Professional Employment Redesign Training for HR Professionals

Illinois Human Resources

August 2018

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Agenda

- Introduction
- Overview
- Exemption Criteria
- Staff Vacancy – new workflow
- Job description
- Specialty factors
- Hiring process

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Overview

- State Universities Civil Service System (SUCSS)
    - All public Illinois universities are part of SUCSS
    - Merit Board oversees SUCSS and is composed of Board of Trustees members from the universities
    - All University of Illinois positions are governed by the State Universities Civil Service Act
    - Required by law to be classified as Civil Service (CS) unless exempted by criteria set forth in the procedures manual

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History of Exemptions

- University Civil Service Merit Board delegated exemption authority to State Universities in 1998
  - Origin of standard titles (Specialist, Coordinator, etc.)
  - Before 1998, Academic Professional (AP) positions exempted by SUCSS

- Audit citations about exemptions

Audit	PAA Positions Reviewed in Audit	PAA Positions Cited
2015	230	102*
2013	320	289
2011	200	122
2009	150	101

- Office of the Executive Inspector General (OEIG) investigation about exemptions

*Cited, but omitted from final report pending exemption process revisions

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Exemption Procedures Manual Change

Merit Board and SUCSS have finalized changes to their Exemption Procedures Manual

- Effective October 1, 2018

- Revised criteria for exemption

- Triennial review of currently exempted Academic Professional (AP) positions
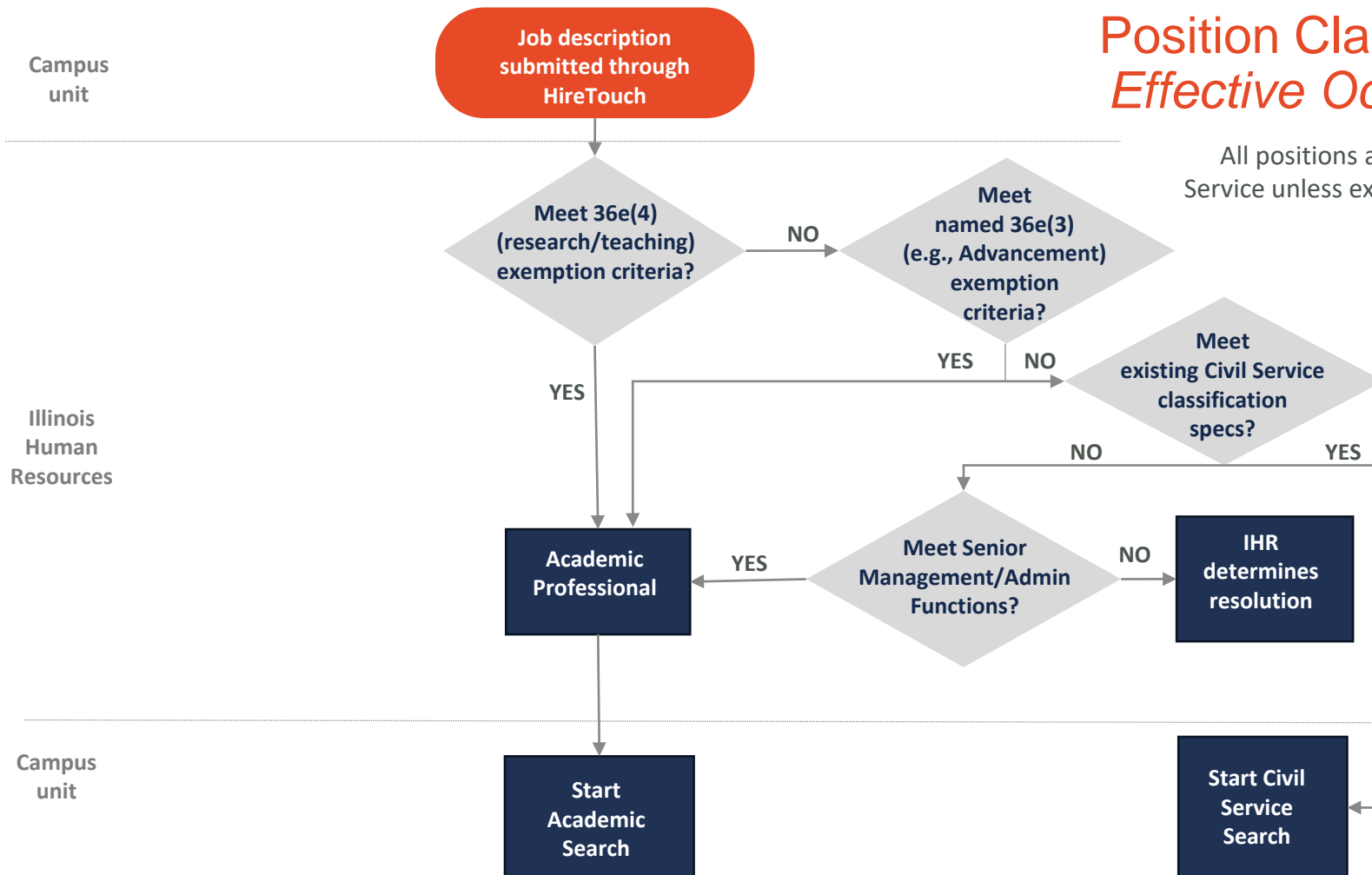
- SUCSS authority to require reclassifications

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Exemption Criteria

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Exemption Terminology

- 36e(3) – Principal Administrative Appointments

  - "Standard titles" like Specialist, Coordinator, Assistant Director are how we've been exempting APs 1998 to now

  - "Senior management/senior administrative functions" is a new term for positions still exempted as administrators

  - "Named exemptions" are specific groups in the new procedure manual (e.g., advancement and Executive Directors)

- 36e(4) – Research and teaching positions

Position Classification
Effective Oct. 1, 2018

All positions are designated Civil Service unless exempted under 36e

Campus unit

Job description submitted through HireTouch

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Meet 36e(4) (research/teaching) exemption criteria?

NO → **Meet named 36e(3) (e.g., Advancement) exemption criteria?**

YES

Meet existing Civil Service classification specs?

YES ↓

NO

Academic Professional

YES ← **Meet Senior Management/Admin Functions?** → NO → **IHR determines resolution**

NO

YES

Campus unit

Start Academic Search

Start Civil Service Search

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What Exemptions Are Preserved?

Chancellor and Provost (including Vice, Assistant and Associate)	All faculty, as defined by the institution • Tenure and non-tenure system	Academic Advising
Executive Director	Deans, with primary administrative responsibility for *faculty* • Assistant and Associate	Student academic recruitment positions
Executive Policy Advisors for • Chancellor (& modified) • Provost (& modified) • Executive Director	Research • Positions primarily engaged in research activities	Residence Hall Directors
Directors • Associate and Assistant Directors may be more challenging to exempt	Teaching-related positions, including: • Tutoring • Mentoring • Instruction for both credit or non-credit offerings (adult education, continuing education, ESL)	Professional licensed/certified to practice (and practicing) within respective field (such as physician, attorney, engineer, architect, mental health counselors)
	Non-traditional instruction: athletic coaching (teaching the sport)	Fundraising, advancement or development positions (primary duties)

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Exemption Criteria

- Much bigger difference between 36e(3) and 36e(4) than in the past
  - 36e(4) explicitly includes groups which were ambiguous in the past (e.g., student recruitment)
  - Hybrid administrative/teaching or administrative/research positions classified by the majority of duties

- Academic Hourly positions must meet the same exemption criteria

- Renewed emphasis that CS positions do have significant independence and authority

- Senior management is a very high threshold

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Staff Vacancy Workflow

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Key Concepts

- New process is employment-group neutral

- Illinois Human Resources (IHR) classifies the job

- Positions are CS by statute unless they meet exemption criteria

- Positions that match CS classification specification must be CS

- One HireTouch workflow per position

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Staff Vacancy HireTouch Workflow

- Proposed job title / working title

- Position number & details
  - Combination of PAPE and Civil Service Employee Requisition (ER)
  - Facilitate IHR position creation/maintenance
  - Saves unit effort submitting ER as a separate form

- Function and duties/responsibilities

- Proposed minimum qualifications

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AP Position Control

- IHR will create and maintain AP positions as we do with CS positions
  - Need for data integrity
  - Dovetails with triennial review of current AP positions

- IHR will continue to determine position class and exemption coding

- Units retain flexibility to change labor distribution and budget profile

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Process Changes

- One HireTouch workflow per position

- Multiple hires in one CS search
  - New workflow and job description for each position
  - One workflow is actually posted

- Multi-level searches
  - One workflow per level
  - All must be in the same CS classification
  - One workflow is actually posted

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IHR Steps

- Classify position and assign Job Category

- Establish minimum qualifications (AP) or specialty factors (CS)

- Add HireTouch forms and workflow configuration for assigned employee group

- If CS, process ER form internally within IHR
  - ER pulls data from job description form
  - Unit only submits another form for job posting content in overtime-exempt classifications

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Job Category Review

Category	E-Groups	FLSA Overtime Eligible
Faculty	A*, P*	No
Administrative	AP & CS	No
Administrative Support	CS	Yes
Crafts & Trades	CS	Yes
Education & Student Services	AP & CS	Mixed
Research	AP & CS	Mixed
Service Operations	CS	Yes
Technical	AP & CS	Mixed
Off-campus	AP & CS	Mixed

* "A" e-classes are faculty in Banner. "P" e-classes are postdoctoral positions.

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Secure | https://employ.uillinois.edu/admin/jobs/forms/show.cfm?jobID=100902

HireTouch | HireTouch 360 | Report Writer | CMS

Welcome, Philip Stanton | Admin | Logout

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UNIVERSITY OF ILLINOIS AT URBANA-CHAMPAIGN

University of Illinois - Urba

HOME | APPLICANTS | JOBS | POOL | PROSPECTS | RETRIEVE CS APPLICANTS | TASKS | REPORTS | RESOURCES | SETUP

TEST WORKFLOW Human Resource Specialist - Department XYZ

Properties | Applicants | Campaigns | Activity | Processes | Permissions | Forms | Applicant Review

Job Prospects

Job Forms | Form Packages | Comments

Package added successfully

Show Job Forms

Please do not recertify any form after fully approved - contact the appropriate office if you need to make an update to the form.

Form Name	ODEA File Number	Recertify	Recertified By	Recertified On	Action	Approval	Document History	➕ Add/Remove Forms
📝 Hiring Request Form Only								
📝 Hiring Request					Start			Remove
📝 IHR Job Description								
📝 Job Description					Start			Remove

Actions

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None

Job De

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Secure | https://employ.uillinois.edu/admin/jobs/forms/show.cfm?jobID=100902

HireTouch　　HireTouch 360　　Report Writer　　CMS　　　　　Welcome, Philip Stanton　　Admin　　Logout

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University of Illinois - Urbana

| HOME | APPLICANTS | JOBS | POOL | PROSPECTS | RETRIEVE CS APPLICANTS | TASKS | REPORTS | RESOURCES | SETUP |

TEST WORKFLOW Human Resource Specialist - Department XYZ
2-Administrative

| Properties | Applicants | Campaigns | Activity | Processes | Permissions | Forms | Applicant Review | Job Prospects |

Job Forms | Form Packages | Comments

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Please do not recertify any form after fully approved - contact the appropriate office if you need to make an update to the form.

Form Name	ODEA File Number	Recertify	Recertified By	Recertified On	Action	Approval	Document History
Hiring Request Form Only							
Hiring Request					Start		
IHR Job Description							
Job Description		Recertify			View | Re-generate PDF | Edit	Approvals	View History
IHR Background Check Request (Job)							
Background Check Request					Start		
IHR Employee Requisition							
Civil Service Employee Requisition					Start		
IHR Job Posting							
Job Posting					Start		

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Takeaways

- AP position creation/maintenance by IHR
- One workflow per hire (even from the same search/interviews) or per level of multi-level search
- Once the job description is approved by IHR, the process continues in the existing workflow

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Break

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Job Descriptions

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Key Concepts

- Higher threshold for exemption

- Prepare hiring managers that there will be fewer AP vacancies under new criteria

- Want to help you avoid job description rewrites

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Working Titles

- Posted title
- Reviewed/approved by IHR
- Use expected in custom or other overtime-exempt classifications
- Can be the classification title
- Avoid specifically conflicting with other classification titles (e.g., Program Coordinator)
- Avoid specifically conflicting with exempted titles (e.g., Director)

Writing Job Duties

- Brief (1-2 sentence) function summary (a.k.a., "elevator speech")

- List duties in order of importance, with percentages

- Group related duties together

- Describe the "what" rather than "how"

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Writing Job Duties

We advise both "be specific" and that some things are too specific. What we mean is:

- Good specifics clearly identify the position's responsibility

- Bad specifics list procedural details or focus on aspects that don't clarify the level of responsibility

Writing Job Duties

Good specifics example:

- "Acts as final review/approver of all hiring plans for the College of XYZ"

Bad specifics example:

- "Participates in review of hiring plans including undergraduate students, graduate students, extra help, academic hourly, civil service, academic professional, and faculty positions by circulating Excel spreadsheets and ensuring that units meet internal deadline to allow College processing prior to campus review."

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Percentages

- Percentages are required

- Classification decision is based on the majority of the responsibilities

- Estimate percentages based on a "typical" year

- Examples:
  - 5% = annual two-week rush period, little time the rest of the year
  - 5% = a couple hours per week, year-round

Takeaways

- New process is employment-group neutral

- Job descriptions require percentages

- Units should use working titles, including in Banner/HRFE

- Positions are CS by statute unless they meet exemption criteria. Positions that match CS class specs must be CS.

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Specialty Factors

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What Is a Specialty Factor?

- Specialty factors are additional, required <u>minimum</u> qualifications, not preferred qualifications
  - Candidates lacking the required qualifications are not eligible to be considered
  - Avoid unduly narrow qualifications or things typically learned in on-the-job training

- Layered on top of class spec minimum qualifications
  - Can be <u>more specific</u> or <u>more</u> than classification specification minimum
  - Can <u>never</u> reduce the classification minimum qualifications

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Who Approves Specialty Factors?

- Unit requests required qualifications on job description

- IHR reviews the specific wording of any requirements in consultation with the unit.

- IHR approves the need for specialty factors in all cases. IHR requests SUCSS approval if needed.

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Three Types of Specialty Factors

- IHR has the authority to assign specialty factors for custom classifications

- Certain other classification specifications have built-in flexibility
  - Example: Equipment Specialist I classification specification:

MINIMUM ACCEPTABLE QUALIFICATIONS REQUIRED FOR ENTRY INTO:

Level I: Equipment Specialist I   4511(3288)

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. three years of technical, trade, or craft experience, education, and/or training related to one or more areas of equipment specialization

- IHR can request that SUCSS approve a specialty factor for any other classification based on justification the unit has provided

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What Can Specialty Factors Require?

- Focus on required education, experience, and applicable certifications
  - Avoid unnecessarily narrow requirements such as specific processes and systems typically learned on the job

- Avoid "knowledge/skills/abilities" requirements
  - No consistent/objective way to assess knowledge/ability from a resume
  - "Experience including" and "demonstrated experience with" are alternatives

Takeaways

- There are options to customize CS positions, but with awareness of rules and classification specification

- Avoids one-size-fits-all approach of CS classifications, distinguishing positions within a classification from each other

- Specialty factors are minimum qualifications that must be more specific or more than the classification specification

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Civil Service Hiring Process

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Key Concepts

- New process for custom and overtime-exempt CS classifications

    - Started with mandated exemption changes

    - Opportunity to improve existing processes

- New collaborative candidate review for custom classifications

- Units perform CS onboarding

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Hiring Terminology

"Credential assessment" – Type of civil service exam rating applicant on education and experience

"Register" – List of candidates passing exam (70 or above)

"Rule of three" – After scoring, candidates with the top three **scores** on the register are those entitled to interview

"Banded scores" – Custom classification exams with only four possible scores to maximize referrals

"Referral" – The list of candidates entitled to interview

CS Hiring Process Transition

Traditional Classifications

(Orange & Yellow Lines)

CS Overtime Non-Exempt
- Process continues as-is

CS Overtime-Exempt
- Posting flexibility
- Streamlined application

Custom Classifications

(Blue Line)

Custom Classifications
- Posting flexibility
- Streamlined application
- Collaborative candidate review

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Classification Types

Which classifications are overtime-exempt and non-exempt?

- Classifications listed at IHR Civil Service Salary Plan http://humanresources.illinois.edu/employees/current-employees/civil-service/Permanent/salaryplan.html

Which classifications are custom?

- Accounting Associate
- Business/Admin. Associate
- Grants & Contracts Associate
- HR Associate

- IT Manager/Admin. Coordinator
- IT Support Associate
- IT Technical Associate
- More requested from SUCSS

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CS Overtime Non-Exempt

- 30 days between postings

- Each classification's register is used campus-wide

- Posting reflects classification specification

- Current application still needed

- Pre-approval form automated in most cases

- Unique exams, many still in-person

- IHR reviews credentials, administers exams

CS Overtime-Exempt & Custom

Postings initiated by unit for each vacancy/search

- Individualized to unit and position

- Reviewed/approved by IHR

  - Minimum qualifications (including specialty factor)

  - Affirmative Action/Equal Employment Opportunity statement

- Two-week standard duration

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Streamlined application

- Mirrors AP applicant profile

- Greater emphasis on resume

- Pre-approval form automated in most cases

- Automatic exam request upon application completion

- Applicants visible to unit in the HireTouch workflow

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Custom Class Candidate Review

- Custom credential assessments (banded scoring) lend themselves to this process

- Collaborative review, unit and IHR Talent Acquisition Partners (TAPs)

  – Meets IHR's responsibility to enforce Statute & Rules

  – Offers greater unit input similar to search process

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CS Referral & Interview Process

- Each referred candidate is entitled to an interview

- Alternatives to in-person, first-round interviews (e.g., email or phone)

- Consistent interview questions – Upload the questions to HireTouch workflow

- Reasons for non-selection for each candidate

- Salary approval prior to contingent offer

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Civil Service Onboarding

- Units will onboard new hires beginning Oct. 2018

- IHR available to assist with large-group onboarding upon request

- Pre-employment assessments
  - Occur between background check and start date
  - Specified classifications require strength, drug, or medical tests
  - Listed online at http://humanresources.illinois.edu/job-seekers/how-to-apply/civil-service-employees/Job-titles-requiring-medical-evaluation.html

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Takeaways

- CS custom and overtime-exempt

  – Unit creates posting

  – Shift to resume instead of detailed application

  – Applicant must apply directly to each position

  – Units will see all applicants

- Collaborative candidate review for custom classification vacancies

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Conclusion

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Important Dates

New exemption criteria apply to all job descriptions received effective October 1, 2018

9/14 – Submission deadline for guaranteed PAPE processing under current criteria

9/21 – Last PAPE approval under current criteria

9/22 – New criteria apply to all job description reviews

9/26 – Last new posting with PAPE

Oct. 2018 – Units start CS onboarding

2019
– SUCSS Audit
– Triennial review of all AP positions begins

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Need more information? Visit the Professional Employment Redesign (PER) website at http://go.Illinois.edu/ihr-per

Questions? Email us at ihr@illinois.edu

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Resources

- **Current Exemption Procedure Manual**
  https://www.sucss.illinois.gov/ProcMan/manuals.aspx?osm=c40

- **New Exemption Procedure Manual effective 10-1-2018**
  https://www.sucss.illinois.gov/documents/pm/exemption/newmanual.pdf

- **Class specifications**
  http://sucss.illinois.gov/specs/Default.aspx?osm=c19

- **Salary Plan** http://humanresources.illinois.edu/employees/current-employees/civil-service/Permanent/salaryplan.html

- **Pre-employment assessments** http://humanresources.illinois.edu/job-seekers/how-to-apply/civil-service-employees/Job-titles-requiring-medical-evaluation.html

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