



Planning Process for Vacancies and New Positions

Step-by-Step Process

1. Initiate Process: Manager performs a thorough analysis of resource needs and cites opportunities for efficiencies.
2. Justification by Manager and approval by Vice President.
3. **Choose either 3a or 3b**
 - 3a. Restructure, Conversion & New Position Request(s).
 - Manager reviews the proposed operational justification with Human Resources (HR Analyst).
 - HR determines job, FTE change, Administrative Procedure/Board Policy (AP/BP), Reclassification & Entitlement (AR&E & CRC) impact.
 - If applicable, review and scoring through AR&E/CRC for new/revised job description and recommended/adjusted salary.
 - HR will provide timeline and informational memo template and new/revised job description, if needed.
 - 3b. Fill a Vacant Position: **Note:** If manager is filing current position without changes – go directly to Step 8.
4. Cost & Funding Source Confirmed by Fiscal Services (Fiscal Analyst).
 1. Redirection of Funds – Use existing vacancies and/or discretionary budget.
 2. New Funding – Annual General Funding Program Review priorities or Restricted Funding.
 3. Budgetary Implications Form completed by Fiscal Analyst and signed by Manager.
5. Vice President to Review with Executive Leadership Team (ELT).

Note: *If the Position Request requires AR&E or CRC recommendation, follow Steps 6a-d*, 7-9, otherwise, go directly to Step 7-8.*

***Step 6e (Board of Trustee's approval) is only required for new classification.**

6. Manager reports Position Request with HR/Fiscal Services
 - a. AR&E/CRC:
 1. Feedback & Recommendation – HR Analyst updates Fiscal Analyst/Manager.
 - b. HR/Fiscal Confirmation:
 1. Fiscal Analyst reviews and finalizes costs and updates Budgetary Implications Form
 2. Manager finalizes informational memo with final budgetary implications.
 3. Manager sends informational memo to Director of HR and Risk Management & Controller for review/edit before being placed on the Planning and Budget agenda.
 - c. Planning & Budget - Informational and Feedback.
 - d. President's Council - Informational and Feedback.
 - e. Board of Trustees – Approval.
7. Planning and Budget.
8. Manager submits NeoGov Request with new Position Control Number.
9. HR begins recruitment.