

Flexible Staffing Guidelines

POLICY AND PROCEDURES

This document sets forth the policy and procedure for the operation of a classification and advancement system for administrative and professional staff at OSU Extension. This includes campus based staff (non-faculty), district, and county based staff (non-agent or specialist).

A. CATEGORIES AND TITLES

1. The classification system shall provide the opportunity for placement advancement through each of four administrative/professional staff categories. These reflect different job responsibility levels: Category I being the lowest and Category IV being the highest.
2. Attachment I (Professional Advancement) provides an overview.

B. POLICY

1. The Professional Advancement System shall apply to those positions that require substantial amounts of responsibility, creativity and training. The following position titles in Ohio State University's administrative/professional classification system will be used:

Program Assistant	Corresponds to Category I
Program Coordinator	Corresponds to Category II
Program Manager/Specialist	Corresponds to Category III
Program Director - Sr. A&P	Corresponds to Category IV
2. Each Category represents a distinct realm of duties, responsibilities and expertise. Classification of administrative/professional positions in the appropriate category is the responsibility of the unit leader in conjunction with OSU Extension administration and the University Office of Human Resources.

C. CHANGE OF JOB CATEGORY

1. A change in job categories will be initiated by the unit leader based on a change in job responsibilities as substantiated by the administrative/ professional staff member's job description.
 - a. Education: To be eligible for change in category the individual must meet the following minimum educational criteria (or equivalent experience): Category I - B.S.; Category II - B.S., M.S. preferred; Category III - M.S.; Category IV - M.S.
 - b. An advanced degree does not automatically call for a change in category.
2. Candidates must meet the minimum eligibility requirements outlined in Section E.
3. An application and review process will be followed before advancement to a new category occurs to determine candidate's eligibility.

D. MONETARY CONSIDERATIONS

1. University salary ranges for the different categories will be observed. Because of the great diversity of positions even within each administrative/professional staff category, often requiring vastly different types of training and skill, salary will be commensurate with job assignment and its responsibilities, training and experience related to the position and job performance.
2. There will be a salary increment associated with a change in job category.

E. ELIGIBILITY FOR RECLASSIFICATION

1. The Unit administrator identifies a change in job responsibilities.
2. The following general criteria for eligibility are intended to serve as minimal standards that can be documented. How the candidate meets these standards would be the primary emphasis of the consideration. Advancements in categories are not viewed as equal incremental steps; rather each requires an increasing level of ability, responsibility, proficiency and performance. Documentation is required of activities which support the criteria.
 - a. Reclassification Category I to Category II. The individual consistently fulfills the assigned duties in a highly satisfactory manner. Teaching proficiency is documented. The person pursues professional growth activities in order to enhance his/her performance. There is every indication that he/she will continue to grow professionally.
 - b. Reclassification Category II to Category III. The individual has a proven record of excellence in performance of duties. He/she has demonstrated initiative in both the organization and execution of these responsibilities and has continued to grow professionally by keeping current in his/her subject matter area, participating in career enhancement activities and has earned the respect of peers. Documentation of teaching excellence is provided. There is every indication that he/she will continue to grow professionally.
 - c. Reclassification Category III to Category IV. The individual has demonstrated exemplary ability and proficiency in his/her area of assigned responsibility. The person is recognized as being efficient, innovative and highly productive both by peers and by those with and for whom he/she works. Teaching excellence is documented. He/she is an established "professional" with the highest qualifications and has developed administrative capabilities.
3. Need for additional specific criteria. There is much diversity of positions and required expertise within the administrative/professional staff classification categories. Therefore it is usually appropriate that additional specific criteria be developed to provide more accurate measures of growth and performance in individual positions. The criteria developed for each position should reflect the job assignment and would be developed in conjunction with the administrative/professional staff member's immediate supervisor.

F. PROCESS FOR RECLASSIFICATION

1. Staff member should discuss the potential for reclassification following the annual evaluation with unit leader. The unit leader will determine if the staff member's position should be considered for reclassification. If the decision is affirmative, an application form for reclassification would be completed for the candidate.
2. The documentation of position responsibilities and duties, activities and supplementary information for the application form may be prepared by the candidate, candidate's supervisor, department head or any combination of the afore mentioned individuals. The administrative/professional staff member shall have opportunity to have input in the document used in the career advancement system.
3. The application form would be reviewed by the OSU Extension Human Resources and forwarded to the Chair of Extension. Following action, Human Resources will notify unit leader.

G. DOCUMENTATION FOR RECLASSIFICATION

The criteria for reclassification measures the candidate's performance in fulfilling his/her program or newly defined area of responsibility; professional interaction; and general value to the departmental unit and OSU Extension. This documentation provides evidence to substantiate the candidate's ability to qualify for a change in job category.

Due to the nature of the varied responsibilities of the administrative/professional staff, these criteria have been worded in the broad sense so as to pertain to all administrative/professional job assignments.

CANDIDATES DOCUMENTATION OF PERFORMANCE

- **Program development and implementation:** (1) principal accomplishments of the program handled by the candidate and documentation of productivity; (2) improvements made in the method of operation of the candidate's program; and (3) plans proposed by the candidate to further improve the program, etc....
- **Professional interaction:** (1) fosters departmental and/or interdepartmental working relationships; (2) accomplishments of the candidate in the role of supervisor if appropriate (3) contributes to the university, the college, the community or state.
- **Teaching:** Extension teaching includes program development, curriculum development, program facilitation, and/or delivery of programs or Extension education via a variety of formats including workshops, seminars, camps, mass media, personal communications and distance education. (1) The standardized group EEET will be required as well as (2) peer review using EEET. (3) Impact evaluations are also needed to assess outcomes.
- **Publications and communication (documentation of any of the following that are applicable to the assigned duties of the candidate):** (1) publications authored or co-authored (note those accepted in refereed journals); (2) papers, posters and presentation given at meetings; (3) mass communication efforts, such as magazine articles, newspaper features, brochures radio and television presentations, news releases, circulars, etc.; (4) in-house technical documents; (5) record maintenance; (6) editing;
- **Professional participation and recognition:** (1) membership in professional organizations (if applicable); (2) recent participation in activities of professional organizations (if applicable); (3) participation in local, state or national conferences and meetings; (4) offices and committee memberships held; etc....
- **Evidence of professional growth and development:** (1) participation in professional development programs such as workshops, seminars, mentoring programs, self instruction activities, short courses, or courses for credit, etc....
- **Awards or statements of recognition.**

ATTACHMENT I

PROFESSIONAL ADVANCEMENT SYSTEM			
Category I	Category II	Category III	Category IV
<p>With supervision, assists in coordinating activities & events; limited teaching</p>	<p>Participates in design, implementation & evaluation of programs, some teaching</p>	<p>Primary responsibility for design, implementation and evaluation of a major continuing program, project or seminar</p>	<p>Direct, coordinate and administer a variety of broad programs or series of programs or projects</p>
<p>BS Degree* preferred</p>	<p>BS required*</p>	<p>MS required*</p>	<p>MS required*, PhD desirable for some positions</p>
	<p>MS preferred Experience in program planning and administration</p>	<p>Experience in educational curriculum development and teaching or research Experience in program planning and administration</p>	<p>Considerable knowledge of education administration, program planning and administration</p>
<p>*Or equivalent experience</p>			

ATTACHMENT I

Characteristic Responsibilities - Criteria

Note: It must be recognized that each position has unique aspects and may in some cases overlap two categories. The listed responsibilities area examples, not all apply to any given position. A "best fit" approach will be used in determining assignment to Categories.

<p>Category I:</p> <ul style="list-style-type: none"> • Complete designated tasks related to preparation and teaching of educational meetings and inservice training • Coordinate volunteers for events and activities • Handle data collection and entry • Process and confirm registrations • Organize and coordinate logistics of events and activities • Arrange promotion or publicity for programs • Conduct literature research, compiling information and contributing to content development and writing of educational materials. • Does not supervise other staff • Disseminates materials and information • Assumes delegated responsibilities in program design and evaluation 	<p>Category III</p> <ul style="list-style-type: none"> • Plan and manage the preparation of articles, proposals, reports and educational materials • Teach in selected programs • Provide leadership for advisory groups, serves on advisory groups • Act as a liaison for the unit with faculty, Extension Agents and organizations • Prepare budget, monitor and approve expenditures for specific programs • Plan, supervise, and provide leadership for inservices in an assigned program • Plan and supervise scheduling of events • Serve as a contact or liaison for state, regional and national initiatives • Perform research, data collection and analysis • Develop new curriculum and educational programs in area of focus • Evaluate educational needs and make recommendations • Publicize and promote programs using a variety of methods • Conduct follow-up program evaluations • Functional and administrative supervision exercised over professional and support staff including interview, hire, train and evaluate • Develop grant proposals and administer grants in consultation with supervisor
<p>Category II</p> <ul style="list-style-type: none"> • Explore new areas of educational need, recommend new programs to meet those needs • Teach at inservices and educational meetings • Participate in arranging logistics or coordination of events • Prepare budgets and monitor expenses for events • Develop or select educational resource materials, other publications; oversee distribution • Act as a liaison with faculty, Extension Agents and organizations • Plan, supervise and schedule events in an assigned program • Compile information and draft grant proposals • Recruit, train, recognize and evaluate volunteers • Research, data collection and analysis following prescribed guidelines • Functional supervision of professional and support staff, including assisting in interviewing, hiring and training • Conduct evaluation of programming 	<p>Category IV</p> <ul style="list-style-type: none"> • Broad responsibility for a program emphasis area • Design, direct and administer specific programs including professional programs or community-based programs • Initiate or revise programs, including proposal development, development of courses, workshops and conferences • Recommend specific budgetary needs for programs and manage unit budget • Advise university, community groups and other professionals in developing appropriate programs • Establish and modify policies and procedures as they relate to specific programs • Oversee evaluation of the effectiveness of specific programs and recommend needed changes • Prepare reports or direct the preparation of reports or special studies • Develop plans to publicize and promote programs, monitor completion • Provide administrative and functional supervision over supporting supervisors and staff • Initiate grant proposals, negotiate and administer grants

Guidelines for Development of Position Description For Administrative/Professional Categories

Organize the position description using the format and order described below. Most position descriptions will be approximately 2-3 pages in length. Use the following guidelines:

Function Statement tells why and where the position exists. Core elements of the function statement would include the following:

1. Purpose of the position – why it exists
2. Scope/relative impact – this includes both level of independent judgment or how often you make decisions without checking with a supervisor or another individual and consequences or implications of actions you take or mistakes you might make. More complex and far-reaching consequences heighten the scope or impact of the position.
3. Contextual information – important facts about the unit (department) the position is attached to and expectations of the position related to criteria for performance. Identification of who the position reports to.
4. Supervisory responsibility for projects and/or people. Other human resources responsibilities.
5. Fiscal role/responsibility – level of responsibility, accountability and dollars managed

Summary of Duties is a brief overview of position duties and responsibilities. It should not repeat information in the function statement. It should describe key duties and clarify how the position fits the mission, vision and values of Extension and contributes to OSU Extension.

Description of Essential Duties – Categorize and list major tasks in order of importance. Duties are stated as action verbs/object statements that describe the action, behavior or outcome desired. These description statements focus on contributions and performance deemed critical to fulfilling the role and achieving the outcomes expected. While these **general** responsibilities may not change dramatically from year to year, priorities may change or responsibilities may grow over time. Include percentages to indicate the proportion of time spent on general responsibilities you have outlined thus far.

Specific short-term tasks, duties and assignments may vary from year to year. It is important for each staff person to keep the basic position description updated and include an attachment of specific duties and responsibilities negotiated with the supervisor and pertinent for the current year. These specific duties and responsibilities become the focus of the annual performance review, but over time could become part of the outcome criteria.

For more information on writing position descriptions, request a copy of *Tips for Writing Position Descriptions* (OSU Extension & Office of Human Resources, July, 2000).

Position Description Worksheet

I. **Name** _____

II. **Department or
Unit** _____

III. **Working Title** _____

IV. **Experience - Include previous related work experience and dates. Clearly
indicate years in current position.**

V. **Education - Degree(s), college and field of study**

VI. **Function Statement (Why the Position Exists)**

VII. **Summary of Duties (Overview of Duties)**

VIII. Description of Essential Duties (4 or 5 major categories describing the major tasks and how they are to be completed along with a percentage of time allocated to each)

IX. Specific Short Team Assignments (May vary from year to year)

Application – Cover Sheet
Reclassification Extension Professional Advancement System (EPAS)

Applicants: Follow directions in Guidelines for OSUE Extension Professional Advancement System. Submit this application during fall quarter to your unit head who will gather input and forward it to OSU Extension Human Resources. Be certain to attach: (1) an updated position description using the outline in the Guidelines; (2) a written narrative documenting performance in the seven designated areas: program development and implementation; professional interaction, teaching, publications and communication, professional participation and recognition, professional growth and development and awards. Including this cover sheet, your document should not exceed five pages.

Name:

Date:

OSU ID:

Department #:

Highest Degree Earned:

Department Name:

Date of Hire in Present Position:

Current Classification:

List split FTE for joint appointments or less than 100% in home department

Dept. #	Dept. Name	FTE
_____	_____	_____
_____	_____	_____

Recommendation:

___ Category I, Program Assistant

___ Category III, Program Manager

___ Category IV, Program Director

___ Category II, Program Coordinator

___ Category III, Program Specialist

		Do Not			
	Recommend	Recommend	Date	Signature	
Unit Head	_____	_____	_____	_____	
Department Chair	_____	_____	_____	_____	
Extension Assistant Director or District Director	_____	_____	_____	_____	
OSUE Human Resources	_____	_____	_____	_____	
OSUE Department Chair	_____	_____	_____	_____	

Comments: