

**Memorandum of Agreement (MOA) between
Portland State University (University) and
the Portland State University Chapter of the American Association of University
Professors (Association)
August 08, 2020**

**Subject: Process for the initial placement of Academic Professionals (APs) into new Job
Family, Career Tracks and Career Levels**

Recitals

PSU has created a new system of classification for Academic Professionals. This includes the creation of new Job Families, Career Tracks, and Career Levels). See attached Appendix V. The following outlines the process that PSU Human Resources (HR) will use to initially place AP's into their new Job Family, Career Track and Career Level. This process does not pertain to ongoing job placement review requests after the initial placement process.

This Memorandum of Agreement has been negotiated by the University and the Association during the Successor Bargaining period (2019-2020). Parties agree that this MOA, once ratified by Association membership, will be implemented prior to the ratification of a full contract.

Agreement

The Position Description (PD) review and Job Family, Career Track and Career level placement process will be completed within 60 days of the initial communication.

Position Description Review Process

1. Upon ratification of the MOA, no earlier than April 1, 2020, HR will send a joint email from PSU HR and the Association to the employee and the supervisor. This notice will introduce the new classification system and the placement of AP's in this new classification system. (See Appendix I) All departments will provide time during regular work hours for AP's to review and revise their Position Description (PD) so that it accurately describes the work and duties performed at the time of placement.

Generally within thirty (30) working days following this joint communication, the following activities will take place:

- a. HR will email all supervisors with information regarding the PD update process and timeline.
- b. APs and their supervisor will be provided an opportunity to review the PD.
- c. The supervisor and AP shall meet to review the PD, discuss the AP's job duties and role, and discuss any changes that will be made. The review is not an evaluation of the AP's job performance, but it is to accurately capture the AP's job duties.



- d. After the meeting with the AP, the supervisor will update the PD via PeopleAdmin. If no changes are made, the supervisor will make note of the lack of changes in PeopleAdmin. HR will send a reminder to involved parties two weeks into this thirty (30) day PD update process.
2. Following the update of the PD (regardless of whether any changes were made) HR will send a confirmation email to both Supervisor and AP. The HR confirmation email will include a link to PeopleAdmin, instructions on how to access the updated PD and a Position Description Feedback form for the AP.

The Position Description Feedback form (See Appendix II) is designed to collect information from APs about the PD update process including:

- when the AP reviewed their PD with their supervisor,
- AP concerns with the Position Description, if any, and ,
- whether they wish for HR to contact them.

Based on the responses from the Position Description Feedback form the following actions may result:

- a. **No response:** HR will send a follow up email within 5 days of the initial email.
- b. **No review:** Should the AP indicate that they had no review or meeting with their supervisor, HR will follow up with the supervisor to confirm the situation and - if necessary - the supervisor will set up the PD meeting.

HR Follow-up: Should the AP request follow up from HR, HR will contact the employee within a reasonable time, not to exceed 5 days, to review the feedback, explore the issues and work with them to resolve the dispute about the PD. HR will make the final determination on the PD if the dispute cannot be resolved.

Classification Process

3. Following the PD review, HR will make a Job Family, Career Track and Career Level placement for the AP.
4. The supervisor and AP will receive an email with the Job Family, Career Track, and Career Level placement of the AP. (See Appendix III and Appendix IV) The Association will receive a listing of this data for Association members. This email notification to the AP will provide information regarding a review and appeal process (see Section 5 below).

Review/Appeal Process



5. **Review & Appeal of the Classification Placement Decision:** The process below is to be followed sequentially by APs who would like further review of their classification placement.
- a. *Review by HR:* If an AP requests an appeal within 30 working days of the date when HR issued the placement decision, HR will review the request and any supplemental information the AP has submitted. HR will forward a copy of the review request to the Association upon receipt. HR representatives will utilize all information provided and the Classification framework to re-assess the AP job duties. HR may reach out to the supervisor to receive additional information. HR will provide a copy of the appeal to the supervisor and to the Association.
 - i. HR will send a Review of Position Placement Notification to the AP, their supervisor, and to the Association. The notice will inform the AP of the results of the HR review and will include the classification placement form as updated during the review as well as any other information that was considered with additional written justification and rationale for the placement decision. This review process will take no more than 30 days from when the AP requests the review.
 - ii. Within 15 working days of receiving the Review Position Placement Notification email, the AP may appeal the results to the First Level of Appeal.
 - b. *First Level of Appeal:* Appeals go to the Associate Vice President for Human Resources (AVP-HR) in writing. The request shall state the basis upon which the employee is requesting the review. The AVP-HR will forward a copy of the appeal to the Association upon receipt.

A standing Appeals Advisory Committee to the Associate Vice President for Human Resources with cross-campus representation will provide input and recommendations to the appeals. The Appeals Advisory Committee will have at least two members who are appointed by the Association and two members representing PSU who are appointed by the Administration. One alternate from each team shall be identified by each party. APs serving on the committee shall be provided release time or overload to participate on the committee. The Appeals Advisory Committee shall have access to all prior placement process documentation, including the documentation used by HR to make the initial placement decision and the review. The decision on the appeal made by the Associate Vice President for Human Resources must be communicated in writing to the Academic Professional, to their Supervisor, and to the Association within thirty (30) working days of the date the appeal was filed.

- c. *Second Level of Appeal:* If the Academic Professional is dissatisfied with the appeal decision of the Associate Vice President for Human Resources, he/she may advance the appeal in writing to the Provost, or other relevant vice president,




within fifteen (15) working days from the date on which the decision was communicated. The Provost, or other relevant vice president, shall forward a copy of the appeal to the Association upon receipt. The Provost, or other relevant vice president, will provide a written response and rationale to Academic Professional, Supervisor, and the Association within fifteen (15) working days.

6. Placement decisions are not grievable and are not subject to Article 28. Grievances may be filed based on violations of proper process as specified in this MOA.

This MOA will become effective upon signature and ratification of the parties. The initial communication to commence the process shall begin within sixty (60) days of ratification. The MOA will be incorporated into the successor agreement in the appendix.

<u>For the University</u>	<u>For the Association</u>
<p style="text-align: center;">DocuSigned by: </p> <hr/> <p style="text-align: center;">Shelly Chabon, Vice Provost for Academic Personnel & Leadership Development</p>	<p style="text-align: center;">DocuSigned by: </p> <hr/> <p style="text-align: center;">Mark Leymon, VP Collective Bargaining</p>
<p style="text-align: center;">August 10, 2020 2:19 PM PDT</p> <hr/> <p style="text-align: center;">Date</p>	<p style="text-align: center;">August 10, 2020 4:30 PM PDT</p> <hr/> <p style="text-align: center;">Date</p>

MOA Appendix I-1

Appendix I - Joint AAUP/PSU Communication about Position Description Validation Process

Dear AP,

In the 2015-2019 Collective Bargaining Agreement, the University and AAUP conducted a classification study of the current Academic Professional (AP) job families and levels (Letter of Agreement #8). This study, conducted by a jointly selected outside consultant, resulted in the adoption of a new job family structure for Academic Professional and Unclassified/Unrepresented employees. In part, this new structure includes more specific job families and six individual contributor levels for each position category.

PSU AAUP and the University have agreed on procedures that will ensure an accurate and efficient transition from the old job family system to the new one. Supervisor and Academic Professional input are critical to this process. Given the diversity and complexity of Academic Professional positions, the supervisor and the Academic Professionals they directly supervise have the best understanding of what these positions entail.

The first step of the transition is a position description update/validation process. AP positions will be re-categorized into the new job family/IC level system based upon their position description. Since we currently do not have a process for regularly updating position descriptions, many AP position descriptions are out-of-date. To support the classification process, the first step is a position description review, update if necessary, and validation, all of which are critical to the timely and accurate placement of positions into the new structure.

Over the next 2-3 months, all of the AP position descriptions will be reviewed and updated along the following general timeline.

Step 1: Supervisors meet with APs to review and discuss position descriptions.

Step 2: Supervisors update position descriptions in PeopleAdmin as discussed and where necessary.

Step 3: Once AP position descriptions have been updated, APs will be notified so that they have an opportunity to review the revised position and provide feedback about the process.

The steps of the position description validation process are available online and focus on the importance of feedback between APs and Supervisors.

You will receive additional information shortly regarding the specifics of your role in this process as an employee or a supervisor. All emails from HR related to this subject will be prefaced with the [AP CLASS] tag (see this email for an example) to help them to stand out and enable you to locate and prioritize them.



MOA Appendix I-2

Thank you in advance for your participation in this process. We all share in the responsibility for ensuring that position descriptions accurately reflect the work being performed by each PSU employee. If you have questions at any point during the Position Description review or subsequent Classification, please do not hesitate to contact PSU HR at askhrs@pdx.edu or AAUP at aaup@psuaaup.net .

Thank you,

Human Resources
Portland State University

A handwritten signature in blue ink, enclosed in a blue rectangular box with rounded corners. The signature is cursive and appears to be "M. H.". Above the signature, the letters "DS" are printed in a small font.Handwritten initials "MH" in blue ink, enclosed in a blue rectangular box with rounded corners. Above the initials, the letters "DS" are printed in a small font.

MOA Appendix II-1

Position Description Review Confirmation

This brief form is part of the AAUP Position Description Review prior to the Classification of your position. Additional information about the Classification process can be found at

<https://www.pdx.edu/hr/job-classification>.

* Required

1. Email address *

2. Your name

3. Did you review your position description with your supervisor? *

Mark only one oval.

Yes

No

4. If you did meet with your supervisor, on what date did you review your Position Description?

Example: January 7, 2019

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5. Overall, do you agree with the assigned job duties and responsibilities as outlined in your Position Description? *

Mark only one oval.

- Yes Skip to section 5 (Thankyou!)
- No

6. Please describe those concerns:

7. Would you like HR to contact you?

Mark only one oval.

- Yes
- No Skip to section 5 (Thankyou!)

8. Contact Information (email/phone/etc)

Skip to section 5 (Thank you!)

We highly encourage you to take a moment to review your position description on file and to speak to your supervisor to ensure that it accurately reflects your job duties and responsibilities. Your position description will be used to accurately place your position in the upcoming classification framework. To review your position description, please [click here]. To learn more about the new Classification framework, [click here].



Thank
you!

Thank you for taking the time to complete this survey. Accurate, up-to-date position descriptions are a very important component of the classification process. If you have additional questions or concerns, please contact HR at HR_ClassComp@pdx.edu.

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Google Forms

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MOA Appendix III-1

Appendix III- Email to AP and supervisor with the Job Family, Career Track, and Career Level placement of the AP

Dear "Column A",

We are pleased to announce that Human Resources has completed placements of all AAUP Academic Professional (AP) positions into the new classification and compensation structure. The structure is intended to enhance internal and market-based equity, and reflects our commitment to a fair and equitable workplace.

Our goal is to properly place all positions into job groupings/families, career tracks, and career levels. The job placement is intended to align jobs across units.

Below, you will find your final position placement. We placed positions based solely on the position descriptions provided in PeopleAdmin and feedback from you and your supervisor.

Position:	Rationale from HR for Classification	
Position number:	Column B	
Current working title:	Column C	
HR designated position title:	Column D	

Evaluation:		
Job Role:	Column H	
Job Impact & Complexity:	Column I	
Min & Preferred Requirements:	Column J	

Classification		
Job grouping/family:	Column E	
Career track:	Column F	
Career level:	Column G	

We encourage you to review your placements by visiting our class/comp page:




MOA Appendix III-2

- Job groupings/families, click here: https://www.pdx.edu/hr/sites/www.pdx.edu.hr/files/PSU_Job_Groupings.pdf
- Career track and level definitions, click here: <https://www.pdx.edu/hr/sites/www.pdx.edu.hr/files/Job%20Level%20Guide%20-%20PSU%20-%20APs%20and%20Un-Uns.pdf>
- Classification process: <link here>

Please take the time to review the placement decision. If you would like to pursue an appeal after reviewing the decision, please refer to the review and appeal process. [Link]

We want to thank all employees for their hard work and dedication to Portland State University.

Thank you,

Human Resources
Portland State University



Classification Process

This document is designed to provide you with details and resources related to how positions are analyzed and placed within the classification framework.

PSU's Classification Process helps to bring consistency to the placement of a position into a classification structure. Our goal is to properly place all positions into job groupings/families, career tracks, and career levels. The job placement is intended to align jobs across units. Throughout this process it is important to recognize that position analysis and classification is conducted based on the position, not the person currently filling the position. This is commonly referred to as an "incumbent neutral process." The overall Classification Process consists of the following steps -

1. Updated [Position Descriptions](#) (PDs)
2. **Job Analysis & Classification:** Our goal is to accurately place each Academic Professional position into a new classification system. Each position description will be placed into a new Job Grouping/Family, Career Track and Career Level. [Details about this process are available below.](#)
3. [Reviews & Appeal](#) - Collective Bargaining Agreement Article 17.4

JOB ANALYSIS & CLASSIFICATION

Position Descriptions are used to determine the correct placement of the position in the framework.

- [Job Family](#): A position is placed in a Job Grouping/Family based on common roles, responsibilities, skills. Job Groupings/Families are described online [here](#).
- [Career Track](#): Career tracks represent the overall career progression of a position (not an employee). Career tracks are described in more detail [here](#).
- [Career Level](#): Career levels are described in more detail [here](#).
 - [Job Role](#) – job duties and responsibilities
 - [Job Impact and Complexity](#) – supervision received, decision making authority, contacts and communications, lead work and delegation of work to other employees, and budget authority.
 - [Minimum and Preferred Requirements](#) – education and work-related experience

Career levels are determined by reviewing the position description. The PD is used to assign a level to each of the above subcategories. Details about the characteristics of each level can be found in the Job Level Guide linked above under 'Career Level'. Overall Career Level is set based on the majority (>50%) of subcategory levels.

 If you have any questions about this process, additional information is available online or by emailing PSU's HR Compensation team at hrclasscomp@pdx.edu.

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Job Groupings (Job Families)

Portland State University

JOB GROUPING	DEFINITION	JOB FUNCTION/SUB-GROUP EXAMPLES
Academic Services	Involves activities related to programs that enhance the academic environment for students, support faculty development, conduct ongoing assessment and provide institutional data	Assist, direct, or administer one or many external programs which aid in the support of undergraduate, graduate, and faculty programs. Design, development, implementation and/or evaluation of programs, including technical support.
Administrative Support	Involves activities related to administrative support services for the University's offices and departments	Provide assistance and administrative support to one or many departments, executives or managers. Support may include preparation of documents or materials, organization and facilitation of meetings, events, conference calls, supervision of staff, coordination of confidential or sensitive information.
Advising and Student Services	Involves activities related to supporting and enhancing the quality of student and post graduate life at the University	Provides services and administration of admissions, academic and career advising, career development/placement services, financial aid, registrar, residential life, student activities/events, education abroad, immigration, post-graduate support, recreational sports, management of student housing.
Athletics	Involves activities related to the operations of athletic programs	Provide management and administrative oversight of operations of athletic programs, athletic coaching, equipment management, training and conditioning, technical support and infrastructure.
Communications / Marketing	Involves activities related to promoting the University and its services to multiple internal and external constituencies through a variety of media, may involve governmental affairs and/or relations	Provides design services, communications and media relations, events management, and marketing.
Executive / Chief Officers	Involves offices holding the top administrative positions, with campus-wide reach	Provides direction for setting policy and course of action for the University.
Facilities / Operations	Involves activities related to the procurement, design, construction, inspection, maintenance and operations of the University's properties, buildings and grounds	Provides management of the maintenance and repair of university property, facilities planning and design, management of environmental health and safety programs.
Field, Research, and Outreach Services	Involves activities related to the field, extension, and teaching/research locations and partner institutions on and off the main campus. Involves activities related to research project management and data collection	Provides administration, research for and delivery of community outreach programs, field work or data collection.

Job Groupings (Job Families)

Portland State University

JOB GROUPING	DEFINITION	JOB FUNCTION/SUB-GROUP EXAMPLES
Fiscal Services	Involves activities related to the planning, forecasting and delivery of the University's financial operations	Provides services and administrative oversight for University accounting, billing/collections, financial analysis, budget and finance, payroll, purchasing, procurement, grants administration.
Healthcare Administration	Involves activities related to leadership in the clinical and basic sciences areas of healthcare administration	Provides administration for health care, wellness training, counseling and psychological services, clinical, diagnostic education, community health outreach education, training, and services.
Human Resources & Organizational Development	Involves activities related to the delivery of services to support human capital needs for the University	Provides services and administration of training and development, equity and inclusion, administration and management of benefits, classification and compensation, HRIS, employee relations, labor relations, employment services.
Information Technology and Telecommunications	Involves activities related to the planning, developing and maintaining of information systems and operations	Provides services for application systems development, computer operations and help desk, information security, IT training, network infrastructure, telecommunications, web services, IT project management.
Legal and Compliance	Involves activities related to regulatory compliance and legal concerns	Provides administration and guidance to the university for compliance, risk management, intellectual property, legal services, accreditation/licensure, IRB, safety reporting, internal audit, contract negotiation, real property acquisition, AAEOE functions.
Library	Involves activities related to planning, acquiring and managing the access for the University's library and operations	Provides management of Library services, collections development and curation.
Safety and Security	Involves activities related to ensuring the security and safety of students, faculty, staff, and the campus and its facilities	Provide police presence on campus, provide supervisory roles to police unit.




This career path typically includes staff whose primary duties are administrative. Support staff are responsible for providing support and continuity of service to an assigned work unit, performing specific organizational tasks that are generally routine or where information and precedents are easy to obtain or interpret. Experience and knowledge may be gained on the job or acquired via industry experience. Support staff typically report to employees in the Management career path, and may supervise students but do not have supervisory responsibility over other staff, but may serve in a lead capacity. The distinguishing factors of this path are that (1) tasks and problems are usually routine to moderately diverse and (2) complex issues are typically referred to the immediate manager for guidance and resolution.

LEVEL	ROLE	IMPACT AND COMPLEXITY	MINIMUM REQUIREMENTS
TAS1	<p>Works under limited supervision in performing job responsibilities.</p> <p>Applies technical or process knowledge; requires capacity to understand specific needs or requirements to apply skills/knowledge.</p> <p>Responsible for own daily work and occasional projects. Not responsible for hiring, firing, disciplinary actions, etc.</p>	<p>Performs job responsibilities working within guidelines or traditional practice. May organize, set priorities, schedule, and review work of student workers or volunteers. Exercises judgment in prioritizing, planning, and organizing own work within time, process, and results requirements; has some flexibility to modify workflow based on need and circumstances.</p> <p>Decisions made address routine or non-routine questions and situations, often requiring investigation and/or research of precedents. Demonstrates ability to triage conflicting priorities and handle sensitive situations with tact and diplomacy.</p>	<p>Knowledge of standard policies, procedures, services, tools, and/or equipment in a field of specialization typically obtained by a Bachelor's degree or equivalent and 0 to 2 years related experience.</p>
TAS2	<p>Fully proficient in applying established standards for the job.</p> <p>Applies intermediate technical or process knowledge; requires ability to utilize diverse but conventional methods, techniques, or approaches to meet specific needs of an assignment.</p> <p>Responsible for own daily work and occasional projects. Not responsible for hiring, firing, disciplinary actions, etc. May direct activities of student workers.</p>	<p>Performs job responsibilities through use of specialized tools, job experience, and established standards. May organize, set priorities, schedule, and review work of student workers or volunteers. Prioritizes, plans, and organizes own work within time, process, and results requirements; determines processes and sequences to follow based on needs and urgency required by the circumstances.</p> <p>Decisions made use experience and expertise to anticipate department/discipline's needs, and handles the situation or identifies appropriate resource. Problems and issues faced are moderately complex and occasionally ill-defined and may need some analysis to understand. Some situations may require assessment, interpretation and analysis.</p>	<p>Knowledge of standard practices, policies, procedures, tools, and/or equipment in a field of specialization typically obtained by a Bachelor's degree or equivalent and 2 to 4 years of experience in the area of expertise.</p>
TAS3	<p>Work is performed by applying established standards independently through a broad and deep knowledge base of the University acquired from several years of experience in a particular area.</p> <p>Serves as a resource and guide to others in the department and/or University in questions of policy and procedural issues, precedents, etc.</p> <p>Responsible for own daily work and occasional projects. Not responsible for hiring, firing, disciplinary actions, etc. for staff employees. May lead or oversee the work of other TAS employees. May supervise student employees.</p>	<p>Performs job responsibilities through use of specialized tools, job experience, and established standards. Typically organizes, sets priorities, schedules, and reviews work of student workers or volunteers. Fully responsible for effectively and independently handling all job responsibilities within scope of authority.</p> <p>Decision and problems are varied, often complex, and involve multiple constituencies, often with competing priorities.</p> <p>Coordinates resources from other areas within the University and externally in order to achieve the appropriate outcomes. Handles situations that require assessment, interpretation and analysis.</p>	<p>Knowledge of the technical and practical concepts, processes, and methods in a field of specialization typically obtained by a Bachelor's degree or equivalent and 4+ years of experience in the area of expertise.</p>

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JOB LEVEL GUIDE | Career Track: **INDIVIDUAL CONTRIBUTOR**

This career path typically includes non-supervisory staff responsible for utilizing learned knowledge to provide impactful work output to the organization. An individual contributor is defined as an individual responsible for tasks, duties, assignments and projects ranging in complexity and analysis. Experience and knowledge are brought to the position, with entry level professional staff learning additional skills on the job. Individual contributor staff typically report to employees in the Management career path, with higher-level incumbent contributors reporting to Executives in an advisory or expert capacity. Individual contributors are not typically responsible for the formal supervision of staff as their primary duty but they may lead project teams or provide coaching and delegation of work to other employees. While not common, there are circumstances where individual contributors will manage staff.

LEVEL	ROLE	IMPACT AND COMPLEXITY	MINIMUM REQUIREMENTS
IC1	Performs professional level work. Independently resolves operational issues and problems. Provides data and information analysis.	Performs work assignments that require professional understanding or practices and procedures of a particular discipline. Works under general supervision where non-routine work products are reviewed for thoroughness and accuracy. Decision making typically influenced by guidelines and parameters. Responds to internal/external customers regarding procedures and policies based on a basic knowledge of a particular discipline.	Knowledge and expertise in concepts, principles, and practices of designated professional discipline typically obtained by a Bachelor's degree and 0 to 2 years of professional experience.
IC2	Provides professional expertise to the University community and external customers. Serves as a resource and guide to others in the department and/or University. May act as a lead to students.	Work is performed in accordance with professional standards or defined principles. Works under general supervision with employee participating in determining objectives. Guidelines normally require interpretation to ensure appropriate application. Decision making occurs in a context where solutions may be found from many diverse alternatives and there is often uncertainty and a lack of information. Establishes priorities and schedules. Experience and expertise is required to anticipate needs and handle unique situations.	Intermediate knowledge and expertise in concepts, principles, and practices of designated field typically obtained through a Bachelor's degree and 2 to 4 years of professional experience within functional area. Knowledge permits the employee to complete assignments through application of well-established principles and practices.
IC3	Provides full range of professional work, including addressing more complex and ambiguous issues. Works on operational issues as a seasoned professional. May act as a lead to other employees.	Work is performed in accordance with established organizational policies or external regulations. Employee operates under supervision expressed in terms of goals, priorities, and deadlines. Supervision is typical limited to special situations requiring advice. Interprets inadequate guidelines, develop plans, and initiate new methods to complete assignments. Performs work assignments that require in-depth knowledge of principles, concepts, practices, and procedures of a particular discipline to address complex and ambiguous issues and/or issues of a highly technical nature.	Seasoned knowledge and expertise in principles, concepts, and practices in designated field typically obtained through a Bachelor's degree and 4 to 6 years of professional experience or Master's degree with 2+ years of experience within functional area. Knowledge permits the employee to plan steps for and carry out multiphase projects and to modify techniques to solve a wide range of problems.
IC4	Regularly serves as a technical leader, expert, or program management for challenging and unique functions and programs that have direct and significant department level impact. May set strategies that align with the department or school. Acts as a lead to other employees, which may include students.	Work is guided by overall objectives and minimal supervision. Must make decisions based on inadequate guidelines that require considerable interpretation to ensure appropriateness. Supervision is limited to special situations requiring advice or joint problem solving. Manages complex or specialized projects. Assignments are diverse and unpredictable and require the ability to flexibly and creatively adapt technical know-how to novel situations. Sets objectives and related milestones in collaboration with senior management.	Expert knowledge and expertise in theories, concepts, and principles of designated field typically obtained through a Bachelor's degree in a related field of study and 6 or more years of professional experience or Master's degree with 4+ years within functional area. Knowledge permits the employee to structure systems and solve problems touching multiple programs, systems, and business functions.

<p>IC5</p>	<p>Serves as a program management or technical leader for a significant program or function. Leads efforts to address most challenging processes with significant consequences on the overall effectiveness and growth of the University. Collaborates with top management to deliver strategic business results. Sets strategies that align with the department or school. Acts as a lead to other employees, which may include students.</p>	<p>Work guided only by University strategic objectives that are established to provide general direction for obtaining end results. Breaks down University strategies and local objectives into meaningful goals. Establishes strategies to accomplish program and/or project objectives. Solves business problems, which requires a high degree of ingenuity and creativity; challenges are often unique. Creates wholly new methodologies and design strategies. Regularly works on systematic problems, which have significant financial consequences and require change management expertise.</p>	<p>Expert knowledge and expertise in theories, concepts, and principles of designated field typically obtained by a Master's or postgraduate degree or equivalent and more than 10 years of professional experience. Knowledge permits the employee to develop new hypotheses, theories, and concepts or to be recognized nationally as an expert in the specialized field.</p>
<p>IC6</p>	<p>Focuses on specialized field of professional expertise requiring extensive skills, knowledge, and education experience.</p>	<p>Provides specialized professional services such as legal, medical diagnosis, or psychological services. Strategically evaluate risk and suggest methods for mitigation. Executes appropriate courses of action based on application of specialized knowledge. Provides counsel and opinion in areas of expertise.</p>	<p>Typically requires a terminal (highest degree within the field) degree or advanced course of study. Requires professional license or certification, or actively working towards the certifications.</p>

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This career path includes supervisory and management staff who focus on tactical and operational activities within a specified area. A manager is defined as an administrator responsible for accomplishing the department objectives and operations of at least one work unit, which includes managing staff and short- and long-term planning of department activities. Employees in this career path take corrective action as necessary to ensure departmental goals are accomplished by established deadlines. The most important factors are (1) clear responsibility for managing a department / function and (2) formal supervision of at least two staff (non-student). Managing performance of staff requires writing and delivering performance evaluations and monitoring production and overall work quality. The entry job title used for this path is Supervisor. Generally, managers are responsible for the daily operations and work quality for assigned areas, and may have control or input over hiring, firing, promotion and reward authority for assigned staff or work teams. Positions allocated to this career path must meet the criteria for exclusion from the Collective Bargaining Agreements.

LEVEL	ROLE	IMPACT AND COMPLEXITY	REQUIREMENTS
M1	<p>Supervises work activities. Has input for personnel actions for team. Position at this level may have a portion of time spent on performing duties similar to those of direct/indirect report in the department, however, supervisory activities must be a primary job function.</p> <p>Accountable for the effectiveness and productivity of area.</p>	<p>The responsibilities for this position are clearly defined. Typically solves technical and operational problems using established guidelines and procedures.</p> <p>Works under general supervision and work progress/outcomes are reviewed for soundness of judgment and overall thoroughness and accuracy. Supervises workflow and processes that are clearly defined and routine. Work is guided by policies and standards. Work impacts the day-to-day objectives and results of job area.</p>	<p>Knowledge and expertise in designated field typically obtained through a Bachelor's degree and 1 to 3 years of lead and/or supervisory experience.</p>
M2	<p>Supervises/manages a work unit and typically has full authority for personnel actions for unit/team.</p> <p>May contribute to perspectives in the development of the area's operational plan. Accountable for achievement of job area's operational objectives.</p>	<p>Responsibilities require research, analysis and problem solving that is either deep in a particular subject area or broad, covering more than one specialty area.</p> <p>Work is performed in accordance with established organization policies or external regulations that may require some interpretation and/or selection to ensure that proper procedures are followed. Work has a significant impact on the achievement of results and operational objectives within the wider job area.</p> <p>Accountable for monitoring budgets and identifies opportunities for increasing revenue and containing costs and ensuring compliance with policies.</p>	<p>Knowledge and expertise in designated field typically obtained through a Bachelor's degree in a related field of study and 3 to 4 years of experience within functional area including supervisory experience.</p>
M3	<p>Typically responsible for the management of a unit performing diverse but related tasks. Responsible for work and budget planning for assigned functions.</p> <p>Contributes to the operational plans of the division, school, or major functional area. Accountable for achievement of short-term operational objectives within area/department.</p>	<p>Work is performed in accordance with professional standards or defined principles. Guidelines normally require interpretation to ensure appropriate application. Decision making occurs in a context where solutions may be found from many diverse alternatives and there is often uncertainty and a lack of information.</p> <p>Work requires interpretation and application of the function's operational strategy in order to set objectives for the department or unit. Work impacts the achievement of results within the job function or department.</p> <p>Contributes to the development of budgets and operational forecasts; accountable for monitoring budgets and identifies opportunities for increasing revenue and containing costs and ensuring compliance with policies.</p>	<p>Knowledge and expertise in concepts, principles, and practices of designated field typically obtained through a Bachelor's degree in a related field of study and 4 to 6 years of professional experience or Master's degree in a related field of study and 3+ years including significant management experience.</p>

<p>M4</p>	<p>Responsible for planning and overseeing diverse activities within a planning unit or functional area of the institution. Typically directs significant programs and operations through subordinate managers and professionals.</p> <p>Sets strategies and objectives that align with the overall strategy of the University.</p> <p>May contribute to University strategy development. Accountable for managing and communicating long-term direction and achieving broad strategies within the functional area.</p>	<p>Situations require analytical or evaluative thinking. There are significant intangibles or uncertainties.</p> <p>Coordinates and integrates diverse activities within a planning unit or functional area. Develops and manages budgets and business plans.</p> <p>Breaks down University and planning unit strategies into meaningful strategies and goals that affect the work activities and performance of one or more departments. Oversight is limited to special situations requiring advice or joint problem solving. Departs from standard protocols and methods in order to address unique and complex problems. Work significantly impacts the results of the planning unit.</p> <p>Manages and may develop budgets and operational forecasts; accountable for monitoring budgets and identifies opportunities for revenue enhancement and containing costs and ensuring compliance with policies.</p>	<p>Seasoned knowledge and expertise in theories, concepts, and principles of both management and designated field of study typically obtained through a Master's degree in a related field of study and 6 or more years of professional experience within functional area including experience managing a team of individual contributors. Knowledge permits the employee to structure systems and solve problems touching multiple programs, systems, and business functions.</p>
<p>M5</p>	<p>Responsible for planning and overseeing a significant and complex functional area or its equivalent.</p> <p>Formulates policies, strategies, and systems that best position the University in the competitive marketplace. Directs critical programs or functions through a diverse team of subordinate managers. May manage multiple layers of managers.</p> <p>Informs the University's long-term strategic vision. Accountable for managing and communicating long-term direction and achieving broad strategies within functional area that link directly to University-wide objectives.</p>	<p>Situations encountered are often unique and require the development of new approaches to problem solving.</p> <p>Develops and implements new initiatives to address complex problems and/or capitalize on opportunities. Develops systems, methods or approaches, and operating procedures. Responsible for integrating and aligning strategic plans for area with the University as a whole, assessing long-term needs and establishing objectives for a function.</p> <p>Decisions are guided by broad operating plans and strategic vision. Often the main decision point on issues that have major and long-term consequences for the University. Position provides long-term planning, legal compliance, budget management, and adherence to University policies for a major function. Work impacts the results of the University through the achievement of unit strategies.</p> <p>Develops and manages budget and operational forecasts; accountable for monitoring budgets and identifies opportunities for revenue enhancement and containing costs and ensuring compliance with policies.</p>	<p>Expert knowledge and expertise in theories, concepts, and principles of both management and designated field of study typically obtained through a Master's or postgraduate degree or equivalent and more than 10 years of professional experience. Knowledge permits the employee to develop new hypotheses, theories, and concepts. This will include significant experience in managing financial and human resources as well as experience developing, gaining support for, and executing short- and long-term strategic plans.</p>




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	PORTLAND, OR 97201-3256
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Signing Complete	Security Checked	8/10/2020 4:30:35 PM
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