

REQUEST TO OPEN A PERSONNEL REQUISITION

Supervisory Org: _____ Phone/Ext.: _____

Division/Dept. Name: _____ Hiring Mgr.: _____

Internal Job Title: _____ University Title: _____

Job Code: _____ Region #: _____ Worker Sub-Type: _____

Office Location: _____ Exempt: Yes No Union: Yes No

Scheduled Weekly Hours: _____ Work Shift: _____ % of Time: _____ Months: _____

Maximum Hiring Budget (rate/month or rate/hour): _____ Account #: _____

Check all applicable:

New Position

Fixed-Term Position

Existing Position (Replacement)

End Date: (MM/DD/YY): _____

Last person: _____

Overlap Position

Position #: P _____

End Date: (MM/DD/YY): _____

JUSTIFICATION TO OPEN POSITION – COMPLETE ATTACHED APPENDIX

Adds to headcount? Yes No

If yes, what has changed in the business requirements and/or volume of work that requires additional headcount? _____

If replacement, explain why position is key or critical to operations? _____

Describe the workforce analysis/business rationale performed regarding distributing work to current/existing headcount. What were the results? _____

- Select: Funding approved in FY 2017-18 budget
 Secured as part of a budget request for new money on: _____
 Provost Meeting
 CFO Meeting

DEPARTMENTAL SIGNATURES

Hiring Mgr.'s Supervisor: _____ Title: _____ Date: _____
Finance Mgr. or Designee: _____ Title: _____ Date: _____
(If required)

DIVISION HEAD REVIEW & SIGNATURE

Signature: _____ Title: _____ Date: _____

Staff Position Management Guidelines

APPENDIX – POSITION MANAGEMENT DECISION TOOL

Department: _____ Date: _____

Manager: _____ HR Partner: _____

Job Code: _____ Job Profile: _____ Business Title: _____

Workforce analysis and planning provide the means for achieving overarching organizational goals. Goals will not be achieved “without the right number of people with the right skills in the right place at the right time.” Key factors embedded in sound position management and control practices include effective organization design and succession planning. The position management guidelines provide a uniformed and disciplined approach for assessing staff and financial resource requirements for accomplishing required work. Hiring managers must adhere to these guidelines when evaluating vacated positions, or establishing new positions, including temporary and contract workers.

The first step is to determine whether a vacancy must be filled.

Step 1: Will the vacancy be filled?

To answer this question, hiring managers should apply position management principles in assessing their options. The following checklist includes considerations when reviewing a vacancy, or determining need for a new position. For each item, initial in the appropriate Yes/No column your response to the item question:

Item #	Item Description	Yes	No
1.	Have you completed a Position Management Review of your organization review in the past twelve months? If not, complete using the following guidelines.	_____	_____

Position Management Review

- What work needs to be completed? Only positions for which there is a valid need based on organizational goals, workload, and funding should be created or continued.
- Is the current structure efficient, effective, and in line with organizational goals?
- Do any duties need to be added, removed, or changed?
- Does the position description adequately and accurately reflect assigned duties?
- If the position is supervisory, have you assessed the span of control and considered whether it should be maintained at the same level?

Item #	Item Description	Yes	No
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Workforce Analysis – The primary elements of a workforce analysis involve a review of the items listed below:

- | | | | |
|----|---|-------|-------|
| 1. | Did you examine whether the work could be redistributed, or if there is any duplication or overlap of function? | _____ | _____ |
| 2. | Did you determine whether or not the vacant position is critical, and if the key competencies associated with this position are or can be shared with another position? | _____ | _____ |

Item #	Item Description	Yes	No
3.	Did you evaluate the current headcount including anticipated turnovers?	_____	_____
4.	Did you forecast the optimal headcount and competencies needed to meet future business needs?	_____	_____
5.	Did you evaluate the gap between the supply and demand of the required skill sets or competencies to identify headcount and competency surpluses or deficiencies?	_____	_____

Balanced Workforce – Assess the workforce to establish a balance between entry-level and mid-level positions, and to consider workforce competence to address future skill gaps.

1.	Have you assessed what skills are currently vital to the accomplishment of goals and objectives? Did you identify the current skills and competencies of the workforce required?	_____	_____
2.	Have you addressed skill imbalances or gaps due to attrition including retirement over the next two (2) years, and the potential impact?	_____	_____
3.	Have you explored training or recruiting options for filling competency gaps?	_____	_____
4.	Have you considered addressing skill gaps through acquiring and developing entry-level employees for vacancies?	_____	_____

Based on Position Management Review and workforce analyses, the hiring manager, in consultation with his/her manager and HR partner, is equipped to make an informed decision on whether the vacancy should be filled. A decision not to fill the vacancy ends the process, and documentation is maintained for future consideration.

Step 2: Filling the Vacancy

If the decision is to fill the position, the following items are to be considered:

Item #	Item Description	Yes	No
Recruitment Strategy – Hiring managers must maintain an active recruitment strategy for future vacancies. Incorporating diversity outreach into workforce planning and succession management is imperative to achieving goals.			
1.	Have you engaged your HR Partner to ensure your efforts are aligned with all hiring initiatives?	_____	_____
2.	Have you conducted ongoing recruitment efforts to develop a pool of likely candidates?	_____	_____

Item #	Item Description	Yes	No
3.	Have you discussed diversity recruitment options, including veterans and people with disabilities?	_____	_____

Succession Planning – Succession planning involves developing a plan to address workforce needs as current employees leave due to retirement, attrition, and other factors.

1.	If this is a leadership position, did you consider alternatives such as a development opportunity for a current staff member, or integrating the position's work into another area?	_____	_____
2.	If appropriate, did you consider retention strategies for incumbent with highly critical competencies or essential institutional knowledge?	_____	_____