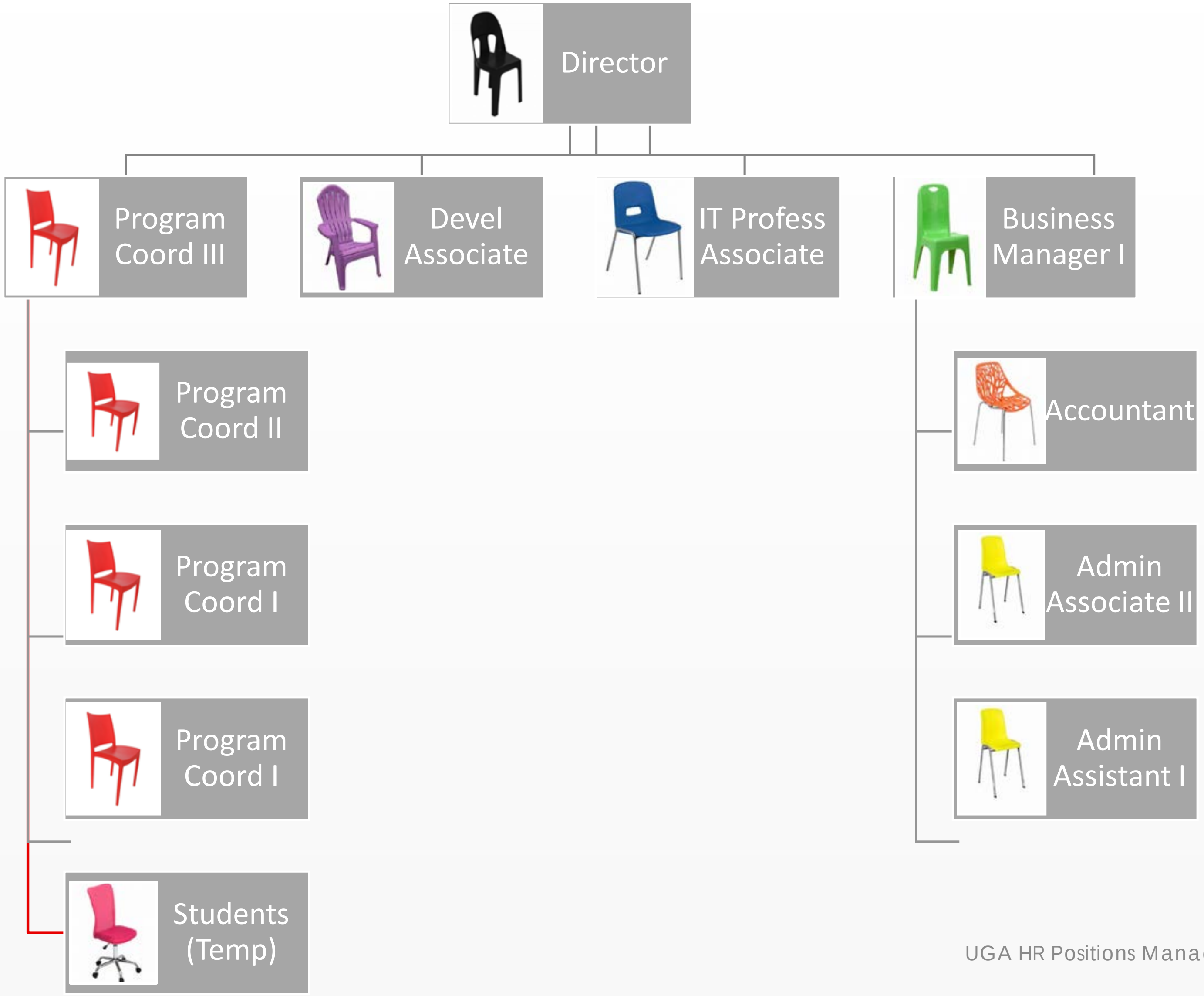
Progression in the job family is NOT a method of recognizing superior job performance.

- Job classification is a completely separate issue from the employee’s performance.
- The employee’s job classification should accurately capture and reflect the duties that the position performs.
- Recognition of superior performance on those tasks can be addressed by other means such as merit raises and Requests for Salary Action.

Think of your department's necessary positions in terms of CHAIRS.

- You have one chair for each position in your department.
- To sit in a chair, you perform the necessary duties associated with that chair.
- If you have people seated in all of these chairs as classified, then that should suffice to accomplish all of the work of your department.

Hypothetical UGA Program



What if the chairs in my department do NOT accurately reflect the work of the employees?

aka: what if our people are sitting in the wrong seats?

There are three kinds of classification actions:

- New
- Modify
- Evaluate

“New” Actions can best be understood as being “public” searches. Initiate a New action when:

- …your department needs to hire an additional person (i.e. add another chair).
- …to fill a vacant chair. A New action will result in HR creating an external or internal (PEP) posting to fill it.
- …to make transparent the process of promoting someone from within the university, by allowing eligible employees to compete for a chair. This can be done with an internal (PEP) posting. Remember that we keep separate the chair and the person sitting in it. If it has become clear that a position has grown from one chair size to another chair size, then we still have that “new” chair to bring to the table and before we can seat someone in it.

Modify Actions are for minor administrative changes

- You can Modify a Position Description when a minor change needs to be made to an existing position, such as a change in supervisor or a change in budget number. A Modify should not be used to make changes in classification or duties.
- Use a Modify to vacate an employee
- Modifies should NEVER be used to transition a non-managed (NBE) employee to a permanent position, even if you have an available budget number.

Evaluate Actions are initiated to make more significant changes to a position, such as:

- ...elements of the job description have become outdated and need to be corrected to accurately capture the work currently being done, even though the classification itself remains the same. These updates can be made at any time.
- ...a department may have a vacant position and determine that the department's needs would best be served having the next employee perform different functions than the previous incumbent. In this case, they would pursue a reclassification of the vacant position before it is posted.
- ...in rare cases, a department may realize that a position has evolved over time, so that a current employee is no longer performing the duties that they were originally classified to do. In this case, the department can pursue a reclassification of an occupied position. This would not result in a posting.

Successfully initiating an action: Tips and Helps

- Justification: This section is important as it explains to the PM&C Team why the department is pursuing the action. It can be as simple as “Need to correct budget number” or a detailed narrative of complicated changes.
- Job Classification: Choose the classification you believe to be correct. If the PM&C Team has questions, we will contact you for clarification. If you want to review the possible classifications, full descriptions can be found in Ipaws (not UGA website) in the Position Management (orange screen) mode under the “Classifications” tab.
- Position Summary: Think of this as a CV/Resume-like overview of the work that the position performs.
- Duties & Responsibilities: Group the position’s duties in a logical manner and determine the percentages of time that the employee is expected to spend on each. There should be ideally no more than 6 types of duties, and no fewer than 5% of time allocated to each.

Tips & Helps, continued

- Language: Keep in mind that the PM&C Team uses the language of your action to understand the function of the position.

  Words like ***Assists, Implements, Helps*** and ***Under Direction*** suggest non-exempt, non-supervisory type duties

  Words like ***Supervises, Coordinates, Manages***, and ***Budgets*** suggest exempt level work.

- Major Changes: This is a new field added in late 2017, and is especially important in processing reclassification actions. Use this field to explain and list the specific ways that the position's duties have changed. This in combination with the Duties section will have great weight in the team's determination.

Tips & Helps, continued

- FLSA Determination: If the job classification is non-exempt, then you can simply put in **n/a** for the test. If, however, the position is exempt, then indicate which test you used for the determination.
- Budget Position Number: Enter the number without spaces (e.g. 111AAAAA11A, rather than 111_AAAAA_11A)
- Seated Employee: Be sure to vacate the position if the employee is terminated/if the posting is for a replacement.
- Job Evaluation Packet- With the new IPaws system, it is no longer necessary to attach a JEP for reclassifications. You should, however, still attach other pertinent documents such as the employee's CV, the department's RTF (Request to Fill), a UGA Supplement Request form, etc.

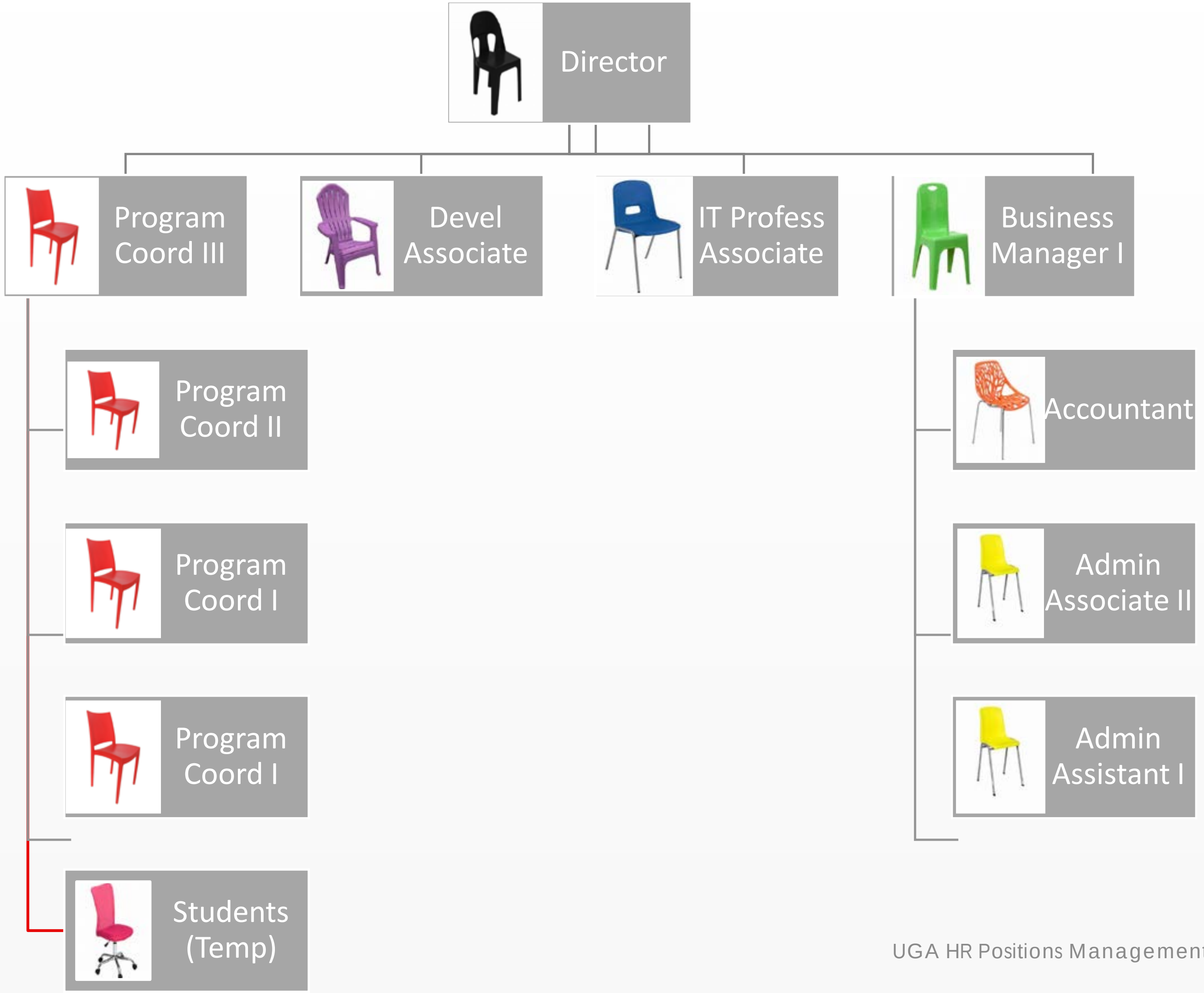
Tips & Helps, continued

- Organizational Charts, current and proposed: the PM&C Team has been enforcing the necessity to have org charts recently, because we need to confirm the reporting structures of departments in preparation for the OneSource implementation on the horizon. It is also necessary for the review of reclassification actions.

POP QUIZ!

Refer to the Org Chart for the Hypothetical UGA Program

Hypothetical UGA Program



The Development Associate now reports to the Business Manager I, instead of the Director.

New, Modify, or Evaluate?

The Development Associate now reports to the Business Manager I, instead of the Director.

MODIFY!

This is a minor administrative change to the Position Description and can be made with a simple Modify Action.

The department's IT needs have evolved over time, changing how your IT Professional Associate allocates their time throughout the workweek.

New, Modify, or Evaluate?

The department's IT needs have evolved over time, changing how your IT Professional Associate allocates their time throughout the workweek.

EVALUATE!

If the job classification is accurate, but the duties have changed, then initiate an "Evaluate" Action.

The program is growing and needs an additional Administrative Assistant.

New, Modify or Evaluate?

The program is growing and needs an additional Administrative Assistant.

NEW!

Create a “New” action and this will result in a posting for the position.

The Business Manager is a highly valued member of the team, always dependable, and sometimes operates under situations of pressure. They need to be recognized for their exceptional work.

New, Modify, or Evaluate?

The Business Manager is a highly valued member of the team, always dependable, and sometimes operates under situations of pressure. They need to be recognized for their exceptional work.

NONE OF THE ABOVE

If the employee duties are correctly captured in their current job description/classification, then no action needs to be taken via Position Management & Classification.

The Program Coordinator I with the greater seniority has slowly been picking up extra duties and is now evidently doing the work of a Program Coordinator II. You feel that they should be reclassed accordingly.

New, Modify or Evaluate?

The Program Coordinator I with the greater seniority has slowly been picking up extra duties and is now evidently doing the work of a Program Coordinator II. You feel that they should be reclassed accordingly.

NEW!

Irrespective of the employee, the department is saying that they now need a new Program Coordinator II chair brought to the table and that is the focus of our action. Furthermore, even though the position is already occupied, the department should still conduct a formal search process to allow all eligible candidates to compete for the promotion. It may be evident to the supervisor which candidate is more suitable for the position, but best business practices prescribe a formal search with a posting, to ensure the proper transparency in the process.

When must the department post a position?

Whether it's a new hire or a reclass, post when:

- When multiple current staff at UGA are qualified for the open role
- When there is a potential employee relations or equity issue
- When the position is identified as one that is underrepresented in one or more protected classes
- When the proposed reclassication changes series (job family) or skips more than one position in the series
- When the employee is moving from a temporary to a regular FTBE position
- When the position is currently filled with an employee in an Acting or Interim assignment.

When to appoint the employee (not post)

- The department submits a reclassification request which describes what the employee is doing and the Team classes their duties into a different title and/or grade. The reclassification request typically includes expanded duties that the employee has been doing for 6 months or more.
- Senior management makes a strategic decision based on critical needs of the department and the specialized skill set of the individual. Will need to include the following justification:
  - a) why the individual is being selected for this role (including what criteria was used in determining their assignment), and
  - b) individualized justification as to why others who meet the minimum qualifications of the position are not being considered.
- An employee whose job is being eliminated is qualified for the open position in the department, and will be placed into the role by management. Note: all job eliminations will be reviewed with the unit HR Employee Relations team

Reclassing Occupied Positions

- If the department chooses to pursue a reclass of an occupied position through an “Evaluate” and not post, then the PM&C Team will be in contact with you to schedule an in-person meeting to discuss the action.
- The meeting is solely for information gathering; a chance for Central HR and department representatives to collaborate and share information and to discuss the needs of the program.
- The meeting can take place either in the department or at Central HR on Jackson Street, as may be most convenient.
- The department’s HR representative and the employee’s supervisor should be present.
- Typically two or three members of the Team will be present.
- NO determination will be made at the time of the meeting.

Checklist for meetings with PM&C: What information does the Team need?

- How does the position fit into the larger work of the department? How does the proposed reclassification address the department's needs?
- Explain how the employee's duties have changed over time. Be sure to differentiate between changes in duties as compared to an increase of workload.
- Be prepared to address how the changes in duties are higher level, more complex, or more skilled than they were before (if the duties are different but equally complex, then the current classification may still be appropriate).
- Is the employee retaining their previous duties as well as the newer duties of the proposed classification? Approximately what percentage of their time is being spent on the newer, higher level duties? Is the employee leaving behind duties that someone else will need to absorb?

Checklist, continued

- How long has the employee been successfully performing the new duties?
- Is the existing "chair" still needed, or will it be needed again in the future? Are the changes in the employee's duties temporary/short term? If so, then the position should not be changed.
- Does the employee meet the minimum qualifications of the proposed reclassification?
- Are there other employees in the department who meet the minimum qualifications for the position? If the proposed position is Exempt, give examples of the exempt level work the employee is performing, such as budgeting, supervising, managing, etc.
- The Team will ask any clarifying questions about the Duties and Responsibilities in the action, and may ask for specific examples of work done.

Checklist, continued

- Remember, it is not the task of the PM&C to assess the merit of the employee. The goal of the Team is to simply gain a clear picture of the work the employee is performing, and to determine whether that work is accurately captured in the proposed classification—e.g. what "chair" best fits the duties they perform?
- The Team will usually reach a determination within a week of the meeting.
- If the Team does NOT approve the reclassification, either determining that the position should be posted or determining that the current classification is still correct for the employee, the department may appeal the decision.
- Appeals process: *If a Vice President, Dean, or Administrative head is not satisfied with the determination, a written appeal may be submitted to Lindsey Van Note within ten (10) working days.*

What is the status of our action?

Workflow States in IPaws, as of February 2018 (it may change)

Central HR	Your action has been successfully transitioned to Central HR but the PM&C Team has not yet begun to review it.
Initial Review	A Team member has begun to review the action. The “Notes” section of the action will show who transitioned the action and you may contact them directly with questions.
Further Information Needed	Some complicating issue has been identified with the action and the Team will reach out to address as appropriate.
Position Approved	The Action is approved and ready for you to create the posting if necessary.

Timeline for Determinations

- It is the goal of Positions Management & Classification to review all incoming actions within one week.
- Straightforward or routine actions can often be approved within a few days of receipt. This includes most "Modify" and "New" actions.
- Complicated actions requiring meetings with the department, compensation review, or Employee Relations, may take longer.
- Remember that creating a posting is a separate process after approving the action, and the posting action is handled through the Recruiting Team.

Q & A