

NEW POSITION REQUEST

Use for Proposed New Budget Position(s)

Fiscal Year: _____

Before completing this form, inform the County Administrative Office (CAO) that a new position with possible budget impact is contemplated and get authorization to proceed with planning activity.

Submit the completed Proposed Position Request form and any additional documentation to the CAO. **If approved** , the CAO will forward to Human Resources for class determination.

A current organizational chart that includes the proposed position must be attached before this position can be reviewed.

Position Number: _____ (assigned by HR) FTE: _____

Department: _____

Division: _____

Program: _____

Proposed Classification: _____

The proposed classification is: ☐ New ☐ Existing

Working Title: _____

Proposed Title: _____

Contact Person: _____ Phone Number: _____

COUNTY ADMINISTRATIVE OFFICE REVIEW

JUSTIFICATION: *State why this position is needed. How does it support business goals? Include organization chart that includes the proposed new position.*

Example: This job exists to assure clear and accurate written materials are prepared by the department director's office. The position creates budget documents, general correspondence and a monthly department communication to staff and stakeholders.

If you need more room, reference and add on in an addendum at the end of the form.

FUNDING: *Describe the financial impact of the proposed position. How will the position be funded? Include New Position Cost Estimate Form .*

SIGNATURE AND ROUTING PAGE - **Current Fiscal Year**

If position will be added to the budget in the **Current Fiscal Year**, follow routing and signature instructions below:

<u>Date Routed</u>	<u>Routing</u>	<u>Action</u>
_____	Department	Complete form and required attachments; send to CAO
_____	CAO	Approval of new position; send to HR for classification
_____	Human Resources	Upon approval of new position by the Board, HR enters into WISARD; notify Department that position has been added

REQUESTED BY:

Signature: _____
(Department Head)

Date: _____

NEW POSITION APPROVED BY:

Signature: _____
(County Administrative Office)

Date: _____

SIGNATURE AND ROUTING PAGE - *Next Fiscal Year*

If position will be added to the budget in the *Next Fiscal Year*, follow routing and signature instructions below:

<u>Date Routed</u>	<u>Routing</u>	<u>Action</u>
_____	Department	Complete form and required attachments; send to CAO
_____	CAO	Initial approval to add FTE to PSB; send to HR for classification/ addition to PSB
_____	Human Resources	Enter new position into PSB; notify Department
_____	CAO	Final approval sign-off; send signature page only to HR
_____	Human Resources	HR Liaison notifies dept - approved packet received

REQUESTED BY:

Signature: _____
(Department Head)

Date: _____

NEW POSITION APPROVED TO BE ADDED TO PSB BY:

Signature: _____
(County Administrative Office)

Date: _____

Upon signed approval, route this New Position Request Form to Human Resources (ATTN: Jan Paris) along with the required organization chart and Excel worksheet – New Position Cost Estimate Form.

Position No.: _____

Job Title: _____

Department: _____

NEW POSITION APPROVED TO REMAIN IN PSB/BUDGET BY:

Signature: _____
(County Administrative Office)

Date: _____

Signature: _____
(Department Head)

Date: _____

Upon signed approval return this Signature Page to Human Resources (ATTN: Jan Paris). This approved signature page will be matched with the original packet, scanned in and emailed to the applicable HR Liaison with a cc to the initiating department. Release of the packet to the HR Liaison provides notification that the position analysis work may begin.

HUMAN RESOURCES POSITION REVIEW

EQUITY: *Are there existing positions doing similar work? If yes, please indicate the position numbers.*

ESSENTIAL DUTIES:

In the table on the following page, list the essential duties of the position (those duties that make up at least 5% of working time) and the decisions that the incumbent will be required to make to carry out each duty. Provide enough detail to ensure a clear understanding of what is required of the position. For example, instead of simply stating "prepares reports", state "prepares reports such as status reports, staff reports", or other type of report(s) required to be prepared. Use action verbs such as prepares, calculates, operates, etc., to start off each statement. Avoid phrases such as "assists with" or "participates in." **Do not use acronyms** .

In the Frequency column, please indicate how often each duty is to be performed: D = daily, W = weekly, M = monthly, Q = quarterly, A = annually, O = occasionally.

In the "Percent of Time" column please indicate approximately how much of time will be spent on each task. The total of these percentages **should not be more than 100%**. *Example: Conducts property value estimates 20% of the time may mean one day out of five on that task, or around two hours each day on that task. These need only be estimates. The percentages of essential duties should not exceed 100%, but should account for at least 80% of work time.*

LIST ACTUAL ESSENTIAL DUTIES BELOW EXAMPLES

Essential Duties (What is required and how it is done)	Decisions Required	Frequency: D = Daily W = Weekly M = Monthly Q = Quarterly A = Annually O = Occasionally	% of Time
EXAMPLES:			
<i>Prepares monthly newsletters by gathering information, writing copy, editing, preparing for publication and overseeing distribution.</i>	<i>Articles to include, editorial changes, graphics, layouts</i>	M	25%
<i>Performs inventory spot checks and monthly counts of supplies in warehouse.</i>	<i>When to check supplies</i>	M	10%

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If more space is needed, add to an addendum at the end of the form.

QUALIFICATIONS FOR ENTRY: *List education level and any licenses, certifications, specialized knowledge or skill required for entry into the position.*

SUPERVISION RECEIVED:

This position receives supervision consistent with that described below:

- ☐ **Immediate Supervision** – Work assignments are routine or given with explicit instructions. There are few, if any, deviations from established practice without checking with the supervisor.
- ☐ **General Supervision** – Assigned duties require the exercise of judgment. Incumbent may choose among possible actions, sometimes without clear precedents. Incumbent may or may not work in proximity to their supervisor.
- ☐ **Direction** – Incumbent is expected to operate with a reasonable degree of independence. General instructions are provided regarding the scope and approach to projects or assignments, but procedures and techniques are left to the discretion of the incumbent.
- ☐ **General Direction** – Incumbent is responsible for a program or function(s) and is expected to carry out necessary activities without direction except as new or unusual circumstances require. (For positions of Manager or above)
- ☐ **Administrative Direction** – Incumbent has broad management responsibility for a large program or set of related functions. Administrative direction is usually received in terms of goals; review is received in terms of results. (For positions of Manager or above)

SUPERVISION EXERCISED:

☐ **Yes** (identify the type of supervision below)

☐ **No**

This position leads or exercises supervision as described below:

- ☐ **Direct Supervision** – Responsible for the administration of line personnel functions including selection, training, coaching, motivating, discipline, and formal performance evaluations. Also responsible for technical and functional supervision as defined below.
- ☐ **Technical Supervision** – Responsible for prescribing procedures, methods, materials and formats used in recurring projects of particular area(s) of work.(i.e., training of other employees in particular work methods and procedures).
- ☐ **Functional Supervision** – Responsible for recurring work projects or activities involving other employees to whom you give direction and guidance is given by the incumbent (i.e., lead supervision for a project or set of work activities including assigning, monitoring and reviewing the tasks and duties performed by other employees).

WORKING ENVIRONMENT: *Identify any unusual working conditions which are not described in the proposed classification specification (i.e., extreme temperatures, noise, confined work space, shift work, etc.)*

PHYSICAL ACTIVITY: *Check the box that best describes the overall amount of physical effort required for the position :*

- ☐ **Sedentary Work** : Exerting a negligible amount of force occasionally to lift, carry, push, pull or otherwise move objects, including the human body. Sedentary work involves sitting most of the time.
- ☐ **Light Work** : Regularly or frequently exerting a small amount of force (typically up to 20 pounds) to lift, carry, push, pull or otherwise move objects.
- ☐ **Medium Work** : Regularly or frequently exerting a medium amount of force (typically up to approximately 50 pounds) to lift, carry, push, pull, or otherwise move objects.
- ☐ **Heavy Work** : Regularly or frequently exerting a larger amount of force (typically up to 100 pounds) to lift, carry, push, pull, or otherwise move objects.
- ☐ **Very Heavy Work** : Regularly or frequently exerting a large amount of force (typically in excess of 100 pounds) to lift, carry, push, pull, or otherwise move objects.

Identify any additional unusual physical activities that are not described above:

This document describes this position's essential job content, specialized knowledge and skills, working environment and physical demands accurately and fully.

Signature: _____
(Department Director)

Date: _____

**SAMPLE
ORG CHART**

Snow White
Director
Position #00000
R067M

Mining Section

Sleepy
Mining Super.
Position #11111
R021

Dopey
Mining Wkr
Position #22222
R019

Sneezy
Mining Wkr
Position #33333
R019

Delivery Section

Doc
Delivery Super.
Position #44444
R021

Sleepy
Delivery Clerk
Position #55555
R019

Happy
Delivery Clerk
Position #66666
R019

Cleaning Section

Bashful
Cleaning Super.
Position #77777
R021

Grumpy
Cleaning Wkr
Position #88888
R021

Vacant
Cleaning Wkr
Position #99999
R021

Reset All Data
Entry Fields

SAMPLE

E-Mail As An
Attachment

Print Form

NEW POSITION COST ESTIMATE FORM

Department/Division name	SUPPORT SERVICES, FINANCE DIVISION
Fund	100 GENERAL FUND
Org Unit	FINANCE
Program	351505 FINANCIAL MANAGEMENT SERVICES
Reporting Category	NONE
Job Classification	170 Software Applications Specialist
FTE	1.0 FTE = 40 Hours Per Week
Employment Category	Full Time - Regular
Rep Code	Non-Represented
Position start date (also PERS start date for budget purposes)	Dec 10, 2011
Annual Wages	\$ 58,000.00
Benefits (formula based on wages) % 23.4318	13,590.44
Other Employee Allowances (e.g., car allowance)	0.00
Total Personnel Services	71,590.44
Supplies - office, general	100.00
Books, subscriptions and publications	100.00
Communications - services	
Dues and membership	250.00
Training and education	600.00
Travel expense	1,000.00
Private mileage	
Permits, licenses and fees	
Other materials and services:	
Workstation - \$3,500	3,500.00
Ergonomic chair - \$700	700.00
Electrical/low voltage wiring - \$1,000	1,000.00
Computer - \$1,200	1,200.00
Total Materials and Supplies	8,450.00
	0.00
	0.00
Total Capital Outlay	0.00
Total estimated cost for new position	\$ 80,040.44

Cost Estimate for New Position approved by:

Michael Cooper

Digitally signed by Michael Cooper
DN: cn=Michael Cooper, o=Support Services, ou=Finance,
email=miha_cooper@co.washington.or.us, c=US
Date: 2011.12.13 13:35:59 -0800

Approved: Yes ☐ No ☐

CAO Approval: John R Doe

Digitally signed by John R Doe
DN: cn=John R Doe, o=Finance, ou=Support Services,
email=john_doe@co.washington.or.us, c=US
Date: 2011.12.13 13:34:16 -0800

Date: December 8, 2011

ROUTING: New Position Request packet routed to HR upon signed approval by CAO

Date received in HR:		Date HR entered P/S in PSB:	
Date HR notified department of approval:			
Department enters non-Personal Services data:			

ADDENDUM 1

REFERENCE:

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ADDENDUM 2

REFERENCE:

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ADDENDUM 3

REFERENCE:

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