Office of Human Resources
Department of Compensation & Performance Management

Position Management Guide
What is Position Management?

- Position management is the skillful use of people to accomplish the organization’s mission while conserving average grade levels and controlling personnel costs.
- It uses a systematic approach to determine the number of positions needed, the skills and knowledge required, and the grouping and assignment of duties and responsibilities to achieve the maximum efficiency and economy in the work force.
- It is a significant aspect of each supervisor and manager’s personnel management responsibility.

Simply put, position management is a term used to describe activities that revolve around establishing, modifying and inactivating positions.
Who Conducts Position Management?

- Each supervisor “conducts” position management every time he or she changes or establishes a position to perform some of the organization’s workload.

- Effective position management results from a conscious effort to organize and assign the work in the most efficient and economical manner.
Although position management is a continual process, each department should be audited periodically with an emphasis on overall position management improvement. These audits may be conducted in conjunction with the periodic classification surveys, but can be initiated by management at any time as deemed appropriate.
Why is Position Management Important?

- By using position management wisely, managers can have the privilege of adjusting their own positions and organization structures to meet local conditions. In addition, each supervisor can gain some direct advantages from practicing sound position management.

- Position management can be improved by applying some established guidelines, using common “symptoms” to locate and diagnose problems, and following tested methods to correct the problems found.
What are Common Position Management Problems?

A number of common symptoms of position management problems include:

- **Fragmentation**—a situation where a department is needlessly split into many small segments. This requires more supervisors, restricts the development of employees, interferes with communications, and causes over-specialization.

- **Layering**—when there are too many levels in the chain of command. This also interferes with communications and restricts the responsibility of lower-level supervisors and other employees.

- **Unnecessary positions**—may include assistants, extra supervisors, staff or support positions, “carryovers” from previous operating structures, or simply duplicates of other positions that are not needed.

- **Narrow span of control**—when a department uses more supervisors than necessary. It frequently occurs with fragmentation and (or) layering. It also limits initiative and responsibility and can be quite expensive.
What are Common Position Management Problems?

A number of common symptoms of position management problems include:

- **Job dilution**—lower level work performed by higher-classified employees. This is one of the most prevalent position management problems. It results in low employee morale, inefficiency, and higher costs.

- **Mismatched strength and workload**—occurs when the mission can be accomplished with fewer people than are assigned or when it requires more employees than is being allocated. Symptoms might include recurring and excessive overtime, backlogs, or high absenteeism.

- **Inaccurate position descriptions**—this can result in misclassifications, with the position and incumbent being over- or under-classified.

- **Interrupted or missing career ladders**—this exists where there is no clear path of progression from the lower to the higher grade levels within the department. This causes poor morale and may also result in staffing problems.

- **Workload and work force inconsistencies**—this occurs when long-term changes in workload or function are not followed by position or organizational changes; if some employees have frequent idle time while others are always behind; if some employees are frequently detailed to other positions in the organization; or when some employees regularly work outside their position descriptions.
Understanding Positions, Employees and Jobs
Using Position Management in PEOPLESOFT

- At HU, we use PeopleSoft HRMS to implement Position Management and track positions.
  - By tracking positions, we can keep a history of all positions at the university, regardless of whether they are filled or vacant.
  - In this way, organizational reporting relationships can be tracked independent of the employees in those positions.

- Employees can be moved in and out of positions while the focus remains on the position and corresponding information such as department, location, standard hours and funding.
  - When an employee leaves a job, the position becomes vacant and the information associated with the position is retained.
  - The record of position data in HU's PeopleSoft HRMS system serves as a basis for organizational planning, budgeting, and recruitment.
PeopleSoft Position Management Actions

Position Management actions include, but are not limited to:

- Establishing new positions (offline action)
  - Modifying Existing Vacant Positions
  - Modifying Occupied Positions

While these activities are the basis for Position Management, the events which trigger the need to perform these activities include, but are not limited to:

- Recruiting and Hiring for a Position
- Transferring an Employee Into a Position
- Reclassifying a Position
When Do Position Management Activities Begin?

Position Management activities should happen prior to an employee being placed into a position. This ensures that the employee is appropriately compensated, receives the correct benefits, and that the correct department is charged for the position. Position Management activities happen:

Before recruitment for the position begins

Before job postings

Before interviewing

Before hiring

Before changes in title or job happens

Before salary adjustments

Before promotions

Before transfers
When Do Position Management Activities Begin?

- Positions are established or updated
  - New Position Approval (offline)
  - Position Update ePAR

- Employees are hired
  - Hire or Rehire ePAR

- Employees are mapped to the position
  - Job Data Update
What are the Components of Position Management?

- A "Position" is a set of tasks developed to meet a department’s or organization’s needs in preparation for employment or hire of an individual. Position Management can track positions in the HCM system by assigning them "Position Numbers". A person holding a position is an "Incumbent".

- Using PeopleSoft for Position Management can tell us how many positions exist in a department or organization ("position headcount"), as well as how many are filled ("incumbents") and vacant.
What are the Components of Position Management?

Additional facts about position numbers:

- A position number is eight (8) digits, including possible leading zeros
- Automatically assigned to a new position
- Assigned in order as they are created
- Does not indicate the department or job code.
- Required to hire a person into a job
- Created and maintained by the compensation department
- Are searchable by managers for positions within their department
What are the Components of Position Management?

Position Management coordinates three (3) components:

1. **Position**—a Job independent of an Employee, e.g., Administrative Assistant
2. **Person**—an Employee, e.g., John Jones
3. **Job**—the union of Position and Person, e.g., John Jones in the Administrative Assistant position

Jobs are made up of Positions
Employees can be assigned to more than one position
Positions can be assigned to only one Employee
What are the Components of Position Management?

- A “Position” is a Job in the organization, independent of any particular employee.
- When an employee (incumbent) leaves a position, the position remains “vacant” to be filled again.
- Employees with the same position number (called a “multi-headcount position”) share the following attributes: Cost Center, Job Code, Department, Reports To, FTE, and Position Funding.
- An employee in a job has specific attributes, such as Salary, Appointment Type, and Position Funding.

A job cannot exist without a position and a person
A position can exist without a job or a person (a vacancy)
How is Position Data Different From Job Data?

- **Position Data**
  - Job Code
  - Position Budget
  - Standard Hours
  - Position Number
  - Headcount
  - Position FTE
  - Combo Code

- **Job Data**
  - Salary
  - Job FTE
  - Pay Group
  - Employee ID
  - Employee Class