**Annex 3.1. Establishing a Position**

**THE URBAN INSTITUTE**

Human Resources Office Project No.:

**REQUEST FOR POSITION/JOB SPECIFICATIONS FORM**

Instructions: To be completed by hiring supervisor and returned to the HR Office.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Center/Office: | | | Supervisor: | |
| Position Title: | | | Budgeted Salary Range: | |
| **Employment Status:** Regular Intermittent Temporary Expatriate | **Schedule**:  Full-time  Part-time ( \_%) Casual ( hrs/wk) | | | **Location:**  On-site  Off-site: Site name |
| Length of Assignment (if term): | | Desired Start Date: | | |

**Recruitment suggestions**:

**Brief summary of job responsibilities**:

**SIGNATURES**:

|  |  |
| --- | --- |
| Hiring Supervisor  Date | Center/Office Director  Date |
| Director of Human Resources  Date : | Senior vice President  Date |
| **Approval:**  Position authorized  Disapproved (state reason) | |

**Qualifications**: Indicate relative importance by ranking each factor on a scale of 1 to 4. (1= most important).

|  |  |
| --- | --- |
| **EDUCATION**  Rank:  Rank: | Degree level preferred: |
| Degree field(s) preferred: |
| Specialized training: |

|  |  |
| --- | --- |
| **EXPERIENCE**  Rank: | Type of work: |
| Accomplishments: |
| Past working environment (academic, nonprofit, government, etc.): |

|  |  |
| --- | --- |
| **SKILLS**  Rank: | Describe the kinds of skills the ideal candidate should possess: |
| **OTHER QUALITY DESIRED**  Rank: | List the special attributes necessary for successful job performance, e.g., maturity, judgment, creativity, organizational skills, leadership ability, self-motivation, the ability to work independently and as part of a team, etc.: |

Policy and Procedure No. **101**

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**THE URBAN INSTITUTE** Date: **2/28/03**

***Personnel Policies and Procedures***

**Subject: ESTABLISHING A POSITION**

**POLICY**

Prior to hiring an employee, a position must first be established and a salary range and grade assigned based on the specifications of the job to be performed. In addition, a determination must be made about the expected duration of the position, the work schedule, and the status of the position with respect to the Fair Labor Standards Act (FLSA).

Eligibility for participation in the Institute's employee benefits programs is determined in part by employment status. Attachment A summarizes benefits eligibility by employment status. For complete benefits information and eligibility requirements, refer to the appropriate summary plan description or the Urban Institute policy and procedure for each benefit.

**EMPLOYMENT STATUS DESCRIPTIONS**

Positions may be classified as regular, intermittent, temporary, intermittent fellow, or expatriate according to the definitions listed below:

**"Regular"** means a position of indefinite duration or one with a set term of employment of more than 1000 hours and having a regular, predictable, full- or part-time work schedule as described below. Most Institute positions are regular status. Regular positions bear full fringe, overhead and G&A burdens for pricing and billing purposes.

**"Temporary"** means a position authorized for fewer than 1000 hours during any twelve-month period. Temporary employees may not work for the Institute in any other employment status for a period of eight months from the date last worked as a temporary employee (creating, in effect, an eight-month cooling off period after a temporary assignment). Similarly, a regular employee may not be rehired or converted to temporary status unless eight months has elapsed since the last day of employment as a regular employee. A temporary position may have a full-time, part-time, or casual work schedule. Temporary positions bear statutory fringe and full G&A, but no overhead for pricing and billing purposes.

**"Intermittent"** means a position (like a temporary position) that is of indefinite duration and has a casual work schedule and is a position authorized for fewer than 1000 hours in a calendar year. It is, however, used only when a regular employee is rehired or converts to a casual work schedule before the eight-month cooling off period has elapsed or as an alternative to temporary status when the employing center or office wishes to consider the employee for regular employment following the assignment. Intermittent positions bear full fringe, overhead and G&A burdens for pricing and billing purposes.

**"Intermittent Fellow"** means a position that is of indefinite duration and is authorized for greater than 1000 hours in a calendar year. It is used only at the discretion of the president. Intermittent fellow positions bear statutory fringe, plus full overhead and G&A burdens for pricing and billing purposes.

**"Expatriate"** means a position whose duty post is outside the U.S., whose assignment outside the U.S. is anticipated to last 6 months or longer, and whose direct labor costs are covered primarily by a contract/grant to UI by an outside funding source. Expatriate positions bear full fringe, overhead, and G&A for pricing and billing purposes.

**WORK SCHEDULE DESCRIPTIONS**

**"Full-time"** means a regular, predictable work schedule of 40 hours per week.

**"Part-time"** means a regular, predictable work schedule of at least 20 but fewer than 40 hours per week.

**"Casual"** means a work schedule on average of fewer than 20 hours per week or one that averages fewer than 20 hours per week over the duration of the assignment.

**PROCEDURES**

Obtaining Authorization for a Position

To establish a new position, replace a terminating employee in an existing position, or hire a temporary employee, the hiring supervisor completes a **Request for Position/Job Specifications** **Form** (Attachment B) available from the human resources office. The form requires the hiring supervisor to specify the budgeted salary range, on-site or off-site status, employment status, supervisor, desired starting date, and whether the position has supervisory responsibilities. The hiring supervisor also describes the position's major responsibilities and duties and the qualifications and skills required to perform the job successfully, and makes recruitment suggestions for attracting qualified applicants. The center or office director must sign and approve the request.

The completed form is forwarded to the director of human resources, who reviews the job specifications and classifies the position according to the Institute's job evaluation procedures (see Urban Institute Policy and Procedure No. 108 - Salary Administration). Once classified, requests for new positions are sent to the senior vice president for approval. The director of human resources approves requests for replacement positions, notifies the supervisor when new and replacement positions are approved, and maintains a log of approved positions.

Temporary assignments allow researchers to fill short-term hiring needs quickly and cost-effectively. As is the policy for all job offers, offers of employment regardless of employment status may be extended only through the human resources office.

Publicizing Vacant Positions

All vacant regular positions, with the exception of senior fellow, will be posted internally in common areas and sent to appropriate external sources, except in cases where employees are promoted or transferred within the same center or office, or where a written request for a waiver of the job posting requirement has been approved by the senior vice president. Senior fellows serve at the invitation of the Institute's president and are selected based on their nationally recognized expertise in a specific field of study.

Exempt positions will be posted for a minimum of two weeks, non-exempt positions for a minimum of one week. Temporary and intermittent positions are not required to be posted.

Canceling a Vacant Position

A posted exempt position that remains vacant for longer than six months will be canceled unless the hiring supervisor makes a written request to the director of human resources that the position remain open for an additional three months.

A posted non-exempt position that remains vacant for longer than three months will be canceled unless the hiring supervisor makes a written request to the director of human resources that the position remain open for an additional three months.