



ADMINISTRATIVE PROCEDURE

POSITION CONTROL

4101

Procedure No.

May 1, 2010

Date

- I. **PURPOSE:** To document the process for creating, reassigning, or changing the distribution, classification and/or number of authorized full-time equivalent (FTE) positions after the adoption of the annual budget. Distribution of allocated positions for the next fiscal year is governed by appropriate staffing formulas and program requirements established through the budget development process. However, if there are changes in the distribution, classification or number of positions between July 1 and June 30 after the budget was adopted, those changes are governed by these procedures.
- II. **BACKGROUND:** Prince Georges County Public School System employment is subject to many factors, including, budgetary, legislative, organizational and management requirements. The type and number of positions will vary to meet the conditions and evolving needs of the school system and a standard process for facilitating the necessary changes as needed. The positions within the school system account for a significant amount of all resources. The procedures herein are intended to provide an efficient process for the effective control of positions.
- III. **DEFINITIONS:** [Alphabetical order] The following definitions are pertinent to this administrative procedure.
 - A. **Account Manager** – A management level employee who is assigned financial decision-making responsibilities to include budget formulation, execution and control of funds.

Divisional Level Account Managers are Associate Superintendents (Chiefs and Executive Directors), Assistant Superintendents, Officers or other executive level employees who report directly to the Deputy Superintendent or Superintendent.

Department Level Account Managers are typically Directors, Officers or Principals that report directly to Divisional Level Account Managers.

Office and/or Program Level Account Managers are typically Supervisors who report directly to Department Level Account Managers.
 - B. **Create a position** – Create a new position that does not currently exist or increase the number of existing authorized positions.
 - C. **Downgrade a position** - Change a position to a lower grade when the task performed and the responsibilities are at a lower level than called for at the current grade.



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- D. **Eliminate a position** - Remove a position that already exists or decrease the number of existing authorized positions.
- E. **Organization** – Organizations are assigned to each unit of the School System and denote various levels within a hierarchy based on the School System’s organization chart. Organizations form the basis for security and access to information and provide roll-up or summary reporting for Human Resources and financial data.
- F. **Position** – A position is always defined by (1) a description of duties and responsibilities, (2) a period of employment, and (3) minimum qualifications. Positions are allocated in full-time equivalents (FTE), which permit allocations of less than a full-time position to meet varying workloads.
- G. **Position Name** – A position name is assigned to every full-time or part-time employee within an Organization. A position name is comprised of the following segments:
1. Position Number – A unique number assigned by Oracle when a new position is created.
 2. Position Title – The segment that organizes the job classifications for the school district and provides a standardized framework for organizing occupations into a manageable, understandable and coherent system for reporting purposes.
 3. Allotment Method – The segment that provides a method of identification as to how the position is budgeted or funded within the school district.
- Example of a position name: 12345.Classroom Teacher Formula
- H. **Position Classification Review Form** – A form used to obtain information needed to establish a new position or reclassify an existing position.
- I. **Position Control Hierarchy** – Used in Oracle to define the approval workflow for creating and updating positions. Positions maintained in this hierarchy are limited to Account Managers and Secretaries. The hierarchy is manually updated by the Office of Fiscal Compliance and Quality Assurance when there is an approved organization change resulting in the creation, transfer or deletion of existing Account Manager or Secretary positions.



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- J. **Position Transaction Request** - An automated process in Oracle used to create a new position, update an existing position or fill a vacancy for an approved vacant position.
- K. **Trade-off a position** - One or more positions are to be exchanged for one or more different positions of equivalent cost. The costs of the position affected by the trade-off must be approximately the same ($\pm 10\%$) unless other sources of funds are identified.
- L. **Transfer a position** - To transfer a position from one organization to another.
- M. **Upgrade a position** - This request changes a position to a higher grade when the tasks performed and the responsibilities of the position are at a level higher than specified for the present grade.
- IV. **PROCEDURES**: The following procedures apply to all actions in position transaction to create or modify a position.
- A. **Creating a new position.**
If the proposed action request is to **create a new position**, the subsequent steps must be followed:
1. Requestor/Account Manager accesses the Position Transaction Request module in Oracle and selects "Create a Position", enters all the relevant and required information and attaches a **Position Classification Review Form – New Position** to the request.
(Document is attached)
 2. The request is forwarded to the next approval level as defined in the position control hierarchy.
- Example of approval levels for a school initiated request:
- | | |
|---------------------|--------------------------|
| a. Requestor | Secretary or Principal |
| b. Approval Level 1 | Assistant Superintendent |
- Example of approval levels for a central office initiated request:
- | | |
|---------------------|--|
| a. Requestor | Secretary or Office/Program Supervisor |
| b. Approval Level 1 | Director |
| c. Approval Level 2 | Divisional Chief |



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3. If the request is approved, it is then forwarded to the Fiscal Compliance and Quality Assurance Office to be reviewed for accuracy. If the request is not grant related, it is forwarded directly to the Compensation and Classification Office to assure that the position is appropriately classified, assigned the correct job number, grade, step, union affiliation and supervisor. If the request is grant related, it is forwarded to the respective office (i.e. Title I, School Improvement, Head Start).
4. If the grant related request is approved, it is forwarded to the Compensation and Classification Office to assure that the position is appropriately classified, assigned the correct job number, grade, step, union affiliation and supervisor.
5. Compensation and Classification will then forward the request to Budget and Management Services for funding availability review.
6. The request is then forwarded to the Chief of Human Resources for approval/disapproval.
7. The request is then forwarded to the Chief Financial Officer for approval/disapproval. If approved, the position is applied, updated in Oracle and a system generated notification is forwarded to the requestor. If the position is disapproved, a system generated notification is forwarded to the requestor.

B. **Modifying or removing a position.**

If the proposed action request is **to trade-off, eliminate, change of hours/months/contract days, transfer a position, upgrade, or downgrade a position** the following steps must be followed:

1. Requestor/Account Manager accesses the Position Transaction Request module in Oracle and selects "Update Position", enters all the pertinent and required information. If the request is to upgrade or downgrade a position, attach a **Position Classification Review Form – Existing Position** to the request. (Document is attached)
2. Follow the same approval process as in "Create a Position", steps 2 thru 7.

Note: A position action may be subject to final approval by the Board of Education since allocation of associated funds is controlled in accordance with Board Policy 3130, Fiscal Responsible and Control-Annual Operating



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Budget, which states that the Superintendent must submit requests for proposed operating transfers that increase the overall number of authorized permanent positions classified as a grade 30 or above or that transfer funds within a category greater than or equal to \$100,000. The requestor will be notified of need for board action.

- V. **MONITORING**: The Position Control Management group, which consists of the Chief Human Resources Officer, the Chief of Information Technology, the Chief Financial Officer and related staff will meet weekly to review position control data.
- VI. **REPORTING**: The Position Control Management group will be responsible for the verification and production of monthly position control reports, including, but not limited to vacancy reporting.
- VII. **RELATED POLICIES AND PROCEDURES**: Board Policy 3130, Annual Operating Budget; Board Policy 4112, Appointment of Personnel; Administrative Procedure 4105, Fill a Vacancy; Administrative Procedure 4106, Request for a Central Office Reorganization.
- VIII. **MAINTENANCE AND UPDATE OF THESE PROCEDURES**: These procedures originate with the Chief Human Resources Officer and updates will be completed as needed.
- IX. **CANCELLATIONS AND SUPERSEDES**: This Administrative Procedure cancels and supersedes Administrative Procedure 4101, dated April 7, 1978 and any other prior writings and procedures on the subject of position control which may exist either formally or informally within the school system.
- X. **EFFECTIVE DATE**: May 1, 2010.

Approved by:

William R. Hite
Superintendent of Schools

Attachments: Attachment 1 HR Position Transaction Training Manual
Attachment 2 Position Control Module Fact Sheet
Attachment 3 Position Classification Review Form - New Position
Attachment 4 Position Classification Review Form - Existing Position

Distribution: Lists 1, 2, 3, 4, 5, 6, 10, and 11