**Western Washington University**

**Employee-Requested Position Review Form**

**Employee Portion**

**INSTRUCTIONS**

This form should be utilized by any classified employee seeking a position review.

Please review the following information as well as the [Frequently Asked Questions](http://www.wwu.edu/hrdocs/lr/FAQReClassification.pdf) regarding position reviews.

**Required Documents**

For an employee’s position review request to be fully submitted, the following documents must be submitted to Human Resources:

1. Updated [Position Description Form](http://www.wwu.edu/hrdocs/emp/Position-Description-Classified-Staff.docx)
   * Additional guidance on creating/editing a position description is provided on HR’s Classified Classification & Compensation website
2. Employee-Requested Position Review Form, Employee Portion
3. Updated Organizational Chart
4. Supplemental materials (not required)

Once the employee has submitted these materials, HR will contact the employee’s supervisor to fill out the Employee-Requested Position Review Form, Supervisor Portion.

The updated Position Description Form and the Employee and Supervisor Portions of the Position Review Forms must be submitted in both digital and hard copy to Human Resources. Please submit the hard copies with original signatures. Please submit the digital copies directly to the Classification/Compensation Manager.

**Notification to Employee**

A position review is a review of the position, not of the employee, so the employee’s individual performance and longevity are not factored into the review. An employee-requested position review is a “look back” over the past six months only; work performed outside of the six-month window is not taken into consideration in the position review. Lastly, the allocation or misallocation of a similar position at Western is also not a determining factor in the appropriate allocation for a position.

A position review may result in either no change in classification or a change of classification that results in an increase, decrease or no change to the employee’s salary. HR urges all employees to consult their union’s bargaining agreement regarding the allocation process and discuss union-specific questions with their union representative. (e.g. PSE-CBA, Article 29; WFSE-CBA, Article 42).

An employee may withdrawal a position review request until the time that HR publishes its allocation decision via email. An employee must notify the Classification/Compensation Manager in writing that they wish to withdrawal their request.

**Position Review Process**

Employee Interview

Once HR has received the employee’s documents and the supervisor’s portion of the position review form, HR will contact the employee by email to set up an interview time to discuss the employee’s position with the employee. The employee should feel free to have their union representative attend the interview. At the interview, HR will be asking questions of the employee that relate to their position. The employee should come prepared to discuss their position and their position review request form. The interview is the employee’s opportunity to tell HR anything that may not be included, or may be unclear, in the position review request; to emphasize key duties/issues/changes in the employee’s position; to draw HR’s attention to specific points; and, most importantly, to present whatever information they may want HR to know about their position.

Supervisor Interview

After HR meets with the employee, HR will meet with the employee’s supervisor to discuss the employee’s position. The supervisor should be prepared to discuss any issues or questions about the employee’s position that they have as well as be prepared to discuss the Supervisor and Employee Portions of the position review form.

HR Allocation Determination & Write-Up

After HR meets with the employee and the supervisor to discuss the position, HR follows the State’s [allocation process](http://www.hr.wa.gov/CompClass/Allocation/Pages/default.aspx). In making an allocation determination, HR reviews the Employee and Supervisor Portions of the Position Review Request form, the employee’s updated position description, the org chart, notes from interviews with the employee and supervisor and any supplemental materials the employee has submitted to HR in support of their position review request.

HR then determines appropriate classification for the position:

1. HR reviews the category concept (if one exists) for a class series. This is often referred to as a “class series concept” in a specification. It is found in the specification for the first level of a class series. Many of the class series concepts utilize words that are specifically defined by State HR in its [Glossary of Classification Terms](http://www.wwu.edu/hrdocs/lr/ClassificationGlossary.pdf). The State’s intent behind the class series concepts are also further described in [State Director’s Reviews](http://www.hr.wa.gov/more/DirectorsReviewsAppeals/DirectorsReviews/Pages/DirectorsReviewDecisions.aspx).

If the position does not fit into the class series concept, the class series is not the “best fit” (the State defines a “best fit” classification as the classification that fits 51% of a position’s duties and responsibilities) for the position and HR reviews additional class series concepts until the “best fit” class series is identified. Once the “best fit” class series is identified, HR moves to Step 2.

1. HR reviews the definition or basic function of the various specifications of a class series to determine which specification “best fits” with the position. Again, the [Glossary of Classification Terms](http://www.wwu.edu/hrdocs/lr/ClassificationGlossary.pdf) can be useful to determine if any of State HR’s words in the definition have a specific or intended meaning.

If none of the class definitions fit, HR will look back to the class series concept and may review additional class series concepts to determine if there is a better class series fit for the position.

1. Once HR finds the “best fit” definition, HR reviews the distinguishing characteristics, again utilizing the [Glossary of Classification Terms](http://www.wwu.edu/hrdocs/lr/ClassificationGlossary.pdf). If the distinguishing characteristics do not fit the position, HR may review additional specifications within the class or may review additional class series concepts.
2. HR reviews the “Typical Work” of the specification. The “typical work” is not allocating criteria, but can be helpful to provide support for the duties typically performed at each level of the class series.
3. In many cases, HR also reviews relevant [Director’s Reviews](http://www.hr.wa.gov/more/DirectorsReviewsAppeals/DirectorsReviews/Pages/DirectorsReviewDecisions.aspx), [Personnel Resources Board decisions](https://fortress.wa.gov/dop/prb/) and [additional guidance](http://www.hr.wa.gov/CompClass/Pages/default.aspx) available on State HR’s website.
4. Pursuant to [State HR’s instruction](http://www.hr.wa.gov/CompClass/Allocation/Pages/DetermineAppropriateAllocation.aspx), Western HR does not consider:

* Volume of work
* Performance of work
* Desired salary
* Comparisons of other employees’ positions (except in terms of determining level of authority of incumbent’s position, supervisory/lead responsibility, etc.)
* Expertise & training (unless a required qualification)
* Seniority

Once the appropriate classification is determined for the position, HR prepares a written decision. The decision may include excerpts from the Employee and Supervisor portions of the Positon Review Request and statements made during the employee and supervisor interviews. The decision will include an analysis of the position’s duties and responsibilities in comparison to relevant class specifications (see above). The decision will also include, if necessary, re-allocation information related to a change in union bargaining unit and a change in the employee’s compensation. Once the written decision is published by HR via email, the decision is final. Other than the statements made by HR in the allocation decision, no discussions or statements by HR during the position review process are binding.

Appeal Process

If an employee disagrees with HR’s decision, the employee may request a State [Director's Review](http://www.hr.wa.gov/more/DirectorsReviewsAppeals/DirectorsReviews/Pages/Howshouldexhibitsbepreparedforthereview.aspx) of the decision from the Director of the State’s Office of Human Resources within thirty (30) calendar days of being provided the results of the position review via email. The procedural information for a Director’s Review is provided at the end of the allocation decision. Please note, if an employee wishes to appeal the decision and submits additional materials to the State in support of their request, the additional materials must have confidential and/or protected information redacted. This includes information protected by FERPA and HIPPA.

**HR suggests that all employees review the Frequently Asked Questions Regarding the Classification Process and discuss any concerns they may have with their union representative prior to submitting a request to have their position reviewed by HR.**

**Western Washington University**

**Employee-Requested Position Review Form**

**Employee Portion**

**Employee Information**

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| **Name** |  |
| **Email and Phone** |  |
| **Current Classification** |  |
| **Current Salary Grade and Step** |  |
| **Current Bargaining Unit** |  |
| **Position Number** |  |
| **Department/College** |  |
| **Division** |  |
| **Supervisor’s Name, Title and Position Number** |  |

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| **PREVIOUS POSITION REVIEW**  Have you had a previous position review completed for this position? If so, please provide, to the best of your recollection, the previous classification of your position and the date the review was completed. |
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| **POSITION PURPOSE**  In one paragraph, explain the purpose of your position and the main reason(s) your position exists. |
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| **WORK ACTIVITIES (Duties and Tasks)**  Describe, in order of importance, your major duties (those which take at least 2 hours per week or 5% of your time to perform). The Washington State HR’s website has additional resources to assist with this portion of your position description:  [Essential Functions Guide](http://www.dop.wa.gov/WorkforceDataAndPlanning/WorkforcePlanning/Pages/EssentialFunctionsGuidance.aspx) and [Examples of Work Statements](http://www.dop.wa.gov/SiteCollectionDocuments/Strategic%20HR/Workforce%20Planning/Examples_of_Work_Statements_06.2011.doc) | | | |
| **% of time**  **(Must total 100%)** | **Description of Major Duty and Supporting Tasks** | | |
|  | **Major Duty:**  **How Long Have You Been Performing This Duty?**  **Tasks include:** | | |
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| **DUTIES THAT HAVE CHANGED**  Identify the duties that have changed since your position was last reviewed. If you have never had a position review completed for your current position, please identify the duties that have changed since you started in your position. | | | |
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| **NEW CLASSIFICATION**  List the classification that you think better describes your duties and responsibilities and explain why. | | | |
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| **LEAD WORK/SUPERVISORY RESPONSIBILITIES** | | | |
| **Lead:** An employee who performs the same or similar duties as other employees in his/her work group and has the designated responsibility to regularly assign, instruct, and check the work of those employees on an ongoing basis.  **Supervisor:** An employee who is assigned responsibility by management to participate in all of the following functions with respect to their subordinate employees: selecting staff, training & development, planning & assignment of work, evaluating performance, resolving grievances, taking corrective action. Participation in these functions is not routine and requires the exercise of individual judgment. | | | |
| Is this a Lead or Supervisory Position? | Lead Supervisory Neither Lead nor Supervisory | | |
| For each student or staff employee that you lead or supervise, please provide the following information: | | | |
| **Name, Position Number and Title of Employee** | | **Student or Staff Employee?** | **Hours Per Week** |
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| **DECISION MAKING AUTHORITY** | | | |
| List examples of decisions you are authorized to make without consulting your supervisor. Indicate which of these decisions are the most difficult or complex. | | | |
| List examples of decisions that require your supervisor’s approval. | | | |
| **FISCAL RESPONSIBILITIES** | | | |
| Do you have responsibility for maintaining fiscal records? Yes No  Do you have responsibility for controlling or authorizing the expenditure of funds? Yes No  If **yes**, explain how you control or authorize funds:  If you control or authorize funds, please complete the following information regarding the funds that you control and/or authorize:   * Total Funds for which you have responsibility: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   + Total Annual State Funds: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   + Total Annual Grant and Contract Funds: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   + Total Number of Grants and/or Contracts: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   + Total Annual Self-Sustaining Funds: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | |

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| **ACKNOWLEDGEMENT OF POSITION REVIEW REQUEST**  A position review may result in a change of classification that results in an increase or decrease of an employee’s current salary range. A position review also may result in no change of allocation and/or no change in an employee’s current salary range. An employee may withdraw a position review prior to HR’s final written allocation determination. HR urges all employees to consult their union’s bargaining agreement regarding the allocation process. (e.g. PSE CBA, Article 29; WFSE-CBA, Article 42).  The signatures below indicate that the employee and supervisor have read and acknowledge the “Required Documents,” “Position Review Process,” and “Notification to Employee” sections at the beginning of this Position Review Form and the information contained herein.  By signing this form, the employee is acknowledging that the information provided herein is true and correct. |
| **EMPLOYEE ACKNOWLEDGMENT**  This form was completed by: Employee Only Employee in consultation with Supervisor  Employee’s Signature (required): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Employee is responsible for submitting this form to HR. This form must be submitted in hard copy with original signatures. A digital copy of this form must also be submitted. |
| **SUPERVISOR ACKNOWLEDGMENT**  As the Supervisor, I acknowledge that the above employee is submitting this request to have his/her position’s allocation reviewed. I understand that I am required to complete the “Employee-Requested Position Review Form, Supervisor’s Portion” and return a hard copy and digital copy of the form to Human Resources in a timely manner. I understand that the Supervisor’s Portion is where I will note my agreement or disagreement with the Employee’s Portion of the Position Review Request Form.    Supervisor’s Signature (required): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

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