

Reclassifications Process for Employee Relations

1. Supervisor submits papers to ER requesting the review for a reclassification or reallocation.

Reallocations are defined in Dane County Ordinance, Chapter 18: Section 18.04; as, (36) Reallocation shall mean a change in salary range allocation for a position(s) or classification based on reasons of internal and/or external equity."

Reclassifications are defined in Dane County Ordinance, Chapter 18: section 18.04; as, "(37) Reclassification shall mean a change in classification to which a position is assigned as a result of evaluation of the duties and responsibilities assigned to that position.

2. Clerk IV logs it (excel personnl/logs/reclass.xls)
 - a. Those that are highlighted yellow are completed.
3. Set up a meeting with the Supervisor (15-20 Min) and then the employee to discuss the reclassification/reallocation. Take notes. We should have a copy of the old and new position description. Ask questions about old/new duties (% changes), who had them prior to this employee, fiscal impact, union issues, level of responsibility, etc...

The review should include the following:

 - a. Preliminary review of the changes that warrant reclassification/reallocation.
 - b. Comparison of the essential functions outlined in the updated position description against the previous position description.
 - c. Comparison of the updated position description with the class specification series concepts. Common factors described in the class spec include:
 - i. Analytical the analytical skill required
 - ii. Authority, Independence to Act- the authority, independence or freedom to act vested in the position.
 - iii. Complexity- the complexity of the program or unit, the problems solved and the difficulty and originality involved in performing the work.
 - iv. Consequence of error- the severity and scope of the impact of errors made in the course of work.
 - v. Decision-making- the decision making skill required.
 - vi. Impact- the impact an employee has on others within and outside the organization. This factor considers the importance and frequency of interaction with various individuals or groups, as well as the effect of these interactions on the department and the institution.
 - vii. Knowledge- the depth and importance of knowledge necessary to perform the work. The application of concepts, principles, and practices from professional disciplines is considered, as is the amount of work experience normally required to perform the duties of the position. The extent to which the knowledge of organizational policies and procedures is required may also be taken into account.
 - viii. Resource management- responsibility for human, financial, space, facilities, information, and material resources.

- ix. Scope and Impact- the scope, or impact that an individual exercises at varying levels within and across the organization. Impact relates to how influential the position is within the organization based on the decision and recommendations rendered.

Factors that are not considered in classifying a position include: performance of the incumbent, longevity of the incumbent, change in volume of work, personality, or financial need.

- d. Compare position to other positions with the employee group/union contract/ managerial pay scale. Compare to positions within current pay range and potential other ranges. IE. Position is currently G14, compare with other G14's and then higher or lower ranges.
 - e. If 51% of job falls into the classification that is where the job is. Class specs are on the web.
4. Do write up of information, save in the shared files (emprl/admin shared/reclass).
In the write up include:
- a. department reason for the request
 - b. your analysis of the changes of the position
 - c. comparisons to other positions in current and other ranges
 - d. recommendation.
5. Write ups for occupied positions go to DOA Director for review and approval.
6. Vacant requests are sent directly to the person who submitted the request and the Director of that specific department.
- a. If a position is currently vacant, but is not:
 - 1. Creating a new classification
 - 2. Changing pay ranges
 - ii. They do not have to go to County Board.
Two (2) examples would be a
 - 1. Current classification to a current classification (not changing pay ranges)
and
 - 2. Bilingual to non-bilingual (or opposite)
7. Effective date of reclassification/reallocation is the next pay period after reclassification/reallocation is completed. However, there is an exception:
- a. If the reclass/title change is to take place after the incumbent has vacated the position. The reclass/title change then becomes effective the pay period after the current employee has vacated the position.
 - b. These requests are submitted to the Department head. They must create a resolution and submit it to County Board.
8. Email out a memo FOR OCCUPIED POSITIONS approving the reclassification/reallocation. The memo should be written to the department supervisor.
Write up should include:
- a. Effective date of the reclassification/reallocation as indicated above
 - b. Range, step and hourly rate the person will move to
 - c. Position #

- d. Name of employee in the position if applicable
- e. What is occurring (ie. Position will be reclassified/reallocated/retitled from P12 to P13).
- f. If the job is a brand new classification.

If a request is denied, ER must send the analysis to the department head and incumbent(s). This will illustrate why the request was denied. They have ten (10) business days to appeal the decision.

HR Analyst will print one copy of the memo and the Clerk IV will scan and email to the following: HR Specialist, budget staff in Admin (Joe Kroll/Helen Anderson), Admin Secretary (Michelle Goldade), HR Director (Amy), Payroll (Cathy Lippart), applicable Employee Group/union president (send to them the new class spec also if new title). The hard copy can then be placed in the reclassification folder. If the position being reclassified has a current incumbent, a copy of reclass memo is filed in the employee's P-file.

FOR VACANT POSITIONS... Must notify HR Director and Employee Group Representative.

- 9. If approved an updated position description and class specification (if applicable) should be done and class specification should be updated on NEOGOV. Old documents should be archived. Positions that are classified in levels I, II, III should be created as separate class specifications, not as one.
- 10. Title changes only: if only changing the job title, don't need to notify EG/union. If changing duties/requirements and title then notify EG/union.
- 11. When calculating new pay for incumbent that is currently receiving longevity pay and is moving to a position that does not receive longevity pay (Professional or Managerial), include longevity in calculation. In order to factor in longevity you must use the IEST screen on EPersonality.
 - i. IEST – LON-INC is the actual rate the employee is earning.

To calculate the pay increase you take the new range step 2 minus step 1 for EG 720, 705 & 65. For Managerial or Professional, take step 3 minus step 2. Add that amount to employee's current pay. Place them in the new scale closest to that amount without going under.
- 12. For positions that receive the 105% pay, you must determine if the reclassification will eliminate the 105%. If the reclassification will eliminate the 105% pay, you factor the rate they are currently earning. If the reclassification does NOT eliminate the 105% pay, you use the rate in the pay scale.
- 13. If the positions create a level I and II and the movement to the level II is based upon time as a I and supervisor evaluation, this is a non-compete promotion. In these cases the supervisor would submit the evaluation and an Employee Action Form to move the incumbent to the level II.
- 14. Final file and write up and memo can go to HR Secretary who will send out all the copies, log the reclassification/reallocation and file the file.

15. Denials can be appealed to the reclassification appeals board. Appeals must be submitted within ten (10) days of the approval.

Bilingual designations:

Positions requested to be designated as bilingual will be a working title, not a classification change. The memo should include the language regarding the bilingual pay in the EBH. Incumbent in position does need to pass the bilingual exam with ER in order to have this designation. Note the appropriate payroll clerk if a position is gaining/losing the bilingual designation. These request are submitted to Greg and can bypass County Board approval.

Reclassification Checklist for Analyst in Employee Relations

- Old position description obtained
- New position description obtained
- Met with supervisor
- Met with incumbent
- Reviewed position to positions within current wage scale
- Compared to other higher/lower wage scales
- Compared to external positions in other County's or companies (if applicable)
- Completed write up and provided to DOA
- Wrote memo of decision and copied to all parties
- Provided information in the memo whether it is a new title
- Provided copy of new title class specification to the Employee Group along with the memo
- Bilingual designation written as a working title in memo
- Updated class spec and new wage scale in NEOGOV
- Archived old class spec

Sample:



CARLOS PABELLON
Director of Administration

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DEPARTMENT OF ADMINISTRATION
EMPLOYEE RELATIONS DIVISION
210 Martin Luther King, Jr. Boulevard, Room 418
Madison, Wisconsin 53703
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Web Page: <http://www.countyofdane.com>

AMY UTZIG
Human Resources Director

MEMORANDUM

DATE: April 25, 2017

TO: Carlos Pabellon
Director of Administration

FROM: Amy Utzig
Human Resources Director

RE: Recreation Therapy Aide (G14) reclassification to Recreation Therapist (SW16-18)
Badger Prairie Health Care Center, Position #1236

DEPARTMENT REQUEST

Lynn Green, Director of Human Services, has requested to change position #1236 from a Recreation Therapy Aide (G14) to a Recreation Therapist (SW16-18).

BACKGROUND AND REVIEW

Ms. Green states that MF has been promoted to one of the vacant Recreation Therapist positions effective April 2, 2017 vacating the last remaining Recreation Therapy Aide position. To further advance the BPHC RT Unit's restructuring, Lynn would like to pursue a reclassification of this Recreation Therapy Aide position to a Recreation Therapist. This is a continuation of what the department did with the last two vacancies in the RT Unit. Given the more detailed nursing home licensing requirements in the area of RT and the complex needs of the BPHCC residents, Ms. Green feels strongly that the RT staff needs a higher level of professional credentials to meet the regulations and needs. Along with this request, Ms. Green submitted a new position description with the duties that this position will now be performing.

RECOMMENDATION

The new position description Ms. Green submitted fits well within the classification specification of the Recreation Therapist. After completing a desk audit of this position and comparing it with other comparable positions in the County, I recommend that this position be reclassified to a Recreation Therapist.



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CARLOS PABELLON
Director of Administration

AMY UTZIG
Human Resources Director

April 25, 2017

To: Lynn Green, Human Services Director

From: Amy Utzig, MS, PHR, SHRM-CP, Human Resources Director

The request for the reclassification of the Recreation Therapy Aide (#1236) to Recreation Therapist (SW16-18) has been approved by Carlos Pabellon. This reclassification is effective as of April 30, 2017.

New titles: The reclassification of this position has created a new job classification.

Cc: Employee Relations
Renee Endres
Helen Anderson
Joe Kroll
Michelle Goldade
Kate Gravel (class specification provided to EG)
If moving position from one EG to another EG/Management, cc in the other EG Rep too