Agenda

• Career Tracks Overview and Timeline
• Mapping to New Job Structure
• Mapping Partner Role
  • Round 1 Process
  • Planning Tips
  • Resources
Career Tracks Overview

<table>
<thead>
<tr>
<th>Career Tracks</th>
<th>Job Classification</th>
<th>Alignment with market</th>
<th>Career Paths</th>
<th>Development</th>
</tr>
</thead>
</table>

Senior Management Group, academics, represented staff and students are not affected.

Career Tracks will not affect job duties or function, working (“business card”) title or current base pay.
## Career Tracks Overview

<table>
<thead>
<tr>
<th>Current Structure</th>
<th>New Structure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jobs misaligned with market, poorly defined</td>
<td>MSP and PSS job titles aligned with market</td>
</tr>
<tr>
<td>Inconsistent practices present labor and legal risk</td>
<td>Consistent with definitions of represented work and federal overtime guidelines</td>
</tr>
<tr>
<td>Internal focus on classification and pay</td>
<td>Market-based salary ranges provide better reference for pay decisions</td>
</tr>
<tr>
<td>Job categories and career paths not defined</td>
<td>New structure provides transparency within and across job functions</td>
</tr>
</tbody>
</table>
## Career Tracks Overview

<table>
<thead>
<tr>
<th>Job Family</th>
<th>A group of jobs in the same general occupation (ex: Information Technology)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Function</td>
<td>A more specific area within a family (ex: Applications Programming)</td>
</tr>
<tr>
<td>Job Category</td>
<td>Individual Contributor Series</td>
</tr>
<tr>
<td>Operational &amp; Technical</td>
<td>Professional</td>
</tr>
<tr>
<td>Level 1</td>
<td>Entry</td>
</tr>
<tr>
<td>Level 2</td>
<td>Intermediate</td>
</tr>
<tr>
<td>Level 3</td>
<td>Experienced</td>
</tr>
<tr>
<td></td>
<td>Advanced</td>
</tr>
<tr>
<td></td>
<td>Expert</td>
</tr>
</tbody>
</table>

*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.*
Career Paths

Entry

Entry

Experienced

Intermediate

Professional/Technical Track

Leadership Track
Career Tracks History

2009
Career Compass job structure developed and implemented initially at Berkeley. Career Compass was subsequently renamed “Career Tracks” for systemwide rollout.

2012–2014
Career Tracks implemented at Merced, Office of the President (UCOP) and Agriculture and Natural Resources (ANR).

2015
Santa Cruz completed two phases of pilot for IT job family
Career Tracks implemented at Riverside.

2016 – 2017
Where are we Now?

Santa Cruz on track to fully implement Career Tracks job titles for all non represented staff employees by February 2017.
MAPPING TRAINING

Preview of Managers’ Training
Mapping to New Job Structure

1. Select Category
2. Select Career Level
3. Review Job Standard
4. Select family and function that seems best fit
<table>
<thead>
<tr>
<th>Job Family</th>
<th>Job Function</th>
<th>Job Function Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Admin</td>
<td>Administrative Operations</td>
<td>Involves managing or performing the administrative services or managing the full general operations of an academic or non-academic organization(s). Administrative services includes activities in finance and human resources and may also include IT, facilities, or student services. General management includes long and short range strategic planning in determining the mission and directing all activities of multi-disciplinary departments through subordinate management staff.</td>
</tr>
<tr>
<td>Project and Policy Analysis</td>
<td>Involves analytical studies on a variety of policies, projects, programs and issues in support of a function, program and/or organizational unit, or in research of new or changing systems and programs. Assists in policy and program planning, development and administration; interprets, monitors and analyzes information regarding policies and procedures and provides consultative services regarding general management to department administrators.</td>
<td></td>
</tr>
<tr>
<td>Information Technology</td>
<td>Applications Programming</td>
<td>Involved in the development of server/OS/desktop/mobile applications and services including researching, designing, developing specifications for designing, writing, modifying, testing, debugging, troubleshooting and maintaining source code. Also having direct or related involvement in designing related databases, user interfaces, integration to other systems/applications, content or multimedia processes. Work includes analysis and design to post-production processes, quality assurance, maintenance and documentation.</td>
</tr>
<tr>
<td>AV IT</td>
<td>Involves planning, coordinating and administering Audio Visual (AV) programs, processes, facilities and technical systems in support of education, research, conferences, events, communications or administrative activities, athletics and other purposes. Includes one or more of the following areas: technical, instructional or command media or video and audiovisual production. Works closely with and/or provides counsel to institutional representatives coordinating major projects or events.</td>
<td></td>
</tr>
<tr>
<td>Business Systems Analysis</td>
<td>Involves technology-based analysis of business practices, processes and problems; developing solutions which may involve process design, data and information architecture, software development and policy or procedural changes; creating specifications for systems to meet requirements; validating requirements against needs; designing details of automated systems; developing user interface design; planning and executing unit integration and end-user acceptance testing; may develop training materials for system implementation. May lead cross-functional teams to solve complex business or systems issues.</td>
<td></td>
</tr>
</tbody>
</table>
Many employees at UC wear multiple hats. 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
- Would be emphasized for recruiting when a vacancy arises
- Are captured in a “multi-functional” job family (ex: Information Systems in IT, HR Generalist)
Operational & Technical
• Includes

Professional
• Requires a theoretical

Supervisory & Managerial
• Incumbent
Select Career Level

Career Level: Professionals

Entry
- Limited or no prior

Intermediate
- Assignments

Experienced
- In-depth understanding

Advanced
- High degree

Expert
- Significant impact on
Select Career Level

Career Level: Supervisors

Supervisor 1
• Provides immediate supervision

Supervisory 2
• Provides direct supervision

Note: Incumbents who give work assignments to other employees and review their work products, but do not perform the above functions are typically LEAD positions and should be mapped to the Professional categories.
Manager 1
• Primary manager of

Manager 2
• Manages large

Manager 3
• Senior leader of a

Manager 4
• Senior leader of
Mapping Managers and Supervisors

<table>
<thead>
<tr>
<th>If number of direct reports is ...</th>
<th>And direct reports are primarily ...</th>
<th>Then consider the following Career Level or Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 or more FTE</td>
<td>Supervisory or Managerial</td>
<td>Managerial</td>
</tr>
<tr>
<td>2 or more FTE</td>
<td>Professional</td>
<td>Supervisor 2</td>
</tr>
<tr>
<td>2 or more FTE</td>
<td>Operational and Technical</td>
<td>Supervisor 1</td>
</tr>
<tr>
<td>Less than 2 FTE</td>
<td>Professional or Operational and</td>
<td>Professional</td>
</tr>
</tbody>
</table>
## Review Job Standard

<table>
<thead>
<tr>
<th>Job Family:</th>
<th>Finance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Function:</td>
<td>Financial Analysis</td>
</tr>
<tr>
<td>Category:</td>
<td>Professional</td>
</tr>
<tr>
<td>Job Title:</td>
<td>Financial Analyst 3</td>
</tr>
<tr>
<td>Job Level:</td>
<td>Experienced</td>
</tr>
</tbody>
</table>

### Job Function Summary:
Involves developing, interpreting and implementing financial concepts for financial planning, resource planning (dollars), and control of organizational budget. May analyze and prepare recommendations for financial plans, including annual resource allocations, future requirements, and operating forecasts.

### Generic Scope:
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.

### Custom Scope:
Uses skills as a seasoned, experienced professional with a full understanding of industry practices and organizational policies and procedures; resolves a wide range of issues in imaginative as well as practical ways. Works on problems of diverse scope where analysis of data requires evaluation of identifiable factors. Demonstrates good judgment in selecting methods and techniques for obtaining solutions. Cultivates internal and some external contacts.

### Key Responsibilities:
Applies professional concepts to perform moderate to complex analysis to understand past performance and determine present and future performance and/or resource allocations. Provides analytical support for complex budget, financial, or resource analysis projects. Provides department support in the areas of business process analysis and design, system or procedure testing and implementation, documentation, security, workflow, and customer feedback. Coordinates and implements department budget allocations, conceives of and maintains department chart of accounts or other data management tools, and related business processes. Gathers, analyzes, prepares and summarizes recommendations for financial and/or resource plans, including annual resource allocation approaches, trended future requirements, operating forecasts, sources and uses, et cetera. Performs complex financial or resource research and studies for a variety of internal department constituents. Examples include generating, modifying, and conceiving of new financial or other resource reports, or analyzing and forecasting staff/faculty salary budgets, contracts, grants, gifts, endowments, or user fees.

### Knowledge Skills:
Has thorough knowledge of finance policies, practices and systems. Has ability to independently gather, organize, and perform financial analysis assignments. Requires ability to present information in a clear and concise manner both in writing and verbally. Must be proficient in use of Microsoft Office and common desktop/web applications.
MAPPING PARTNER

DISCUSSION

Role & Responsibility, Resources and Tips
## Career Tracks Milestones

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preliminary Mapping</td>
<td>Employees preliminarily mapped to new Career Tracks job family/function/level prior to the mapping spreadsheets being sent to the departments for review, based on current position description on file.</td>
</tr>
<tr>
<td>Round 1 Mapping</td>
<td>Encompasses both the departmental review of the mapping spreadsheets and their recommendations for changes; as well as the follow up review by project team. This round focused on review of current job duties to find best match in new structure.</td>
</tr>
<tr>
<td>Round 2 Mapping</td>
<td>Reflects approved input from Round 1. Encompasses both the departmental review of the mapping spreadsheets and their recommendations for changes; as well as the follow up review by project team. This round will include assigned grades/salary ranges.</td>
</tr>
<tr>
<td>Announce Career Tracks</td>
<td>Notification letters will be distributed to Employee’s Supervisor for communication to Employee.</td>
</tr>
<tr>
<td>Job Titles</td>
<td></td>
</tr>
<tr>
<td>GO LIVE!</td>
<td>Date of the new classifications that will be effective in HR systems.</td>
</tr>
<tr>
<td>Reconsideration</td>
<td>Timeframe a supervisor can submit additional documentation in support of a different classification than was mapped. Review is completed in the month following the Reconsideration Period.</td>
</tr>
</tbody>
</table>
Career Tracks Project Timeline

Pre-Implementation
Dec – May

Round 1 Mapping
June – July
Manager reviews mapping and submits 1st round change requests
Project Team reviews change requests

Round 2 Mapping
Oct – Dec
Manager reviews mapping and submits final change requests
Project Team reviews change requests

Final Mapping, Reports and Letters
Jan 2017

Reconsideration
Feb – Mar

GO LIVE
February 2017
# Career Tracks Roles

<table>
<thead>
<tr>
<th>Office of the President</th>
<th>Project Lead Mapping Partners</th>
<th>Supervisors &amp; Managers</th>
<th>Career Tracks Advisory Committee</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Develop and provide job standards with assistance from SMEs.</td>
<td>• Serve as Campus SME on Career Tracks.</td>
<td>• Serve as subject matter expert regarding employee job duties and job mapping</td>
<td>• Validate and provide input on Career Tracks project plan and process</td>
</tr>
<tr>
<td>• Provide change management tools: i.e. communication templates.</td>
<td>• Implement &amp; maintain project plan for Campus.</td>
<td>• Distribution of project-specific communications and updates</td>
<td>• Help communicate decisions and rationale to constituents</td>
</tr>
<tr>
<td>• Preliminary JD mapping and identification of staff within a particular job family, function and level.</td>
<td>• Serve as a liaison between Campus &amp; Med Center &amp; OP.</td>
<td>• Partnership with Champion for resolution or discussion of specific questions</td>
<td>• Provide ongoing feedback to project team</td>
</tr>
<tr>
<td></td>
<td>• Lead communication efforts for Campus.</td>
<td>• Ensure the department meets project deadlines</td>
<td></td>
</tr>
</tbody>
</table>
Coming Soon: Mapping Resources

• Mapping Partner Resource Guide
• Job Description Best Practices
• Mapping Revision Request Form
• Mapping Addition/Deletion Request Form
• Directory of Mapping Partners by organizational unit
• Job function summaries
• Mapping Partner PowerPoint (this presentation)
• Sample emails to communicate internally within the unit

Round 1 Process and Timing

- **May 12 – May 16**  
  - Manager’s mapping training
- **June 1, 2016**  
  - Mapping resources/worksheets made available to mapping partners
- **June 1 – June 27, 2016**  
  - Departmental review of all mapping recommendations
- **June 27, 2016**  
  - Round 1 input due back to Career Tracks Project Lead
  - This concludes Round 1 Mapping
Round 1 Input Due June 27

• Request to Add and/or Delete Employees
  • 1 per Primary Mapping Partner

• Request for Mapping Revision
  • 1 per Primary Mapping Partner

• Updated Job Descriptions
  • For each (group) of employee(s) appearing on Request for Mapping Revision
  • Templates strongly encouraged, not required. An existing position description on file can be submitted for an employee request in lieu of a Career Tracks position description, if it is more current/accurate than version used for preliminary mapping.

• All submissions sent to:
Internal Deadline Planning

• How large is your unit?
• What level of departmental leadership review is needed?
  • Sensitive job families, functions, levels, or individual employees within unit
• Competing priorities for your unit(s)
• At what interval(s) does it make sense to follow-up with supervisors/managers
Open Discussion Topics

• What challenges do you foresee in your unit(s)?
• Are there units that are similar to yours that you or your supervisors/managers may want to collaborate with?
• Other thoughts from the team?
Questions