Career Tracks

Training for Control Points – March 2017
Agenda

- Change is in the Air!
- Overview of Career Tracks
- Career Tracks Structure
- Job Standards
- --Break--
- Mapping Methodology
- Salary Grade Structure
- Tools and Resources
- Next Steps
Change is in the Air!
Exploring Change and Its Impact

- Replacing a 40+ year old classification framework is disruptive to the status quo
- Change = Ending something familiar and letting go
- Change brings about natural feelings and emotions, such as:
  - Anger
  - Confusion
  - Frustration
  - Distrust
  - Fear
  - Uncertainty
  - Loss
  - Disappointment
  - Ambivalence
Adapting to Change

- People adapt to change and uncertainty at different rates of speed.
- Understand that:
  - The emotional response is natural.
  - Perception of change is subjective.
  - **A strong vision of the “new normal” is an important bridge**

The Kubler-Ross Change Curve:

- **Shock**: Surprise or shock at the event.
- **Denial**: Disbelief; looking for evidence that it isn’t true.
- **Frustration**: Recognition that things are different; sometimes angry.
- **Depression**: Low mood; lacking in energy.
- **Experiment**: Initial engagement with the new situation.
- **Decision**: Learning how to work in the new situation; feeling more positive.
- **Integration**: Changes integrated; a renewed individual.
Implementing Slowly & Strategically

**What we heard from other campuses:**

- Frustration that the roll-out was rushed with little time to adjust to the change
- Employees did not understand the purpose/benefit of CT
- Employees did not understand the rationale for how their position was mapped
- Employees did not trust that the job mapping process was fair and equitable
- Disappointment that salary adjustments were not included
Overview of Career Tracks
What is Career Tracks?

*Career Tracks is a new classification framework that:*

- Defines jobs in a systematic classification structure
- Aligns jobs to respective labor markets by occupation
- Makes it easier for employees to identify and develop career paths
- Makes it easier to plan for career development

- Career Tracks only applies to Policy-Covered employees.
- Represented employees and SMG employees are not included.
Current Structure:

- 40+ years old
- Series Concepts outdated and duties not well defined
- Too many generic job titles

Career Tracks Provides:

- Payroll titles that reflect functional responsibility
- Job Standards that clearly define key responsibilities and KSAs (knowledge, skills & abilities) required at each level
- Consistent structure to be used across UC system
Current Structure:

- Strong internal focus on classification and pay
- No longer closely aligned with other UCs or labor market

Career Tracks:

- Shifts to blend of internal AND external focus for classification and pay
- Aligns professional and managerial job titles to the labor market
- Provides new market-based salary structure that will:
  - Enhance our ability to recruit and retain employees, and
  - Provide the data needed to develop a strategic and competitive approach to pay in the future

Alignment with Market
**Current Structure:**

- No information on possible career paths
- Difficulty in identifying occupational careers with so many generic titles

**Career Tracks Provides:**

- Job Standards that identify one or more career paths
- Job Standards that are occupationally specific, allowing employees to see exactly what is required at each level within a career path
- Consistent classification structure across UCs making it possible for employees to see how to advance their career at any UC location
Current Structure:

- Outdated Series Concepts do not define job duties well and cannot be used to write job descriptions or develop professional development plans

Career Tracks Provides:

- Clearly defined progression of job duties for use in creating professional development plans
- Clearly defined Job Standards that can be used to create job descriptions
What Changes and What Stays the Same?

- **No change to:**
  - Salary (up or down)
  - Job Duties or Functions
  - Working Title
  - Business Card Information

- **Will not affect:**
  - SMG (Senior Management Group) employees
  - Academic employees
  - Represented employees
  - Student employees

**What Changes?**

→ Employees will receive a new payroll title and salary grade

**Career Tracks is not a salary increase program**
Vision of the “New Normal”

7 Key Highlights:

1. Job Standards that clearly define skills, knowledge and abilities required at each level
2. Job Standards that can be used to write job descriptions
3. Better-defined career paths within job functions
4. Clearly defined progression of job duties for use in creating professional development plans

(continued)
Vision of the “New Normal”

**7 Key Highlights (cont):**

5. Consistent classification structure across UC system making it possible for employees to see how to advance their career at any UC location.

6. Job titles and grades that are aligned with other UCs and labor market (supports efforts to recruit and retain qualified employees).

7. New market-based salary structure that will provide the data needed to develop a strategic and competitive approach to pay in the future.
Career Tracks Structure
Defining jobs using consistent definitions of function, category and career level (rather than using generic titles such as “analyst” or “manager”) allows accurate pay comparisons with other employers in our labor market for comparable jobs.

<table>
<thead>
<tr>
<th>Job Family</th>
<th>A group of jobs in the same general occupation (ex: Finance)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Function</td>
<td>A more specific area within a family (ex: Payroll)</td>
</tr>
<tr>
<td>Job Category</td>
<td>Operational &amp; Technical</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Career Level</td>
<td>Level 1</td>
</tr>
<tr>
<td></td>
<td>Level 2</td>
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<tr>
<td></td>
<td>Level 3</td>
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</table>

To be used for entry-level trainees only

This is a place holder for represented jobs
Sample Job Family and Job Functions

- There are over 40 job families and over 300 job functions

### Human Resources

<table>
<thead>
<tr>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Human Resources</td>
</tr>
<tr>
<td>Benefits</td>
</tr>
<tr>
<td>Compensation</td>
</tr>
<tr>
<td>Employee Relations</td>
</tr>
<tr>
<td>Employment</td>
</tr>
<tr>
<td>Equal Employment Opportunity</td>
</tr>
<tr>
<td>HR Generalist</td>
</tr>
<tr>
<td>Labor Relations</td>
</tr>
</tbody>
</table>

### Information Technology

<table>
<thead>
<tr>
<th>Category</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applications Programming</td>
<td>Geographic Information Systems</td>
</tr>
<tr>
<td>AV IT Engineering</td>
<td>Information Systems</td>
</tr>
<tr>
<td>Bioinformatics</td>
<td>IT Architecture</td>
</tr>
<tr>
<td>Business Systems Analysts</td>
<td>IT Security</td>
</tr>
<tr>
<td>Business Technical Support</td>
<td>Production Control</td>
</tr>
<tr>
<td>Communications &amp; Network Technology</td>
<td>QA Release Management</td>
</tr>
<tr>
<td>Computational &amp; Data Science Research</td>
<td>Systems &amp; Infrastructure Admin</td>
</tr>
<tr>
<td>Data Systems Management</td>
<td>Systems Integration</td>
</tr>
<tr>
<td>Database Administration</td>
<td>Technical Project Management</td>
</tr>
<tr>
<td>Educational Technology</td>
<td>User Experience Design</td>
</tr>
</tbody>
</table>

Hybrid Function
## Job Titles Before and After

<table>
<thead>
<tr>
<th>...Before... (Generic)</th>
<th>&lt;-------- After (Functionally Specific) --------&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Analyst</strong></td>
<td></td>
</tr>
<tr>
<td>Administrative Officer</td>
<td>Fundraiser</td>
</tr>
<tr>
<td>Employment Rep</td>
<td>Marketing Specialist</td>
</tr>
<tr>
<td>Events Specialist</td>
<td>Payroll Analyst</td>
</tr>
<tr>
<td>Financial Analyst</td>
<td>Project/Policy Analyst</td>
</tr>
<tr>
<td>Financial Services Analyst</td>
<td>Research Administrator</td>
</tr>
<tr>
<td><strong>Computer and Network Technologist (CNT)</strong></td>
<td></td>
</tr>
<tr>
<td>Applications Programmer</td>
<td>Database Administrator</td>
</tr>
<tr>
<td>Business and Tech Support Analyst</td>
<td>Information Systems Analyst</td>
</tr>
<tr>
<td>Data Systems Analyst</td>
<td>System Administrator</td>
</tr>
<tr>
<td><strong>Student Affairs Officer (SAO)</strong></td>
<td></td>
</tr>
<tr>
<td>Admissions/Recruitment Specialist</td>
<td>Registrar Specialist</td>
</tr>
<tr>
<td>Career Services Specialist</td>
<td>Student Academic Advisor</td>
</tr>
<tr>
<td>Financial Aid Officer</td>
<td>Student Services Advisor</td>
</tr>
</tbody>
</table>
Job Standards
## Career Tracks – Sample Job Standard

<table>
<thead>
<tr>
<th>Job Family</th>
<th>Finance</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Category</td>
<td>Professional</td>
<td></td>
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</tbody>
</table>

**Job Summary**: Involves the processing and servicing of a variety of operational, personnel, and financial transactions and services. Includes cashiering, payroll, accounts receivable, accounts payable, collections, data collection and data entry, analysis, review and control, customer servicing, and reporting.

### General Scope
- Entry-level professional with limited or no prior experience; learns to use professional concepts to resolve problems of limited scope and complexity; works on developmental assignments that are initially routine in nature, requiring limited judgment and decision making.

- Professional who applies acquired job skills, policies, and procedures to complete substantive assignments/projects/tasks of moderate scope and complexity; exercises judgment within defined guidelines and practices to determine appropriate action.

- Experienced professional who knows how to apply theory and put it into practice with in-depth understanding of the professional field; independently performs the full range of responsibilities within the function; possesses broad job knowledge; analyzes problems/issues of diverse scope and determines solutions.

- Technical leader with a high degree of knowledge in the overall field and recognized expertise in specific areas; problem-solving frequently requires analysis of unique issues/problems without precedent and/or structure. May manage programs that include formulating strategies and administering policies, processes, and resources; functions with a high degree of autonomy.

- Recognized organization-wide expert. Has significant impact and influence on organizational policy and program development. Regularly leads projects of critical importance to the organization; these projects carry substantial consequences of success or failure. May direct programs with organization-wide impact that include formulating strategies and administering policies, processes, and resources. Significant barriers to entry exist at this level.

### Description of breadth and level
- **Consistent across all job functions**
  - Unique for each job function

<table>
<thead>
<tr>
<th>Job Level</th>
<th>Entry</th>
<th>Intermediate</th>
<th>Experienced</th>
<th>Advanced</th>
<th>Expert</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Code</td>
<td>4626</td>
<td>4627</td>
<td>4628</td>
<td>4629</td>
<td>5923</td>
</tr>
<tr>
<td>Tracking Code</td>
<td>A0196</td>
<td>A0197</td>
<td>A0198</td>
<td>A0195</td>
<td>A0189</td>
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<tr>
<td>Program</td>
<td>PSS</td>
<td>PSS</td>
<td>PSS</td>
<td>MSP</td>
<td>MSP</td>
</tr>
<tr>
<td>FLSA</td>
<td>Non-Exempt</td>
<td>Non-Exempt</td>
<td>Exempt</td>
<td>Exempt</td>
<td>Exempt</td>
</tr>
</tbody>
</table>

- **Custom Scope**

- Learns to apply professional financial services functions (Accounting, Accounts Payable, Accounts Receivable, Cashiering and Collections). Applies organizational policies and procedures to resolve routine issues and customer inquiries. Works on problems of limited scope. Follows standard practices and procedures in analyzing situations or data from which answers can be readily obtained. Receives predetermined work assignments that are subject to a moderate level of control and review. Has internal and some external contacts.

- Uses professional financial services concepts. Applies organization policies and procedures to resolve a variety of moderately complicated issues. Works on financial services problems of moderate scope where analysis of situations or data requires a review of a variety of factors.

- Uses skills as a seasoned, experienced financial services professional with a full understanding of industry practices and organizational policies and procedures. Resolves a wide range of issues. Demonstrates good judgment in selecting methods and techniques for obtaining solutions.

- Uses advanced financial services and accounting concepts and organizational objectives to resolve highly complex issues. Regularly works on highly complex issues where analysis of situations or data requires an in-depth evaluation of variable factors. Exercises judgment in selecting methods, techniques and evaluation criteria for obtaining results.

- Having wide-ranging experience, uses professional concepts and organizational objectives to resolve the most complex issues with Campus-wide impact. Works on most complex issues with little or no campus precedent where analysis of situations or data requires an in-depth evaluation of variable factors. Exercises judgment in selecting methods, techniques and evaluation criteria for obtaining results. Internal and external contacts often pertain to campus plans and objectives. Is considered a subject matter expert on campus and often recognized as an expert externally in the industry. May provide guidance to other personnel or supervise professional or clerical staff. May serve as work lead. May serve as...
<table>
<thead>
<tr>
<th>Job Family</th>
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<tr>
<td>Job Function</td>
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</thead>
<tbody>
<tr>
<td><strong>Key Req 01</strong></td>
<td>Learns to perform basic preparation and summarization of information and reports relative to new services, regulatory compliance issues and/or vendor selection and support activities. Applies professional financial and accounting concepts to independently perform analyses of moderately complex financial services such as researching discrepancies and tax implications and compliance with external regulations and internal policies.</td>
<td>Applies financial services concepts i.e., accounting, accounts receivable, accounts payable, collections, data collection and data entry, analysis, review and control, customer service, and reporting.</td>
<td>Applies advanced financial services and accounting concepts to perform highly complex technical analyses.</td>
<td>Performs the most complex and advanced analysis techniques to resolve highly complex issues with broad organization-wide impact in creative and cost effective ways.</td>
<td>subject matter expert or project manager.</td>
</tr>
</tbody>
</table>

| **Key Req 02** | Learns to reconcile, research and resolve discrepancies in financial data. Under general supervision, researches and gathers information from a variety of sources; prepares and summarizes information and reports relative to new services, regulatory compliance issues and/or vendor selection and support activities. Provides analyses for complex summaries and reports relative to a diverse range of topics to include new financial procedures and/or services, changes in legal regulations, tax implications, etc. | Advanced understanding of industry practices and organizational policies and procedures to resolve highly complex or difficult assignments. | Directs the initiation of and/or design summary reports and background materials regarding a wide variety of internal and external policies and regulations to address a range of issues such as regulatory compliance, tax implications, recovery of cash, risk management, and the organized implementation of new services, procedures and/or policies. | Bachelor’s degree in related area and/or equivalent experience/training. Bachelor’s degree in related area and/or equivalent experience/training. Bachelor’s degree in related area and/or equivalent experience/training. Bachelor’s degree in related area and/or equivalent experience/training. Bachelor’s degree in related area and/or equivalent experience/training. |

| Education 1 | Bachelor’s degree in related area and/or equivalent experience/training. | Bachelor’s degree in related area and/or equivalent experience/training. | Bachelor’s degree in related area and/or equivalent experience/training. | Bachelor’s degree in related area and/or equivalent experience/training. | Bachelor’s degree in related area and/or equivalent experience/training. |
| Education 2 | | | | | |
| Education 3 | | | | | |
| Education 4 | | | | | |

**KSA 01** Must have basic knowledge of financial or accounting concepts, processes and procedures. Working knowledge of financial processes, policies and procedures. Thorough knowledge of financial processes, policies and procedures. Advanced knowledge of financial or accounting concepts, policies and procedures, as well as related accounting and regulatory compliance requirements. Expert knowledge of financial processes, policies and procedures, as well as related accounting and regulatory compliance requirements. **KSA 02** Must be proficient in use of Microsoft Office and common desktop/web applications. Knowledge of financial data management and reporting systems. Knowledge of financial data management and reporting systems. Knowledge of organization and systems-wide financial processes and procedures. Knowledge of organization and systems-wide financial processes and procedures. **KSA 03** Interpersonal skills; service orientation; active listening; critical thinking; attention to detail, ability to multi-task in a high volume environment, effective verbal and written communication skills, organizational skills. Must be proficient in use of Microsoft Office and common desktop/web applications. Must be proficient in use of Microsoft Office and common desktop/web applications. Must be proficient in use of Microsoft Office and common desktop/web applications. Must have advanced skills using Microsoft Office and common desktop/web applications. Must have advanced skills using Microsoft Office and common desktop/web applications. **Career Path 1** Financial Services 01 Financial Services 02 Financial Services 03 Financial Services 04 Financial Services 05 Finance > Financial Services > Supervisory and Management
Break
Mapping Methodology
Mapping Methodology - Basics

Mapping is based on:

- **Most recent job description**
  - Current duties not reflected on JD not considered
  - Future duties not considered
  - Current org charts not considered if reporting relationships not reflected in JD

- **Majority of duties (50% or more)**
  - Both function and level are based on majority of duties
  - If position is a “hybrid” – see “Mapping Hybrids”

**Goal** = Finding the best overall fit to job family and function
Mapping Methodology – Scope

Scope/breadth of responsibility

• Extent or range of responsibilities, scope of impact, and span of influence
• Size and Scope of organization(s) or unit(s) managed
  ➢ Number and scope of direct reports
  ➢ Impact and influence on unit, department, division, and/or campus
• Generic Scope = describes the industry standard/general scope of responsibility and is the same across all standards for every family and function
• Custom Scope = describes the scope of responsibility relative to the specific work performed under a given function and is specific for each level
Mapping Methodology – Generic Scope

- Generic Scope is the same at each level, within each job category, and within each job function

- Example → Generic Scope for Student Life and Development Manager 1 = Generic Scope for Administrative Manager 1

<table>
<thead>
<tr>
<th>Manager 1</th>
<th>Manager 2</th>
<th>Manager 3</th>
<th>Manager 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spends the majority of time (50% or more) achieving organizational objectives through the coordinated achievements of subordinate staff. Establishes departmental goals and objectives, functions with autonomy. Manages the accountability and stewardship of human, financial, and often physical resources in compliance with departmental and organizational goals and objectives. Ensures subordinate supervisors and professionals adhere to defined internal controls. Manages systems and procedures to protect departmental assets.</td>
<td>Oversees through subordinate managers a large department or multiple smaller units, OR manages a highly specialized technical function / team. Has significant responsibility to achieve broadly stated goals through subordinate managers. Determines objectives, directs programs, develops strategies and policies, manages human, financial, and physical resources, and functions with a high degree of autonomy. Proactively assesses risk to establish systems and procedures to protect organizational assets. Determines strategies for a program with organization-wide impact.</td>
<td>Oversees through subordinate managers one or more large, complex departments or business units with multiple functional disciplines / occupations, OR manages a program, regardless of size, that has critical impact upon the organization as a whole, such as most or all of a campus, medical center, UCOP or the UC System. Has significant responsibility for formulating and administering policies and programs, manages significant human, financial, and physical resources, and functions with a very high degree of autonomy. Oversees through subordinate managers the accountability and stewardship of department resources and the development of systems and procedures to protect organizational assets.</td>
<td>Directs through subordinate managers multiple large and complex critical programs impacting broad constituencies across major portions of the organization. Identifies objectives, manages very significant human, financial, and physical resources, and functions with an extremely high degree of autonomy. Accountable for formulating and administering policies and programs for major functions. Operational or program results can affect overall organization-wide performance and reputation. Directs through subordinate managers the development of strategic goals and objectives to achieve accountability and stewardship of university resources in a manner consistent with systemwide objectives and initiatives.</td>
</tr>
</tbody>
</table>

*Duties of position must meet the Generic Scope definition to be at that level.*
Mapping Methodology – Custom Scope

- Custom Scope is UNIQUE to each level, within each job category, and within each job function
- Example below is from the Student Life and Development function
- Custom Scope addresses scope differences more specifically and functionally

<table>
<thead>
<tr>
<th>Manager 1</th>
<th>Manager 2</th>
<th>Manager 3</th>
<th>Manager 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manages a discrete Student Affairs or Student Life &amp; Development function and/or program. Formulates policies and procedures for the function. Develops the long and short term organizational goals and strategic plans of the organization. Directs the program internally and externally. Manages the operating budget and human resources of the program.</td>
<td>Manages a complex Student Affairs or Student Life &amp; Development function and/or program or several smaller programs. Develops the long term organizational goals and strategic plans of the organization. Directs subordinate supervisors and/or managers. Has broad program responsibility. Oversees the program analysis and evaluation. Manages the budget and human resources. Represents the organization with external organizations. Evaluated on overall program results and effectiveness.</td>
<td>Directs comprehensive student life and development programs through subordinate managers for large and highly visible programs. Participates with other higher level managers to establish strategic plans and objectives affecting student life and development organization-wide. Through subordinate managers directs student life and development professionals functioning in a variety of specializations. Errors of serious decisions will have a serious impact on the overall success of division and/or the organization.</td>
<td>Manages through subordinate managers several large, distinct, and comprehensive student life and development departments, each with organization-wide impact. Exercises leadership within and external to the organization. Has significant responsibility for and is expected to lead organization-wide initiatives, decisions, and policy-matters involving students throughout the organization. Programs affect a number of major aspects of the non-academic life of the University, such as residential life, public service, leadership development, student conduct, student organization advising, and/or student health.</td>
</tr>
</tbody>
</table>

Duties of position must meet both the Generic Scope and Custom Scope definitions to be at that level.
Mapping Methodology - Supervisors

Supervision of employees

- Supervision of 2.0 career FTE or more – AND -
- Majority (50%+) of time in position is spent on supervisory related duties
- Supervisory designation is also used when:
  - Position duties are primarily related to bargaining unit work, but some percentage of time is spent supervising other bargaining unit employees (e.g. AA3 Supv)
  - If position duties are primarily professional in nature and supervision equals less than 50% time, map to a professional level title

Q: Can you still supervise without a supervisor title? YES!
Supervisor Mapping Decision Tree

Using the Supervisory Title Codes in Career Tracks

Does this position supervise 2.0 FTE or greater, as defined by HEERA?

No

This position should not be mapped to a Supervisory Title Code.

Yes

Does this position perform at least 3 of the 6 Supervisory functions listed under HEERA?

No

This position should not be mapped to a Supervisory Title Code.

Yes

Is the work performed by this position primarily:

Operational or Technical (Bargaining Unit Work)

Operational/Technical positions should be mapped to a Supervisory title code when HEERA criteria are met, regardless of the time spent on supervision.

Professional (Non-Bargaining Unit Work)

Professional positions should be mapped to a Supervisory Title Code.

Does the Job Description designate the majority of time spent on supervisory duties?

No

This position should be mapped to a Professional Title Code.

Yes

This position should be mapped to a Supervisory Title Code.

Use of the Supervisory Title Code in Career Tracks differs from the current practice at UCSB. For Professional positions, supervision must constitute the majority of time to be classified into a Supervisory Title Code.

HEERA:
To Qualify for the Supervisory designation, the baseline requirement is supervision of at least 2 Career employees totaling 2.0 FTE or more.

AND must perform at least 3 of the 6 listed supervisory functions:

1. Hiring
2. Performance Evaluations
3. Reclassification/Promotion
4. Discipline/Discharge
5. Complaint/Grievance Resolution
6. Work Assignments

Positions mapped to a Professional title code can still have full supervisory responsibilities, and can be identified by including “Supervisor” in the working title.
Management Responsibilities

- A managerial title is only assigned when supervision and management is the primary function and the manager spends the majority (50% or more) of his/her time on supervisory and management related duties.

- If more than 50% of the position is focused on performing one or more professional functions and not on supervision and management, then the position should be mapped to a professional level title, based on the majority of professional level work performed.
Mapping Methodology - Managers

Management Responsibilities (continued)

- Managers spend the majority of time (50% or more) achieving organizational objectives through the coordinated achievements of subordinate staff. They perform managerial functions such as:
  - Assume accountability for decisions made by subordinates
  - Manage employee performance (e.g. guides, coaches and disciplines staff)
  - Manages workflow, operations, apportioning the work
  - Establish department goals and objectives (and manage department progress toward goals)
  - Plan and oversee the budget
  - Monitor or implement legal or policy compliance measures
  - Perform strategic planning for department/organization
In most cases, managers achieve objectives primarily through the coordinated efforts of staff who directly report to them. However, there may be a small number of functional managers where the incumbents may oversee professional staff who do not report to them, yet have significant accountability, influence, and impact over professionals within subordinate organizations in the same specific functional area.

A functional manager must meet all the following criteria:

- Has significant accountability for decisions made by others (who do not directly report to the incumbent) in the same functional area (e.g. Finance or Human Resources)
- Provides guidance to professional staff in the same functional area who in turn advise managers and employees
- Monitors or implements legal or policy compliance measures in subordinate organizations
- Provides guidance and expertise in developing techniques and processes in subordinate organizations
Mapping Methodology – Hybrid Jobs

**Mapping Hybrid Jobs:**

- Many employees at UC wear multiple hats
- Some have a variety of functions that reside within one job family
  - Look for Hybrid title in job function (e.g. Info Syst Analyst, HR Generalist)
- Some have a variety of functions that cross over different job families. When in doubt, match a hybrid position to a function based on the duties that...
  - Constitute at least 50% of the job
  - Constitute the greatest overall percentage of the job
  - Constitute the primary purpose of the position
  - Would be emphasized for recruiting when a vacancy arises
Mapping Methodology – Exemption Status

**FLSA Exemption Status (exempt vs. non-exempt):**

- FLSA exemption status is pre-determined by job title and associated job duties
- Positions mapped to **Exempt** job titles must perform exempt level duties, such as:
  - Customarily and regularly exercises independent judgment and discretion more than 50% of the time on matters which affect the business as a whole or a significant part of it
  - Directly and fully supervise 2.0 career FTE or more and have the authority to make employment and disciplinary decisions
  - Authority to formulate or interpret organization policies
  - Authority to commit the employer in matters which have significant financial impact
  - Authority to deviate from organization policy without prior approval

*Tip: If you’re on the fence about a level and it’s between an exempt and non-exempt classification, look to see if the duties meet the exemption criteria above.*
Salary Grade Structure
Career Tracks Grade Structure

- Consistent grade and midpoint structure established across all UC campuses
- MSP titles range anywhere from grades 21 to 30
- PSS titles range anywhere from grades 15 to 24
- Grades differ by level according to function
- No correlation to current grade structure

<table>
<thead>
<tr>
<th>New Grade Structure</th>
<th>Mgr 1 Grade</th>
<th>Mgr 2 Grade</th>
<th>Mgr 3 Grade</th>
<th>Mgr 4 Grade</th>
</tr>
</thead>
<tbody>
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Grades are assigned to payroll titles based on average market value of function.

Grade midpoints based on average market medians.

10% Geographic differential applied to midpoint.

Range minimums and maximums determined by each campus.

Not yet finalized at UCSB.
Grade Structure and Cost of Labor

- Labor Market data consists of information from public, private and higher education survey sources.
- Geographic adjustments to midpoints made for each campus.
  - Geographic % differentials based on cost of labor for local region, as determined by independent research company, Economic Research Institute.
  - Draft salary grade structure for UCSB reflects a 10% geographic differential.

- **Cost of Labor** reflects what a particular geographic market offers as compensation for a specific type of work.

- **Cost of Living** reflects the cost of goods utilized by a typical consumer, including items such as housing, groceries and transportation.

  Salaries are driven by Cost of Labor and reflect how much it costs to employ people in specific roles.
Tools and Resources
Login using Employee Net ID and Password

SharePoint instructions on web site
Job Standards – *SharePoint Web Site*

User instructions

Link on HR web site – or – https://share.pmo.ucsb.edu/hr
Job Standards – *SharePoint Web Site* (cont.)

Job Family folders contain Job Standards by Job Function

Job Standards by Job Function
One for each Job Category - Professional, Supervisor, Manager
The full list of all Career Tracks mapping for your areas has been uploaded to a UCSB secure Box.com folder

Please look for the email that invites you to see what’s in the Box folder

Log in using your Net ID and Password

  This step may require some extra site navigation if you’ve never used box.com before

Click on the Excel Mapping Spreadsheet

Select “Open in Excel Online” or “Open in Excel on Desktop”

If you open in Excel online, you will be able to make notes, comments, etc. in real time, along with other authorized users, and those changes will automatically save to the Box folder

  The downside to Excel online is that it doesn’t function exactly like Excel on your desktop

If you open in Excel on your desktop, you’ll have to save it separately and re-load it to the Box later if you want to share anything you’ve added to the spreadsheet with HR

Questions/Problems? Please contact Mara Morrison at x4459
Mapping Review Tips

Reminder 1: all preliminary mapping is based on most recent JD on file in OACIS
Reminder 2: Focus primarily on management level positions

- Does the Job Family and Function reflect the majority of duties performed?
  - If the position has a mix of functions, a Hybrid function may have been selected or a majority function.
- Does the Job Category (Professional, Supervisor or Manager) reflect the majority of duties performed?
  - Hint: Supervisor and Manager titles ONLY if majority of time spent supervising/managing
- Has the Job Level been appropriately matched to the breadth and scope of position as described in the Generic Scope and Custom Scope definitions?
  - Position must meet scope definitions at each level
- If the preliminary mapping doesn’t appear to match your perception of position responsibilities, reference the written JD to see if it’s current.
Notes on Career Tracks Systemwide

- Initial framework and structure developed by UC Berkeley and implemented in 2009 ~ called “Career Compass”
- 2011 – present: Framework and structure modified to fit all UC campuses
- 2015: UC President, Janet Napolitano, strongly supports and urges Career Tracks implementation system-wide
- As of 2017: Most campuses are done or nearly done implementing
  - UCLA and UCI not yet started with mapping
  - UCSB fully mapped and ready to implement
Next Steps
Next Steps...

Focusing primarily on management level positions:

- Familiarize yourself with the variety of Job Functions in your organization
- Familiarize yourself with the tools and resources
- Review the mapping methodologies and mapping review tips
- Begin reviewing the mapping for all management level positions (managers 1 – 4)
- Refer to Pre-meeting guidelines for:
  - Rules on sharing mapping
  - Expectations of Control Points
- Schedule follow-up meetings with HR to discuss your questions/observations/concerns
- Share high level impressions of Career Tracks & mapping with senior leadership
Contacts – Compensation Unit

- Kathy Moore, Compensation Manager, x7137
- Amy Arnold, Senior Human Resources Analyst, x4068
- Tamara Berton, Senior Compensation Analyst, x4661
- Linda Broen, Compensation Analyst, x4832
- Angie Mignone, Senior Compensation Analyst, x7664
- Mara Morrison, Human Resources Analyst, x4459

- Cynthia Señeriz, Human Resources Director, x8137

Thank you!