



University
of Idaho

A NEW SYSTEM FOR POSITION DESCRIPTIONS

**UNIT ADMINISTRATOR AND AAC
TRAINING**

SEPTEMBER 27, 2018



INTRODUCTIONS

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I Jennifer Cossel, Faculty Operations Manager



OUTLINE FOR TODAY

- I Background: Why are we doing this?
- I A suggested process for departments
- I People Admin demonstration and workflow
- I Does this change annual evaluations?
- I Resources
- I Questions?



WHY ARE WE DOING THIS?

- I Faculty senate approved a new position description policy in spring 2018.
- I Changes were approved by the UI faculty on April 25.
- I Faculty governance!

3050

POSITION DESCRIPTIONS

PREAMBLE: This section describes the creation and use of position descriptions that define responsibilities for faculty. This section was original to the 1979 Handbook; it has been editorially revised at intervals. In July 1998 the year covered by a position description was changed from an academic year to a calendar year. In July 2001 section B underwent some clarifying changes while the form itself underwent extensive revisions. In July 2007 the form underwent substantial revisions to address enforcement and accountability issues in the UI promotion and tenure process as well as to align the form with the Strategic Action Plan. In 2009 the form was revised to better integrate faculty interdisciplinary activities (including ensuring communication among all parties and eliminating the need to obtain multiple signatures) and FSH 3140 was incorporated into this policy. In January 2015 assessment language was added to the form. In 2016 a pilot form was introduced that reduced the amount of detail requested from faculty, streamlining the process and ratified in January 2017 with minor edits. Further information may be obtained from the Provost's Office (208-885-6448). [rev. 7-98, 7-01, 7-07, 7-09, 1-15, 1-17ed. 12-06]

A. GENERAL. The position description establishes the expectations for each faculty member's specific responsibilities in the ~~four~~ major responsibility areas identified in FSH 1565 C, Teaching and Advising, Scholarship and Creative Activities, Outreach and Extension, and University Service and Leadership. Expectations must be consistent with the unit(s) context statement. Faculty should ensure that the description fully encompasses the range of their expected activities ~~be careful when preparing their position description to ensure they describe their goals and expectations in all responsibility areas.~~ The position description serves as a reference for a faculty member's a variety of important functions; in particular, it constitutes the essential frame of reference in annual performance evaluation ~~of faculty members~~ [see 3320], and consideration of faculty members is one component of the independent process for tenure and promotion [see 3520 and 3560]. [*rev. 7-98, 1-17, ed. 7-00, 7-02, 7-09, 1-12*]

~~B. PERFORMANCE EXPECTATIONS.~~ ~~Expectations designated for individual faculty members to achieve tenure or promotion in rank or satisfactory performance evaluation must be compatible with the criteria of the department or other unit concerned. Each faculty member is to be advised of these expectations in writing by the departmental or unit administrator at the time of appointment. [7-09—original text from 3140 A]~~

~~B-1.~~ ~~Expectations are specified in the current faculty position description and are the basis for the annual performance evaluation. Expectations must not be greater than those that can be reasonably supported in the department or unit by providing sufficient time and resources. [rev. 7-09—partial text from 3140 B-1, 4 & 5]~~

~~B-2.~~ ~~Except by written agreement between the faculty member and the appropriate administrator, expectations for individual faculty members are in effect for a period of one calendar year. [7-09—original text from 3140 B-2]~~

BC. PROCEDURE.

~~CB-1. The calendar year A position description shall be provided to each faculty member by the unit administrator within a reasonable period of time after the faculty member begins employment. The faculty member, and the unit administrator(s), and/or center director, must approve the position description. is recorded on the form appended to this section with a due date established by the provost. [rev. 7-98, 1-08, 7-09, ed. 7-01]~~

~~C-2. The form should be filled out in collaboration with the unit administrator. Faculty members involved in interdisciplinary activities should check the box on the position description form and attach a narrative explaining their activities and listing units and members involved. For faculty involved in interdisciplinary activities or with centers, the unit administrator is to solicit comments regarding the position description and discuss it with all interdisciplinary/center administrator(s) listed on the faculty member's narrative attached to the form. The form is then to be signed by the faculty member, approved by the unit administrator, and dean, and sent to the Provost's Office. [rev. 7-01, 7-02, 1-08, 7-09]~~

~~BC-32. The position description shall remain in effect unless revised to reflect substantial changes in expectations. Such a change may include the assumption of administrative responsibilities, a change in teaching~~

~~load, an increase in research responsibilities, leave or sabbatical, etc. The faculty member and the unit administrator(s), and/or center director, must approve the revised position description. Any change in duties or responsibilities that represents a significant departure from the position description is permitted only with the written consent of the faculty member and administrator involved. A revised position description should be filed in this event. [7-09 original text from 3140 B-3]~~

~~C-4. When the personnel activity report form (PAR) (see APM 45.09) is completed, the unit administrator should compare the data obtained for each faculty member with the corresponding position description. Perfect agreement between the position description and the record of actual performance is not necessarily expected, but it is desirable that any discrepancy between them be as small as is feasible. [ed. 7-01, 7-09]~~

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A. GENERAL. The position description establishes the expectations for each faculty member in the major responsibility areas identified in FSH 1565 C, Teaching and Advising, Scholarship and Creative Activities, Outreach and Extension, and University Service and Leadership. Expectations must be consistent with the unit(s) context statement. Faculty should ensure that the description fully encompasses the range of their expected activities. The position description serves as a reference for a faculty member's annual performance evaluation [see 3320], and is one component of the independent process for tenure and promotion [see 3520 and 3560]. *[rev. 7-98, 1-17, ed. 7-00, 7-02, 7-09, 1-12]*

B. PROCEDURE.

B-1. A position description shall be provided to each faculty member by the unit administrator within a reasonable period of time after the faculty member begins employment. The faculty member, and the unit administrator(s), and/or center director, must approve the position description. *[rev. 7-98, 1-08, 7-09, ed. 7-01]*

B-2. The position description shall remain in effect unless revised to reflect substantial changes in expectations. Such a change may include the assumption of administrative responsibilities, a change in teaching load, an increase in research responsibilities, leave or sabbatical, etc. The faculty member and the unit administrator(s), and/or center director, must approve the revised position description.



WHAT ARE THE GOALS OF THE POLICY?

- I To reduce workload by eliminating the annual position description process.
- I Create a system where new PDs are only created when there are “substantial changes”.
- I Transition to an electronic system for creating and storing faculty position descriptions.
- I Create PDs that are focused on the position, not the planned activities of a specific faculty member for the upcoming year.



WHAT ARE THE CHALLENGES?

- I Faculty who are unaware of the change.
- I Navigating People Admin for those unfamiliar with it.
- I Some will still try to make this an annual goal setting document.
- I Because the PD no longer includes goals for the year, the annual evaluation process also changes.
- I Reminder: *It will be more work this year, but much less work in future years!*



WHAT TRAINING WILL BE PROVIDED?

- I Administrative Assistants were updated on Aug. 8.
- I Deans (Provost's Council) were updated on Aug. 20.
- I Associate Deans were updated on Aug. 28.
- I Faculty Senate was updated on Sept. 18
- I Training for unit administrators and college AAC personnel is TODAY!
- I An email communication will go to faculty by Monday. It will include instructions, FAQ, etc.



PROCESS SUGGESTIONS

- I We encourage unit administrators to still discuss PD changes with faculty members. It should be an interactive process.
- I FIRST collect and write details THEN enter information into People Admin.
- I Try to avoid lots of back-and-forth with faculty in People Admin.
- I AAC personnel need to work with Deans on their preferred approval process AND developing PDs for faculty administrators.
- I Each unit and college needs to discuss their process.



University
of Idaho

PEOPLE ADMIN TOUR

UNIT ADMINISTRATOR
DIRECTIONS

FACULTY MEMBER
DIRECTIONS



SAMPLE: DESCRIPTION OF EXPECTATIONS

This faculty member is expected to teach a 2:2 load (12 credits per year) in Wildlife Studies according to the needs of the department and as directed by the department chair. The faculty member will conduct research in the field of elephant studies, publish such research in peer reviewed journals, present findings at professional conferences, and submit proposals to extramural agencies to fund this work. The faculty member is expected to participate in some outreach activities as directed by their chair or dean. The faculty member is expected to attend faculty meetings, and to participate in committees at the department level and the college or university level.

[672 characters, 107 words]



WHAT NOT TO INCLUDE

I FMLA leave

I ADA accommodations

I Medical issues

I Personal information

I Etc.



WHAT IS A “SUBSTANTIAL CHANGE”?

- I Sabbatical Leave
- I Administrative Assignments
- I External funding buyouts
- I Major teaching changes
- I Etc.



WORKFLOW

I Developing the PD

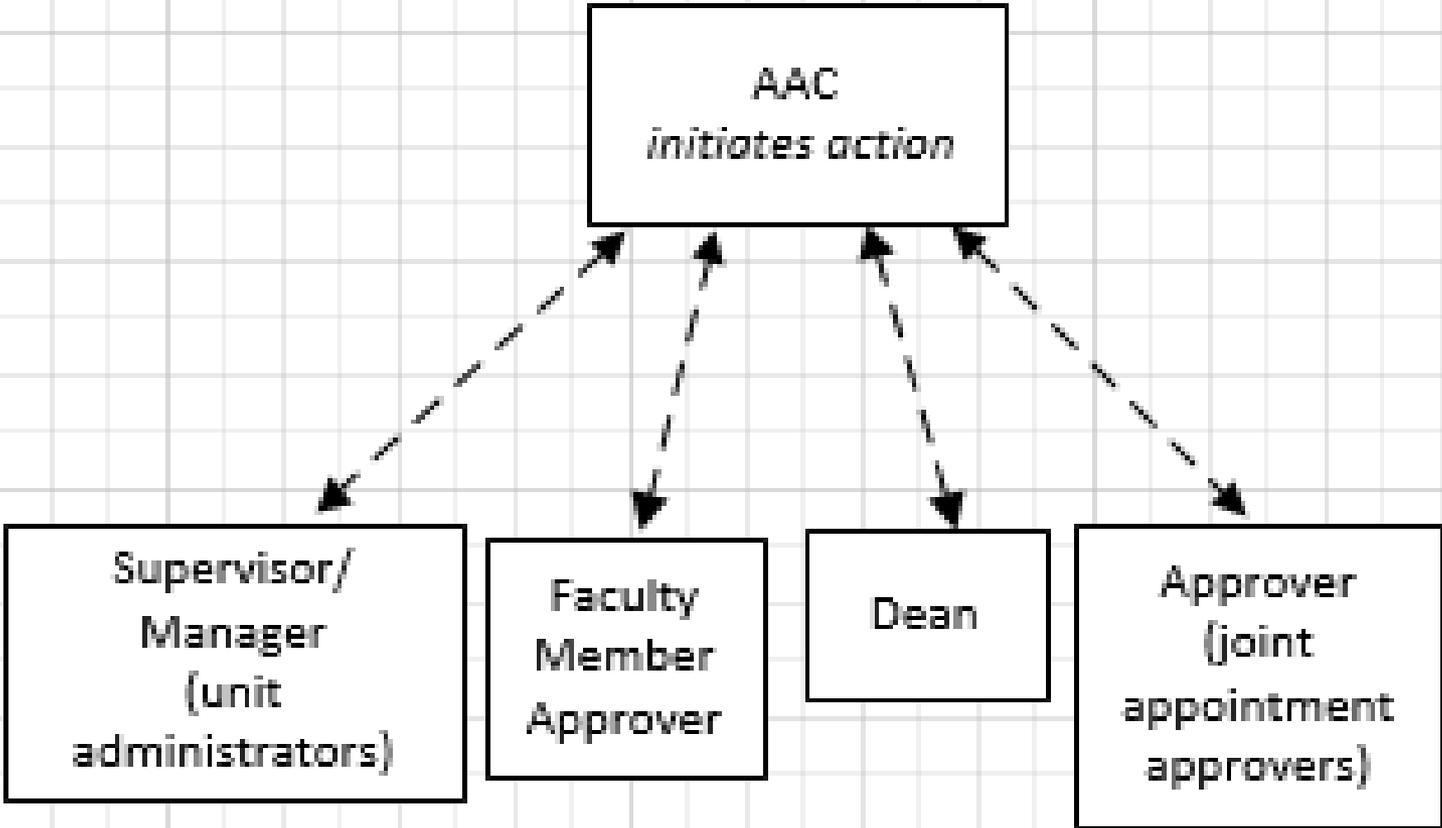
I Obtaining Signatures

**Supervisor/
Manager**
can initiate action

**AAC Review &
Routing**
can initiate action

**Faculty Member
Approver**







WHAT ARE THE DEADLINES?

- I** Oct 12 New hires (no new hires?)
- I** Nov 9 Assistant Professors
- I** Nov 30 Associate Professors
- I** Dec 14 Full/Dist. Professors & Administrators



POP QUIZ!

Q: When are the 2019 position descriptions due in People Admin?

A: ?



HOW DOES THIS CHANGE ANNUAL EVALUATIONS?

- I** The link between PDs and Evaluations was intentionally lessened in FSH 3050 from “the essential frame of reference” to “serves as a reference for”.
- I** Look at the “bottom box” of form 3320:
“Commentary/recommendations on progress toward tenure, promotion, and/or continued satisfactory performance.”

Outreach and Extension ⁴				
University Service and Leadership ⁵		2018 ←		
Overall faculty member met or exceeded the expectations defined in the position description				

Commentary/recommendations on progress toward tenure, promotion, and/or continued satisfactory performance.*

2019 →

*Relationship to Promotion and Tenure Process. The faculty annual performance evaluation is an administrative review. Annual evaluations are one component of the independent promotion and tenure process. See FSH 3520 and 3560 for details on the promotion and tenure process.



NEED HELP?!?!

I Questions about the PD process/changes?

- **Joana Espinoza**

- jespinoza@uidaho.edu or 885-7941

I Questions about People Admin software?

- **Mandy Brocke**

- mandyc@uidaho.edu or 885-3611

I Provost's website

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Position Descriptions

All university faculty holding rank have a position description (PD) as outlined in [FSH 3050 "Position Descriptions"](#). It establishes each faculty member's duties in the four major responsibility areas of Teaching and Advising, Scholarship and Creative Activities, Outreach and Extension and University Service and Leadership identified in ([FSH 1565 C](#)).

The position description serves as reference in the annual performance evaluations of faculty and in the consideration of faculty members for promotion ([FSH 3560](#)) and tenure ([FSH 3520](#)).

This process was significantly revised in spring 2018. Changes include moving to an online system, a new PD format, new PD content and the elimination of an annual process.

The [Calendar for U of I Faculty Processes](#) establishes the timeline and identifies deadlines for submitting documents to the Provost's Office. Deadlines for the new process in fall 2018, however, are as follows:

- Oct 12: New hires (if no new hire, then complete at least one

Resources

[Frequently Asked Questions](#) > PDF[PeopleAdmin Directions for Faculty](#) > PDF[PeopleAdmin Directions for Unit Administrators](#) > PDF[PeopleAdmin Approval Workflow](#) > PDF



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QUESTIONS?