

# Human Resources

## Classification & Evaluation Manual

*This manual is intended as guide only to the classification and evaluation processes applying at Monash University. It is subject to update and review and may be altered without notification.*

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## Chapter 1

### Monash University Classification System and Processes for General Staff Positions HEW Levels 1 to 10

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## 1. The Classification Manual

This Classification Manual will be your guide to the steps involved in the classification processing of general staff positions for HEW levels 1 through to 10 (**excepting HEW 10 level positions on Performance Based Contracts (PBC's) as provided for in Clause 17 of the Monash Enterprise Agreement 2005**) and in the process of classifying and evaluating general staff positions levels 1 to 7. It will also provide guidance in how to classify positions for HEW levels 1 to 7 using the position classification descriptors and additional material.

The Manual describes Monash University's simplified position description format, and provides direction in writing position descriptions (including OHS&E and equity protocols).

It also describes the purpose of the Classification Proposal form used to apply for the classification of currently occupied and new or vacant positions and provides guidance in completing the form.

You will find the later chapters cover the classification review and appeals process; as well as describing the general framework of delegated authorities in the position classification process and the monitoring and auditing processes.

### 1.1 About the HEW Classification Structure

Monash University general staff are classified in accordance with the 10 level HEW structure, with all positions classified according to the General Staff Classification Descriptors (**excepting HEW 10 level positions on PBC's**).

### 1.2 About the Classification Process

The classification process is broadly outlined in Clause 64 of the [Monash University Enterprise Agreement \(Academic and General Staff\) 2005](#). The process uses position classification descriptors and additional material that can be found in the Manual. This includes worked examples of position descriptions and additional comments for each Descriptor.

It is critical that all position evaluators understand that the position classification descriptors will always prevail in the classification of general staff positions if there is a dispute or inconsistency with any of the support material provided.

Reference may also be made to Trades positions throughout the manual, in such instances where reference is made to the "Enterprise Agreement" in relation to trades positions, this will generally mean, as appropriate, a reference to either the:

- [Monash University Enterprise Agreement \(Trades and Services staff - Building and Metal Trades staff and Grounds and Gardening staff\) 2005](#); or
- [Monash University Enterprise Agreement \(Trades and Services staff - Catering and Retail, Cleaning and Caretaking, and Miscellaneous services staff\) 2005](#)

## 2. Review of Classification Decisions

Staff members aggrieved by classification decisions made in relation to their positions have the right to apply for review under Clause 67 of the Enterprise Agreement. **Details on the process and lodgement forms are contained in Chapter 8, page 39 of this Manual.**

## Chapter 2

### Steps in Evaluating and Classifying Hew 1 to 7 Level Positions – Currently Occupied & New or Vacant

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#### Introduction:

The following tables provide step-by-step procedures for the process of classifying general staff positions at the HEW 1 to 7 levels.

The delegated power for processing and classifying HEW 1 to 7 level positions rests with the nominated delegates within each Faculty and Division.

Sections 65 and 66 of the Monash University Enterprise Agreement 2005 identify a range of circumstances which may lead to a position being reviewed and potentially reclassified. These include changes to the requirements of the position and job redesign.

These provisions also provide some of the basic framework for the processes detailed in this Classification and Evaluation Manual.

The Enterprise Agreement 2005 also contains classification descriptors which provide the criteria for the establishment of new positions at various grade levels.

Faculties and Administrative Units are responsible for establishing local operational frameworks for the processing of classification requests, the recording and reporting of classification decision-making and for establishing Evaluation and Classification Committees.

Further chapters in this Manual provide information on the documentation requirements (see [Chapters 6 and 7](#)) and the constitution of Evaluation and Classification Committees (see [Chapter 10](#)).

## Steps in Evaluating and Classifying Hew 1 to 7 Level Positions – Currently Occupied

<i>Step</i>	<i>Description</i>	<i>Who</i>
1 Position Changes	<ul style="list-style-type: none"> <li>In order to be eligible for re-evaluation of classification, an occupied position must have undergone changes ‘involving a significant degree of increased responsibility or job complexity’ (See Sections 65 &amp; 66 of the Enterprise Agreement 2005))</li> <li>This can be via: deliberate job redesign; organisational restructure; major, new functions acquired etc</li> <li>Changes are assessed from last ‘effective date’ of authorised position description</li> </ul>	<ul style="list-style-type: none"> <li>Generally the staff member and the supervisor will be aware of the nature and extent of the changes</li> <li>The re-evaluation of a position’s classification level can be supervisor and/or staff initiated but must be processed through the supervisor</li> </ul>
2 New PD Written	<ul style="list-style-type: none"> <li>The new requirements of the position must be written into a new position description</li> </ul>	<ul style="list-style-type: none"> <li>Staff member, or supervisor, or both in consultation</li> </ul>
3 New PD Approved	<ul style="list-style-type: none"> <li>The new PD must be signed by both the staff member and the manager as an accurate representation of the position as it is now, approved by the supervisor and other delegated authorities in the Faculty/ Administrative Unit</li> </ul>	<ul style="list-style-type: none"> <li>Staff member, supervisor, and delegated authorities</li> </ul>
4 Classification Proposal Completed and Approved	<ul style="list-style-type: none"> <li>An application for re-classification of the position must be made on the Classification Proposal form (see Chapter 7).</li> <li>The form describes the changes that have occurred – both generally, and specifically in terms of the relevant grade level/s General Staff Classification Descriptors</li> <li>This step can be undertaken at the same time as the writing and approval of the new PD</li> </ul>	<ul style="list-style-type: none"> <li>Completed by staff member, or supervisor, or both in consultation</li> <li>Approved by staff member, supervisor and delegated authority</li> </ul>

### Steps in Evaluating and Classifying Hew 1 to 7 Level Positions – Currently Occupied (continued)

Step	Description	Who
5 Position Evaluation*	<ul style="list-style-type: none"> <li>• Classification Proposal, <i>new PD and old PD and relevant organisational chart</i> sent to the Classification Committee Coordinator for the Faculty/Administrative Unit</li> <li>• The classification of the position is determined by the Classification Committee using the General Staff Classification Descriptors, with additional assistance from the material provided in this manual if required</li> <li>• If applicable, a new classification is recommended by the Classification Committee for the Faculty/Administrative Unit</li> </ul>	<ul style="list-style-type: none"> <li>• Material sent to Classification Committee Coordinator by supervisor and/or appropriate delegated authority</li> <li>• Classification Committee reviews position classification</li> </ul>
6 Position Classification	<ul style="list-style-type: none"> <li>• The Classification Committee Coordinator for the Faculty/Administrative Unit sends the recommendation to the authorised delegate for classification of positions for the Faculty/Administrative Unit</li> <li>• The Dean/Divisional Director confirms and approves the classification using the Advice of Classification form - <a href="http://www.adm.monash.edu.au/human-resources/forms/classificatiob-advice.pdf">http://www.adm.monash.edu.au/human-resources/forms/classificatiob-advice.pdf</a> and the Classification Committee Coordinator notifies the supervisor formally of the evaluation outcome</li> <li>• The Classification Committee Coordinator notifies the staff member, supervisor and other relevant people of the new classification by memo.</li> <li>• The Classification Committee Coordinator ensures appropriate records are kept</li> </ul>	<ul style="list-style-type: none"> <li>• Classification Committee Coordinator sends recommended classification for decision</li> <li>• Dean/ Divisional Director for classification of positions in the Faculty/Unit makes the decision and classifies the position</li> </ul>
7 Review of Classification Decision	<ul style="list-style-type: none"> <li>• Please refer to Chapter 8 for details on seeking a review of classification decisions.</li> </ul>	

There will be instances where the proposed reclassification will not receive approval from the Classification Committee, however, an indication of sufficient development or progress in the complexity of the role may result in the Classification Committee recommending an accelerated increment for the incumbent. In this event, the Classification Committee Coordinator will advise the relevant department supervisor of this recommendation.

### Steps in Evaluating and Classifying Hew 1 to 7 Level Positions – New or Vacant

<i>Step</i>	<i>Description</i>	<i>Who</i>
1 New Position Required, or Vacant Position Changes/ Needs Review	<ul style="list-style-type: none"> <li>The supervisor and/or relevant Faculty or Administrative Unit manager recognises the need for a new position, or the need to redesign a vacant, existing position</li> <li>If position already exists, changes are assessed from the last 'effective date' of authorised position description</li> </ul>	<ul style="list-style-type: none"> <li>Supervisor and/or relevant Faculty or Administrative Unit manager</li> </ul>
2 New PD Written	<ul style="list-style-type: none"> <li>The requirements of the new position, or the new requirements of the existing vacant position must be written into a new position description</li> </ul>	<ul style="list-style-type: none"> <li>Supervisor and/or relevant Faculty or Administrative Unit manager</li> </ul>
3 New PD Approved	<ul style="list-style-type: none"> <li>The new PD must be approved by the supervisor and other delegated authorities in the Faculty/Administrative Unit before it is submitted for Classification and Evaluation</li> </ul>	<ul style="list-style-type: none"> <li>Supervisor and delegated authorities</li> </ul>
4 Classification Proposal Completed and Approved	<ul style="list-style-type: none"> <li>An application for classification of the new position, or review of the classification of the existing vacant position must be made on the Classification Proposal form (see Chapter 7 of this manual)</li> <li>The form describes the requirements of the new position, or the changes that have occurred in the existing, vacant position – both generally and specifically in terms of the relevant grade level/s General Staff Classification Descriptors</li> <li>This step can be undertaken at the same time as the writing and approval of the new PD</li> </ul>	<ul style="list-style-type: none"> <li>Completed by supervisor</li> <li>Approved by supervisor and delegated authority</li> </ul>

### Steps in Evaluating and Classifying Hew 1 to 7 Level Positions – New or Vacant (continued)

<i>Step</i>	<i>Description</i>	<i>Who</i>
5 Position Evaluation	<ul style="list-style-type: none"> <li>• Classification Proposal, new PD and old PD (if relevant) and relevant organisational chart sent to the Classification Committee Coordinator for the Faculty/Administrative Unit</li> <li>• The classification of the position is determined by the Classification Committee using the General Staff Classification Descriptors, with additional assistance from the material provided in this manual if required</li> <li>• An initial classification, or if applicable, a new classification for an existing vacant position, is recommended by the authorised Position Evaluation Authority for the Faculty/Administrative Unit</li> </ul>	<ul style="list-style-type: none"> <li>• Material sent to the Classification Committee Coordinator by supervisor and/or appropriate delegated authority</li> <li>• Classification Committee reviews position classification</li> </ul>
6 Position Classification	<ul style="list-style-type: none"> <li>• The authorised Position Evaluation Authority for the Faculty/Administrative Unit sends the recommendation to the authorised delegate for classification of positions for the Faculty/Administrative Unit</li> <li>• The authorised delegate confirms and approves the classification using the Advice of Classification Form</li> <li>• The authorised delegate formally notifies the supervisor and other relevant people of the initial or new classification and ensures they have copies of the new PD and classification decision</li> <li>• The authorised delegate ensures appropriate records are kept</li> </ul>	<ul style="list-style-type: none"> <li>• Classification Committee Coordinator sends recommended classification for decision</li> <li>• Authorised delegate for classification of positions in the Faculty/Unit makes the decision and classifies the position</li> </ul>

## Chapter 3

### Steps in Evaluating and Classifying HEW Level 8 & 9 Positions – Currently Occupied and New or Vacant

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#### Introduction:

The following tables provide step-by-step procedures for the process of classifying general staff positions at the HEW 8 and 9 levels.

The delegated power for processing and classifying HEW 8 and 9 level positions rests with the nominated delegates within Human Resources Division.

Human Resources Division is responsible for establishing operational frameworks for the processing of classification requests at this level from faculties and administrative units, the recording and reporting of classification decision-making and for constituting Evaluation and Classification Committees to review proposal and position documentation and determine classification outcomes.

Centrally based Evaluation and Classification Committees are constituted along the same basic principles as those espoused for Faculty Based Committee Structures (see Chapter 10 of this Manual).

Sections 65 and 66 of the Monash University Enterprise Agreement 2005 identify a range of circumstances which may lead to a position being reviewed and potentially reclassified. These include changes to the requirements of a position and job redesign.

These provisions also provide some of the basic framework for the processes detailed in this classification and evaluation manual.

Further Chapters in this Manual provide information on the documentation requirements (see [Chapters 6 and 7](#)).

### Steps in Evaluating and Classifying HEW Level 8 & 9 Positions – Currently Occupied

<i>Step</i>	<i>Description</i>	<i>Who</i>
1 Position Changes	<ul style="list-style-type: none"> <li>In order to be eligible for re-evaluation of classification level, an occupied position must have undergone changes 'involving a significant degree of increased responsibility or job complexity (<i>EA Clause 65</i>)</li> <li>This can be via: deliberate job redesign (<i>EA Clause 66</i>); organisational restructure; major, new functions acquired etc</li> <li>Changes are assessed from the last 'effective date' of authorised position description</li> </ul>	<ul style="list-style-type: none"> <li>Generally the staff member and the supervisor will be aware of the nature and extent of the changes</li> <li>The re-evaluation of a position's classification level can be supervisor and/or staff initiated but must be processed through the relevant supervisor</li> </ul>
2 New PD Written	<ul style="list-style-type: none"> <li>The new requirements of the position must be written into a new position description</li> </ul>	<ul style="list-style-type: none"> <li>Staff member, or supervisor, or both in consultation</li> </ul>
3 New PD Approved	<ul style="list-style-type: none"> <li>The new PD must be signed by the staff member, the supervisor and the Dean/Divisional Director as an accurate representation of the position as it is now</li> </ul>	<ul style="list-style-type: none"> <li>Staff member, supervisor, and Dean/Divisional Director</li> </ul>
4 Classification Proposal Completed and Approved	<ul style="list-style-type: none"> <li>An application for re-classification of the position must be made on the Classification Proposal form (see Chapter 6).</li> <li>The form describes the changes that have occurred – both generally, and specifically in terms of the relevant grade level/s General Staff Classification Descriptors and need to clearly describe how the position operated both before and after the changes.</li> <li>This step can be undertaken at the same time as the writing and approval of the new PD</li> </ul>	<ul style="list-style-type: none"> <li>Completed by staff member, or supervisor, or both in consultation</li> <li>Form signed by staff member, supervisor and Dean/Divisional Director</li> </ul>

### Steps in Evaluating and Classifying HEW Level 8 & 9 Positions – Currently Occupied (continued)

Step	Description	Who
5 Position Evaluation*	<ul style="list-style-type: none"> <li>• Classification Proposal, both the <i>new PD and the old PD</i> and relevant organisational chart are sent to the Classification Committee Coordinator in HR Operations</li> <li>• The classification of the position is determined by the Classification Committee, constituted by HR Operations, using the General Staff Classification Descriptors, with additional assistance from the material provided in this manual if required</li> <li>• The classification evaluation process may result in the proposed re-classification being approved or not approved</li> <li>• The decision of the Classification Committee is confirmed/approved by the Chair of the Classification Committee</li> </ul>	<ul style="list-style-type: none"> <li>• Material sent to Classification Committee Coordinator by supervisor and/or appropriate senior manager</li> <li>• Classification Committee evaluates position classification</li> <li>• Classification Committee Chair confirms the evaluation outcome</li> </ul>
6 Position Classification	<ul style="list-style-type: none"> <li>• The Classification Committee Coordinator formally advises the relevant Department/ Administrative Unit of the evaluation outcome</li> <li>• Commencing salary will normally be at the minimum of the new grade unless the Department deems that there is sufficient reason for the incumbent to commence at a different point within the new classification</li> <li>• The staff member and other relevant people are advised of the new classification by memo</li> <li>• The staff member and other relevant people advised of review processes should the proposed reclassification not be approved</li> <li>• The HR Operations Classification Committee Coordinator ensures appropriate records are kept</li> </ul>	<ul style="list-style-type: none"> <li>• Classification Committee Coordinator advises Department of the decision</li> <li>• Supervisor advises HR Advisor of new salary point and effective date</li> <li>• Supervisor provides advice to staff member and other relevant people</li> </ul>
7 Review of Classification Decision	<ul style="list-style-type: none"> <li>• Please refer to Chapter 8 for details on seeking a review of classification decisions.</li> </ul>	

There will be instances where the proposed reclassification will not receive approval from the Classification Committee, however, an indication of sufficient development or progress in the complexity of the role may result in the Classification Committee recommending an accelerated increment for the incumbent. In this event, the Classification Committee Coordinator will advise the relevant department supervisor of this recommendation.

### Steps in Evaluating and Classifying HEW 8 & 9 Level Positions – New or Vacant

<i>Step</i>	<i>Description</i>	<i>Who</i>
1 New Position Required, or Vacant Position Changes/ Needs Reviewing	<ul style="list-style-type: none"> <li>The supervisor and/or relevant Faculty or Administrative Unit manager recognises the need for a new position, or the need to redesign/review a vacant, existing position</li> <li>If position already exists, changes are assessed from the last 'effective date' of authorised position description</li> </ul>	<ul style="list-style-type: none"> <li>Supervisor and/or relevant Faculty or Administrative Unit manager</li> </ul>
2 New PD Written	<ul style="list-style-type: none"> <li>The requirements of the new position, or the new requirements of the existing vacant position must be written into a new position description</li> </ul>	<ul style="list-style-type: none"> <li>Supervisor and/or relevant Faculty or Administrative Unit manager</li> </ul>
3 New PD Approved	<ul style="list-style-type: none"> <li>The new PD must be approved by the supervisor and relevant senior departmental/divisional head/s</li> </ul>	<ul style="list-style-type: none"> <li>Supervisor and Dean/ Divisional Director</li> </ul>
4 Classification Proposal Completed and Approved	<ul style="list-style-type: none"> <li>An application for classification of the new position, or review of the classification of the existing vacant position must be made on the Classification Proposal form (see Chapter 7 of this manual)</li> <li>The form describes the requirements of the new position, or the changes that have occurred in the existing, vacant position – both generally and specifically in terms of the relevant grade level/s General Staff Classification Descriptors and need to clearly describe the new requirements or how the existing, vacant position operated both before and after the changes</li> <li>This step can be undertaken at the same time as the writing and approval of the new PD</li> </ul>	<ul style="list-style-type: none"> <li>Completed by supervisor</li> <li>Form signed by supervisor and Dean/ Divisional Director</li> </ul>

### Steps in Evaluating and Classifying HEW 8 & 9 Level Positions – New or Vacant (continued)

<i>Step</i>	<i>Description</i>	<i>Who</i>
5 Position Evaluation	<ul style="list-style-type: none"> <li>• Classification Proposal, <i>new PD and old PD</i> (if relevant) and relevant organisational chart are sent to the Classification Committee Coordinator in HR Operations</li> <li>• The classification of the position is determined by the Classification Committee, constituted by HR Operations, using the General Staff Classification Descriptors, with additional assistance from the material provided in this manual if required</li> <li>• The proposed classification, or if applicable, a new classification for an existing vacant position, is approved and confirmed by the Classification Committee Chair</li> </ul>	<ul style="list-style-type: none"> <li>• Material sent to the Classification Committee Coordinator by supervisor and/or appropriate senior manager</li> <li>• Classification Committee reviews or determines the position classification</li> <li>• Classification Committee Chair confirms the evaluation outcome</li> </ul>
6 Position Classification	<ul style="list-style-type: none"> <li>• The Classification Committee Coordinator formally advises the relevant Department/ Administrative Unit of the evaluation outcome.</li> <li>• If the new/vacant position is to be advertised, the relevant Department forwards a completed Request to Advertise form to HR Operations by Friday 11.00am</li> <li>• HR Operations processes the advertising request</li> <li>• The HR Operations Classification Committee Coordinator ensures appropriate records are kept</li> </ul>	<ul style="list-style-type: none"> <li>• Classification Committee Coordinator advises Department of the decision</li> <li>• Supervisor advises HR Advisor of the need to advertise the position</li> <li>• Supervisor provides advice to relevant people regarding the outcomes of the proposal</li> </ul>

## Chapter 4

### Steps in Evaluating and Classifying HEW 10 Level Positions – Currently Occupied and New or Vacant

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#### Introduction:

HEW 10 level positions on Performance Based Contracts (PBC's - Please refer to provisions under Clause 17 of the Enterprise Agreement 2005) are currently processed within the HR Operations Branch of the Human Resources Division.

Once Faculties/Divisions have assessed that an existing position has undergone significant change or circumstances dictate the creation of a new position at a senior level; they need to ensure that a new position description (PD) is developed and that the new PD is signed by the relevant parties including the incumbent in the case of an existing, occupied position.

The authority to reclassify positions at this level rests with The Level 10 Classification Committee.

The Level 10 Classification Committee comprises senior staff across the University. Committee membership is static and ensures consistency of classification decision-making as well as the maintenance of key relativities.

Proposals for classification or reclassification to HEW 10 level should be forwarded to:

The Secretary,  
Level 10 Classification Committee,  
HR Operations, 710 Blackburn Road, Clayton

Classification documentation received from the Faculty/Division should include:

- Covering Submission
- New position description
- Old position description (where relevant)
- Organisational Chart
- Number of direct and indirect reports
- Financial delegation or budget responsibility

Responsibility for the preparation of all this documentation rests with the relevant faculty/business unit. The local HR/Resources Manager and/or central HR Operations staff are key resources in providing staff and managers with advice and information regarding the preparation of this documentation.

HR Operations will then forward the package of documentation, including a covering submission prepared by HR Operations and containing an analysis of the material, a preliminary assessment of relativities as well as a recommendation regarding the classification level of the position is sent to the Level 10 Classification Committee for their consideration and determination.

The confirmation of the classification level of a position at this level is subject to the acceptance of a fixed term, performance based contract by the incumbent.

Please note that it is good management practice to review the position documentation for all positions on a regular basis. Reviewing the position documentation when a position becomes vacant or as part of the annual performance management cycle ensures that:

- The role expectations are still current and valid,

- Informs the preparation of performance management criteria and,
- May highlight the need to review the classification level of a job should significant changes have occurred.

## Chapter 5

### How to Classify Positions Using Position Classification Descriptors – General Staff and Additional Material

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#### Introduction:

The Monash University career structure and associated classification principles and processes are based on a 10 grade level classification descriptor system called the Higher Education Worker (HEW) – General Staff Classification Descriptors.

In accordance with Section 64.1 of the Enterprise Agreement 2005, all positions are classified according to the General Staff Classification Descriptors (excepting HEW 10 level positions on Performance Based Contracts). These descriptors comprise 7 dimensions with each dimension containing criteria for how HEW positions are expected to operate at the various grade levels.

This chapter includes:

- The basic classification business rule applying to the classification system as it operates within the Monash University context,
- Some basic classification principles which underpin the classification process,
- Guiding Notes on the various Descriptor Dimensions, including lists of helpful questions which may prove useful during the evaluation process and,
- Classification evaluation tools.

Key attachments to this Chapter include definitions for the various dimensions, defining statements regarding the supervisory categories contained within the descriptors and an understanding of the qualification levels and requirements found within the descriptors.

Also attached (as a separate document) are the General Staff Classification Descriptors containing the actual descriptors as provided for under the Enterprise Agreement 2005 as well as supplementary information developed to assist in the classification process. **However, please note that this supplementary information is provided as additional points of reference to be used as a guide only.**

The descriptors have been presented in a table format for ease of reading and ease of comparison between various grade levels.

## 5.1 General Classification Business Rule/s:

As a general guideline, occupied positions evaluated by a Classification Committee would normally only be reclassified up one level.

If a position is evaluated at more than one level above the current grading, there is a strong indication that the position has not retained sufficient elements of the original duties and therefore is construed as being a new position. In such cases and in the absence of exceptional circumstances justified by written documentation, the position is to be advertised in the normal manner.

These guidelines apply to ensure that the University has regard to the principles of equitable treatment of appointment in accordance with the established University equity and recruitment procedures and policies.

Business Rule/s may change from time to time. New ones may be added and others deleted.

## 5.2 Basic Classification Principles:

The General Staff Classification Descriptors are used to determine the classification level of general staff positions. The key provision underpinning this classification process is to be found in Section 64.1 of the Enterprise Agreement 2005 which states that; "Positions will be classified at the level which **most accurately** reflects the work required to be performed, taking into account the duties and responsibilities of the position".

Therefore, the classification of any position is based on the criteria within the dimensions which most closely align to a particular HEW grade level.

Some of the key issues encountered regularly by classification evaluators include:

### 5.2.1 Weighting of Classification Dimensions:

While the classification descriptors contain 7 dimensions, not all of these dimensions impact equally on the classification of the position. The Training Level/Qualifications dimension must align to the grade level sought for any position. This is one dimension which needs to be strictly applied.

The Occupational Equivalent and the Typical Activities dimensions, however, provide helpful information which is descriptive but not necessarily critical to the classification decision-making process.

Apart from the Qualifications dimension, the core dimensions impacting on the classification level of a job are the Level of Supervision, Task Level, Organisational Knowledge and Judgement, Independence and Problem Solving dimensions.

The responsibilities of any job need to align closely with the majority of these dimensions in order to comprehensively determine its classification level.

### 5.2.2 Volume vs Complexity:

The classification descriptors contain increasing levels of responsibilities, complexities and breadth of impact of role functions which are designed to distinguish between the various grade levels.

The key underlying concept is that the complexity of the role and the level of sophistication expected in the operation of that role increase commensurately with each grade level.

However, a significant increase in work volume is often mistaken for an increase in the overall complexity of a role. If the job is undertaking more of the same type of responsibility or activity, then the issue is one of sufficient resourcing for the services provided.

In order to justify the reclassification of a position, the overall complexity of the role needs to have changed significantly.

### **5.2.3 Individual vs Job Role**

The classification process is substantively about the role of the position in the organisation and not the individual who may be occupying that role. The organisation has the responsibility of determining the manner in which a given position will operate having consideration for the broader business objectives of the organisation.

There are times when the occupant may well possess qualifications and/or skills and experience superior or more extensive to those called for in the role. However, unless these qualifications, skills and experiences are fundamental to the level of responsibility of the role, they do not impact on the classification level of that role.

Nevertheless, it is possible for an individual to use these qualifications, skills and knowledge to shape the role to meet the evolving needs of the organisation. In these instances, should the new responsibilities become on-going in nature and management consistently expect the occupant/position to operate at the higher level, it would then be appropriate to review and potentially reclassify the position.

### **5.2.4 Developmental Tasks:**

Most roles will contain elements which can range from routine tasks which are found at the more junior classification levels to more sophisticated elements which can start to creep into a higher classification level. This is quite reasonable so long as the majority of responsibilities closely align to the substantive grade level of the role.

It is also incumbent upon supervisors to provide developmental tasks, opportunities and/or higher duties assignments in order to develop and enhance the individual's basic skill sets and experiences. Some of these tasks can expect a level of operation which is higher than the individual's substantive role. This is appropriate for developmental purposes and to equip the individual with the skills to seek advancement to positions of a higher and more responsible grade level.

However, developmental activities would not be of an on-going nature nor become a core part of the substantive role. Nor should higher duties assignments regardless of the length of the assignment be used as justification for the reclassification of the substantive role if that role has basically remained unchanged.

## **5.3 Descriptor Dimensions:**

As mentioned in the introduction, the General Staff Classification Descriptors include the following definitions which are attached to the end of this chapter for your information:

- Definitions for each of the seven Classification Dimensions (Attachment 1a)
- Definitions for the Supervisory Categories (Attachment 1b)
- Definitions for the Training Level/Qualifications (Attachment 1c)

Additional information on each of the dimensions is also provided below.

### **5.3.1 Training Level or Qualifications:**

The training level, qualifications, experience and skill level expectations are clearly defined in the classification descriptors and need to be articulated unambiguously in accordance with the existing or sought after HEW Grade level of the job.

A position cannot be classified at a particular level unless the Training Level/Qualifications meet the relevant grade criteria for this dimension.

The criteria within the Training Level or Qualifications dimension cover the following areas:

- Qualifications

- Experience,
- Communication Skills
- Organisational Skills

Factors to consider when assessing the Training Level or Qualifications dimension include:

- What formal qualification (if any) is required for the position? This must align with the standards set in the Descriptors for the relevant grade level.
- What type of previous work experience is necessary for the incumbent to perform the role competently?
- What level of planning and organising abilities are required? Is it just the ability to plan and organise their own time or plan and organise for a function (e.g. department or work unit)
- What level of communication skills are required to perform the role competently? Consider verbal, written, negotiation, influencing and interpersonal skills.
- Is the incumbent providing advice – to whom?
  - About what? Is this just an exchange of information or is the incumbent expected to interpret and provide advice (e.g. on policies, processes etc.)
  - Level of understanding and interpretation required?

### **5.3.2 Occupational Equivalent:**

This dimension provides some comparative information but is not critical to the determination of the position's classification level.

### **5.3.3 Level of Supervision:**

This dimension includes two aspects of supervision, the degree to which the incumbent is supervised by their direct manager, and the extent to which the incumbent is responsible for supervising or managing others.

Please refer to the definitions table at Attachment 1(b) which provides detailed information on each of the supervision categories found within the descriptors. Briefly, these are:

- Close Supervision
- Routine Supervision,
- General Direction and
- Broad Direction

Factors to consider when assessing the Task Level dimension include:

- Who is the incumbent reporting to and what is his/her role?
- Is the incumbent working in consultation with the supervisor or under general direction with?
- What is the size, scope and complexity of the work unit?

This is a core dimension and contributes to the determination of the classification level of a position.

### **5.3.4 Task Level:**

This dimension looks at the type, complexity and responsibility of the tasks typically performed by staff within each proposed classification level. There is an overlap between the criteria provided in this dimension and the Supervision Dimension.

Factors to consider when assessing the Task Level dimension include:

- What is the nature of the tasks to be performed and how complex are they? What would be the nature and breadth of impact if the role is not performed competently?
- Are there existing policies, procedures or precedents which guide the work? How creative or innovative does the incumbent need to be?
- What degree of creativity, expert knowledge or specialisation and experience is required to complete tasks?
- Is the incumbent required to develop, redefine or provide input to the development of policies and/or procedures? Are they accountable for policy development?
- Is expert knowledge, skill or experience required? How is this expert knowledge, skill or experience applied and to what responsibilities? Is the incumbent required to provide advice and if so, to whom?

This is a core dimension and contributes to the determination of the classification level of a position.

### **5.3.5 Organisational Knowledge:**

Positions operate within an organisational context with clear reporting lines and accountabilities commensurate with the position's grade level. Sometimes, this context is closely defined by policies, rules and regulations, leaving little room for the position to exercise discretionary power.

However, more senior roles generally need to possess a broader and more in-depth knowledge of the organisation's structures and may need to interpret the policy and operational frameworks of the organisation in the conduct of their duties.

Factors to consider when assessing the Organisational Knowledge dimension include:

- What type of knowledge does the incumbent require in order to perform the role competently?
  - ⇒ Knowledge of the organisation (own department, Division/Faculty, other Divisions/Faculties, wider university)
  - ⇒ Policies, procedures, rules, precedents and guidelines. Are these well established?
  - ⇒ Systems
- Legislation, regulations, GST, Privacy Act, OH&S, FOI or other specialty legislation?
- How is this knowledge applied in the context of the day-to-day responsibilities of the role?
- Is the incumbent required to have input into policy development?

This is a core dimension and contributes to the determination of the classification level of a position.

### **5.3.6 Judgement, Independence and Problem Solving:**

This dimension includes three complementary functions which are critical in determining the level of judgement expected of the position, the level of independence the position has in decision-making processes and the level of responsibility it exercises and how the position is expected to convert the qualifications, experience and skills requirements in order to solve problems,

undertake the duties of the position properly, expand the scope of influence and overall, add more depth and value to the organisation.

There is a considerable overlap between the criteria contained in this dimension and the criteria contained in the Task Level dimension.

Factors to consider when assessing the Judgement, Independence and Problem Solving dimension include:

- Judgement is concerned with the degree of decision-making and initiative required. What type of matters is the incumbent required to apply judgement to and make decisions about?
  - ⇒ Does the incumbent need to provide advice to other parties?
  - ⇒ Is there a requirement to interpret policies?
- How much independence must they exercise when making judgements and problem solving?
- How much problem solving is required in the position? What is the nature and complexity of the problems?
- Is there discretion to innovate and take responsibility for the outcomes?
- Is the incumbent responsible/accountable for the function or is he/she assisting in the delivery of a function?

This is a core dimension and contributes to the determination of the classification level of a position.

### **5.3.7 Typical Activities:**

This dimension describes some of the typical activities undertaken by staff at each grade level and within a variety of different occupations. This information is useful but does not critically impact on the classification grade of the position.

**If more information is required about a position, it is important to then contact the relevant supervisor to obtain a greater understanding of how the position is intended to operate.**

## **5.4 Evaluation Management Tools:**

This section contains some evaluation tools which Faculties/Division may find helpful in the management of various activities in the classification process. These include:

- Evaluation Working Form (Attachment 1d)
- PD Evaluation Cover Sheet (Attachment 1e)
- Evaluation Documentation Checklist (Attachment 1f)

The evaluation working form is used widely by Classification Evaluation Committee Members to record the findings resulting from the evaluation process and provide documentary evidence substantiating the evaluation decision.

In addition, the form provides identifying information regarding the position under review and provision for comments, follow up actions or any recommendations made by the Classification Evaluation Committee which need to be actioned by the relevant Faculty/Division.

It is important to bear in mind that the Training and Qualifications requirements need to strictly align to the requirements articulated in the descriptors for the classification grade level sought. However, if the position is to remain at the current classification level, the Classification Evaluation Committee will accordingly request the Faculty/Division to amend the Training/Qualifications listed to align with the appropriate grade level.

The Occupational Equivalent and Typical Activities descriptors may provide comparative and descriptive information but neither are critical to the classification evaluation decision-making process.

The other 4 descriptors are critical to the evaluation outcome and will form the main basis for the classification decision. Classification Evaluation Committees should ensure that they have documented clear statements regarding where the position sits in the grade structure according to the descriptors.

The PD Evaluation Cover Sheet and Position Description Checklist are example forms which can be used by Faculties/Divisions to help manage their classification evaluation processes. They provide identifying information regarding the position under review and serve as checklists to ensure that all the relevant documentation is contained in the package.

## Monash University: General Staff Classification Dimension Definitions

Dimension	Definition
<b>Training Level</b>	<ul style="list-style-type: none"> <li>• The type and duration of training which the duties of the classification level typically require for effective performance.</li> <li>• Training is the process of acquiring skills and knowledge through formal education, on-the-job instruction or exposure to procedures.</li> </ul>
<b>Task Level</b>	<ul style="list-style-type: none"> <li>• The type, complexity and responsibility of tasks typically performed by staff within each proposed classification level.</li> </ul>
<b>Judgement, Independence and Problem Solving</b>	<ul style="list-style-type: none"> <li>• Judgement is the ability to make sound decisions, recognising the consequences of decisions taken or actions performed.</li> <li>• Independence is the extent to which a staff member is able (or allowed) to work effectively without supervision or direction.</li> <li>• Problem solving is the process defining or selecting the appropriate course of action where alternative courses of action are available.</li> <li>• This dimension looks at how much of each of these three qualities applies at each proposed classification level.</li> </ul>
<b>Level of Supervision</b>	<ul style="list-style-type: none"> <li>• This dimension covers both the way in which staff are supervised or managed and,</li> <li>• The role of staff in supervising or managing others.</li> </ul>
<b>Organisational Knowledge</b>	<ul style="list-style-type: none"> <li>• The level of knowledge and awareness of the organisation, its structure and functions that would be expected of staff at each proposed level and,</li> <li>• The Purposes to which that organisational knowledge may be put.</li> </ul>
<b>Occupational Equivalent</b>	<ul style="list-style-type: none"> <li>• Occupations typically falling within each proposed classification level.</li> </ul>
<b>Typical Activities</b>	<ul style="list-style-type: none"> <li>• Activities typically undertaken by staff in different occupations at each of the proposed classification levels.</li> </ul>

## Monash University: General Staff Classification Descriptors – Definitions for Supervisory Categories

Dimension	Definition
<b>Level of Supervision</b>	<ul style="list-style-type: none"> <li>• <i>This dimension includes two aspects of supervision, the degree to which the incumbent is supervised by their direct manager, and the extent to which the incumbent is responsible for supervising or managing others.</i></li> </ul>
<b>Close Supervision</b>	<ul style="list-style-type: none"> <li>• Clear and detailed instructions are provided.</li> <li>• Tasks are covered by standard procedures.</li> <li>• Deviation from procedures in unfamiliar situations are referred to higher levels.</li> <li>• Work is regularly checked.</li> </ul>
<b>Routine Supervision</b>	<ul style="list-style-type: none"> <li>• Direction is provided on tasks to be undertaken with some latitude to rearrange sequences and discriminate between established methods.</li> <li>• Guidance on the approach to standard circumstances is provided in procedures.</li> <li>• Guidance on the approach to non-standard circumstances is provided by a supervisor.</li> <li>• Checking is selective rather than constant.</li> </ul>
<b>General Direction</b>	<ul style="list-style-type: none"> <li>• Direction is provided on the assignments to be undertaken, with the occupant determining the appropriate use of established methods, tasks and sequences.</li> <li>• There is some scope to determine an approach in the absence of established procedures or detailed instructions, but guidance is readily available.</li> <li>• Performance is checked by assignment completion.</li> </ul>
<b>Broad Direction</b>	<ul style="list-style-type: none"> <li>• Direction is provided in terms of objectives which may require the planning of staff, time and material resources for their completion.</li> <li>• Limited detailed guidance will be available and the development or modification of procedures by the employee may be required.</li> <li>• Performance will be measured against objectives.</li> </ul>
<b>Benchmarks:</b>	<ul style="list-style-type: none"> <li>• <b><i>Close Supervision – HEW 1 Level; Close to Routine Supervision – HEW 2 Level</i></b></li> <li>• <b><i>Routine to General Supervision – HEW 3 – 1<sup>st</sup> level where there may be the supervision of other staff</i></b></li> <li>• <b><i>Routine to General Supervision – HEW 4 and HEW 5 Levels</i></b></li> <li>• <b><i>General to Broad Supervision – HEW 6 Level</i></b></li> <li>• <b><i>Broad Supervision, HEW 7, 8, 9, and 10 Levels</i></b></li> </ul>

## Monash University: General Staff Classification Descriptors – Definitions for Qualification Levels

Qualification Reference	Definition – <i>Note: The definitions below also include equivalent, recognised overseas qualifications.</i>
<b>Year 12</b>	<ul style="list-style-type: none"> <li>• Completion of Year 12 of secondary school.</li> </ul>
<b>Trade Certificate</b>	<ul style="list-style-type: none"> <li>• Completion of an Apprenticeship, normally of 4 years duration or,</li> <li>• Equivalent recognition.</li> </ul>
<b>Post-trade Certificate</b>	<ul style="list-style-type: none"> <li>• A course of study over and above a Trade Certificate and less than an Advanced Certificate.</li> </ul>
<b>Advanced Certificate</b>	<ul style="list-style-type: none"> <li>• A two-year, part-time, post-Year 12 or post-Trade Certificate course or,</li> <li>• A four year part-time course for those who have completed Year 10 only of secondary school.</li> </ul>
<b>Certificate</b>	<ul style="list-style-type: none"> <li>• A two year full-time or four year part-time course, without a Year 12 prerequisite.</li> </ul>
<b>Associate Diploma</b>	<ul style="list-style-type: none"> <li>• A two year full-time or four year part-time course with a Year 12 prerequisite.</li> </ul>
<b>Degree</b>	<ul style="list-style-type: none"> <li>• A recognised degree from a tertiary institution, often completed in three or four years and,</li> <li>• Sometimes combined with a one-year diploma.</li> </ul>
<b>Postgraduate Degree</b>	<ul style="list-style-type: none"> <li>• A recognised postgraduate degree, over and above a degree as defined above.</li> </ul>
<b>General Benchmarks</b>	<ul style="list-style-type: none"> <li>• <b>Cannot require a degree level qualification for positions of HEW 4 level and below.</b></li> <li>• <b>A degree qualification requirement appears from HEW 5 level onwards.</b></li> <li>• <b>Key elements include; Qualifications, Experience, Communication Skills and Planning and Organisational Skills.</b></li> </ul>



### EVALUATION WORKING SHEET

Position Title:.....Current Classification Level:.....Proposed Classification Level:.....

Faculty/Department:.....

Name of evaluator (s) .....

Date Received: .....Date Evaluated:.....

Position Classification Descriptors	Comments/Justification/Questions	Grade
Training Level or Qualifications – <i>must accord with the requirements of the HEW level proposed.</i>		
Judgement, Independence, Problem Solving		
Organisational Knowledge		
Task Level		
Level of Supervision		
Typical Activity		
Occupational Equivalent		

Other Comments/Actions/Recommendations:

**CLASSIFICATION OUTCOME**

# PD Evaluation Cover Sheet

Attachment 1E

**INTERNAL USE ONLY**

DATE RECEIVED:

PD REF NUMBER:

CURRENT OCCUPANT:

CURRENT SALARY:

TIME FRACTION:

TITLE OF POSITION:

DEPARTMENT:

FACULTY/DIVISION:

<p>EXISTING LEVEL:          LEVEL SOUGHT:          NEW LEVEL:</p>
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The current position description (if relevant or available) is attached:	YES/NO
A completed Classification Proposal Form is attached	YES/NO
A new/proposed position description is attached:	YES/NO
A current organisation chart clearly showing the relevant role, reporting relationships and staffing responsibilities is attached:	YES/NO

COMMENTS/FURTHER ACTION:

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CLASSIFICATION COMMITTEE:

- |           |           |           |
|-----------|-----------|-----------|
| <b>1.</b> | <b>2.</b> | <b>3.</b> |
|-----------|-----------|-----------|

MEMO SENT DATE:

MEMO SENT TO:

CC:

### POSITION DESCRIPTION CHECKLIST

Date Documentation Received: _____	YES	NO
HEW 8 & 9	<input type="checkbox"/>	<input type="checkbox"/>
HEW 1 – 7 (Internal – Organise external evaluator)	<input type="checkbox"/>	<input type="checkbox"/>
Incumbent?	<input type="checkbox"/>	<input type="checkbox"/>
Up to Date Position Description Attached?	<input type="checkbox"/>	<input type="checkbox"/>
Completed Classification Proposal Form Attached?	<input type="checkbox"/>	<input type="checkbox"/>
Signatures on both the PD and the Proposal?	<input type="checkbox"/>	<input type="checkbox"/>
Current Organisation Chart Attached?	<input type="checkbox"/>	<input type="checkbox"/>
Old PD Attached (if Reclassification sought)?	<input type="checkbox"/>	<input type="checkbox"/>
Other: _____ _____	<input type="checkbox"/>	<input type="checkbox"/>

Evaluators:

Date Documentation Forwarded to Evaluators: \_\_\_\_\_

Date Evaluators Convened:

\_\_\_\_\_

Comments/Actions:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Chapter 6

### Monash University Position Descriptions – Including Position Description Link and How to Write

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#### ***Purpose of a Position Description:***

The purpose of a position description is to provide an accurate, concise description of the organisational location, primary objectives and key responsibilities of the position and the key skills, knowledge, experience and other attributes required to perform effectively in the role.

#### ***Uses of a Position Description:***

A position description has many uses. Some of these include:

- Identifying the primary focus of the job and the key areas of responsibility
- providing information about the job to prospective applicants
- providing the basis of selection activity and decision making in filling the position
- providing the basis for the development and agreeing of performance goals in the performance management process
- recording the requirements of a position at a point in time, so that any changes can be measured against a base line
- providing an accurate description of the position requirements for position evaluation and classification purposes

#### ***What a Position Description is NOT:***

A useful and effective position description is NOT:

- a complete list of all of the individual tasks a staff member is required to perform (all tasks will generally be covered by one or more key duties)
- a description of the current incumbent's skills, knowledge, experience and attributes
- a reproduction or paraphrasing of the Position Classification Descriptors for a particular HEW grade level
- written to convey a particular impression or achieve a particular classification outcome, regardless of what the incumbent of the position actually does
- a forum for the detailing of key performance indicators; these should be contained in the performance management plan
- a static document which cannot be changed; the position description needs to evolve as the role and responsibilities of the position evolve

#### ***Features of a Position Description:***

In order for a position description to fulfil its purpose and be fit for the various uses, it must be:

- for the purpose of good management practise, regularly reviewed – particularly as part of the performance management process, and whenever a position falls vacant and must be filled
- position descriptions which are regularly updated provide staff and supervisors with a check point and historical evidence to track changes to the job role and responsibilities. These changes may either be minor or significant enough to trigger the review of the current classification level of the position
- current and accurate; a position description should be revised whenever significant changes are made to requirements of the position, whether or not this results in a classification review

- concise, clear, readable and relatively free from jargon; this is important not just for external audiences (eg prospective applicants for an advertised position) but also to promote role clarity and minimise misunderstandings in the work place
- accessible – supervisors should ensure they have copies of current position descriptions for all staff, and that these are dated and filed securely; staff members should also have copies of their own current position descriptions

### ***Process for Preparing a Position Description:***

Where a position is **occupied** and the requirements of the position have changed – either significantly enough to warrant review of the classification, or significantly enough to warrant changes to the position description, the following process should be followed:

1. The staff member and the supervisor should meet to discuss and agree the current requirements of the position, and the nature and extent of any changes that have occurred. Either the staff member or supervisor may initiate this discussion. Additional information (eg discussion with other members of the work unit, external contacts etc) may be gathered to assist the process of clarifying the requirements of the position.
2. A new position description should be prepared, preferably by a person trained in the development of position descriptions to ensure the agreed current requirements of the position are comprehensively articulated. The initial draft of the position description is usually prepared by the staff member, but can be done by the supervisor or a third person if necessary.
3. The staff member and supervisor should meet to review the new position description and to amend and finalise it as necessary.
4. Both the staff member and supervisor should sign the new position description as an accurate description of the current requirements of the position. The Faculty or Administrative Unit may require other authorised persons to also sign the completed position description.
5. The position description may now be used in the appropriate Monash University processes – classification, recruitment/selection, performance management etc.
6. Positions expected to be classified around the HEW 8, 9 or 10 levels must be submitted to HR Operations for the centralised classification and evaluation processes (please refer to the appropriate Chapters (3 & 4) contained in this Manual for details of the classification procedures pertaining to these levels).

Where a position is **new**, or an existing position is **vacant**, the same process is followed, but without the participation of a staff member as the current incumbent.

### ***The Monash University Position Description Format:***

All Monash University position descriptions need to be written in the standard format displayed in the established template.

Should staff members and supervisors wish to include additional material which cannot be incorporated into this template, such material can be attached to the position description, and/or referred to in the text of the position description. It should be remembered that position descriptions should be concise, clear and readable, and any additional material should be kept to an absolute minimum.

***Writing a Position Description:***

The following is a broad overview of the sections of the position description and how they should be completed.

**‘POSITION DESCRIPTION – page 1’**

**The first page of the position description provides the identifying information about the position. It is very important that this information is updated – and signed by all authorised persons - each time a change occurs (eg when the fraction of the position changes, or when any part of the position description changes) whether or not any change is made to the position classification.**

**‘Position Title’**

Each position should have an identifying title. A number of positions performing the same functions may have the same title. The title assigned to a position must conform to any applicable Monash University policies.

**‘Department / Unit’**

The immediate work area in which the position is located is specified here.

**‘Faculty / Division’**

The Faculty / Division in which the position is located is specified here.

**‘Classification’**

This is the current, approved HEW level classification of the position as described in the position description.

Where the position is occupied, and is submitted for classification review, the existing position description (including the existing classification) and a new position description must be submitted with the Classification Proposal form. The ‘Classification’ line on the new position description may be left blank, however, a note indicating the classification level sought or proposed be helpful in focussing the deliberations of the Classification Evaluation Committee within a reasonable range of descriptor criteria. Once classified, this line can be completed on the new position description.

Where a position is new or vacant, the ‘Classification’ line on the new position description may be left blank, or once again, a note may be added to indicate that classification is being sought as well as the classification proposed by the Faculty/Administrative Unit. Once classified, the relevant information can be inserted on this line of the position description.

**‘Fraction’**

The time fraction of the position (ie either ‘Full Time’, or ‘Part Time’ and if part time, the percentage of full time, or the hours worked per week or month) should be specified here. Please note that the time fraction of the position may not be the same as the time fraction of the current incumbent – for a range of reasons including job share, graduated return to work, etc.

**‘Date Position Description Effective’**

For an occupied position, this is the date that all authorised people have agreed represents the point from which all the requirements of the position were being performed as described in the position description. This is an important date, as it is the date from which any changes to the position are measured. This is the reason position descriptions must be regularly reviewed and updated and/or rewritten when this is necessary.

Generally, this date will also be the date from which the position as described will be considered to be classified, once a classification has been assigned by the Position Classification Authority. If this date is more than three months prior to the date the position is submitted for classification, comprehensive reasons for the time gap will need to be provided on the Classification Proposal form.

**‘Prepared By’**

This is the person who prepared the documentation and/or is the best person to contact should there be any queries in relation to the documentation and the date the documentation was prepared.

### **‘Approved By’**

The position description should be signed as approved by the incumbent and the supervisor, and the Department / Unit Head, and Dean / Divisional Director, as required by the Faculty / Administrative Unit’s delegated authorities in the position classification process. The names and titles of each signatory are to be typed or printed legibly. The dates beside each name are dates of signing and have no effect on the ‘Date Position Description Effective’ (see above).

### **‘POSITION DESCRIPTION – page 2’**

**This part of the position description provides the key information about the organisational location, objectives, key responsibilities and key skills / knowledge / experience / other attributes relevant to the position.**

#### **‘Organisational Context’**

This section locates the position in the organisation, specifies any supervisory or budget responsibilities and may provide a statement of the major impact / focus / objectives of the position, if this is necessary and/or useful.

The title and a brief descriptive overview of the Department/Unit in which the position is located should be provided. This should be brief and state the major functions or responsibility areas of the Department/Unit. If the position is located within a Branch or sub-unit, this should be named.

An up to date organisation chart must be included or attached to the Position Description and provision is made for the person preparing the documentation to circle whether the organisation chart has been included or not.

The title of the position’s supervisor (i.e. the position to which this position reports) also needs to be stated, a brief description of the role of the supervisor and the titles/functions of other positions reporting to that supervisor, may be included.

Where the position supervises staff, the titles and a brief description of the roles of the staff supervised need to be stated.

Where the position has budget responsibility, the approximate amount of the budget (and its type if relevant – eg grants, operating, capital, etc) and the level of responsibility need to be stated.

A brief statement of the major impact, focus, or objectives of the position should also be provided here. Any such statement should focus on the *outcomes* required of the position – i.e. what it is expected to achieve – rather than on tasks, functions or responsibilities.

#### **‘Key Results Areas and Responsibilities’**

These are the major *outputs* for which the position is responsible – the key, important *broad areas* of work that the position must cover.

Each ‘Key Responsibility’ should cover a separate *function* or area of work (i.e. do not combine two or more functions in the one statement) and they should be listed in order of importance.

Each ‘Key Responsibility’ should begin with an action verb, eg ‘prepare’, ‘maintain’, ‘research’, ‘gather’, ‘manage’, etc.

Where OHS&E, Equity, and/or staff supervision responsibilities are formally part of the position (as opposed to additional functions voluntarily assumed by a staff member), these must be included in the list of ‘Key Responsibilities’ (see Chapter 9 of this manual for more information on OHS&E and Equity Protocols). Where staff supervision responsibility is listed, the extent of the responsibility should be stated.

‘Key Responsibilities’ are not detailed lists of tasks to be performed, nor detailed descriptions of how the work is carried out, but are broad statements of the major functional areas of work. For lower level positions, the statements will be simpler and can be more like tasks, but for higher level positions, the statements will cover broad functional responsibilities and will be output-oriented.

Most positions can be adequately covered by 5 ‘Key Responsibilities’ and no position should require more than 8 ‘Key Responsibilities’.

Sub headings are not required.

### **‘Key Selection Criteria’**

This section provides information which is critical to the recruitment and selection processes – i.e. it is the means by which potential applicants gauge whether they have the appropriate skills, knowledge, experience etc to apply for the position; it is the means by which a selection panel assesses applicants and makes a selection decision; and it is the basis on which any review of a selection decision is made.

The ‘Key Selection Criteria’ are also important for the position evaluation and classification processes – they assist position evaluators to judge the level of the position by specifying what a potential incumbent must bring to the position and what levels of technical and general skills and knowledge are required.

It should be noted that the General Staff Classification Descriptors contain broad specifications of the ‘Training Level or Qualifications’ required for each HEW level. The ‘Key Selection Criteria’ for any position must be consistent with the specifications in the descriptors.

The ‘Key Selection Criteria’ should list the primary skills, knowledge, experience and other attributes required to perform the responsibilities of the position. These should be realistic and care should be taken not to ‘over prescribe’ what is required to perform any particular position. Very specific prescriptions (eg of particular local knowledge, of experience in specific processes or software packages) or very onerous requirements (eg of long years of experience, of very high qualifications) are often not necessary and will deter good applicants from applying when the position is advertised.

Where an accredited qualification, or licence, or professional accreditation or membership is **legally** mandatory for the performance of some or all of the duties of the position, then this should be stated first in the ‘Key Selection Criteria’. If such a requirement is mandatory, then an applicant who does not possess and/or cannot produce documentary evidence of the requirement cannot be considered for the position under any circumstances.

**Please note that should the position be in the Finance/Accounting category and require the incumbent to be a member of a professional association (i.e. CPA etc.) and maintain that professional association during the life of the incumbency, it is appropriate for the work area to pay for the continuing membership. The requirement for the incumbent to be a member of a particular professional association should always be documented in the position description and be given a higher order of priority in the listing of Key Selection Criteria.**

The ‘Key Selection Criteria’ should also be capable of assessment – i.e. it must be possible to determine whether a person possesses the skill, qualification, experience or attribute through some means (eg by asking for evidence, by questioning at interview, by checking referees, etc).

The ‘Key Selection Criteria’ should not simply list the skills, qualifications and experience possessed by the current or most recent incumbent – many people possess or gain skills, qualifications and experience over and above, or unrelated to, the requirements of the positions they occupy. The ‘Key Selection Criteria’ must reflect the requirements of the position itself, at the time the position description is written or updated.

The ‘Key Selection Criteria’ should be listed in order of importance and numbered.

It should not be necessary to list more than 8 ‘Key Selection Criteria’. Any more than 8 criteria are difficult to assess during selection and are often repetitive and encourage ‘over prescription’ of the requirements of the position.

### **‘Other Job Related Information’**

This section provides additional information on any unusual demands or advantages related to the position – eg requirements for travel, shift work, on-call arrangements, out of hours work, overtime etc. – that it is important a potential applicant knows about prior to making an application for an advertised position. This section should **not** be used to list additional ‘Key Responsibilities’ or ‘Key Selection Criteria’.

<http://www.adm.monash.edu.au/sss/classifications/>

## Chapter 7

### Classification Proposal – Including Classification Proposal Form Link and How to Write

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#### ***Purpose of a Position Classification Proposal:***

The purpose of a position classification proposal is to document the basis for the classification of a new position, or the reclassification of an existing position (occupied or vacant) for HEW 1 to 9 level positions. The position classification proposal is recorded on the Position Classification Proposal Form, which sets out:

- the reasons for a new position coming into existence, or the changes that have occurred to an existing position; this section is crucial for providing the context and substantiating information and evidence that there has been a significant change to an existing position/the need for a new position,
- the key features of the new or changed position, under the headings of the General Staff Position Descriptors from the *Monash University Enterprise Agreement (Academic and General Staff)*; and
- the proposed effective date for the classification/reclassification and the justification for that date if significantly prior to the submission date.

For existing positions, the Position Classification Proposal Form is accompanied by both the existing and a new position description. For new positions, a new position description only is required.

#### ***Process for Submitting a Classification Proposal:***

Where a position is occupied and the requirements of the position have changed significantly enough to warrant review of the classification, the following process should be followed:

1. A new position description for the position should be prepared (see the relevant Monash University guide to the preparation of position descriptions in Chapter 6).
2. The existing (or 'old') position description should be obtained. In some instances, there may not be an existing (or old) position description. In these cases, the Position Classification Proposal Form is particularly important in describing the changes which have occurred over time and which warrant the review of the position's classification level.
3. The person/people preparing the Position Classification Proposal Form (ie the staff member who occupies the subject position; or the supervisor; or preferably, the staff member and supervisor in consultation) should review the changes that have led to the new position description and document those changes as required on the Position Classification Proposal Form (see below for more information on completing the Form).
4. An important part of the documentation is the specification of and justification for, the new effective date for any resulting reclassification of an existing, occupied position. The supervisor and Department/Unit Head who must authorise and formally submit the position classification proposal must agree on the date from which the changes to the position and the resulting key result areas and responsibilities as described in the new position description, were fully (or very substantially) in place.
5. The final documentation (ie the completed Position Classification Proposal Form and the existing and new position descriptions must be signed by the incumbent and then authorised and formally submitted by the supervisor and/or the Department/Unit Head).
6. The documentation is then submitted to the Faculty/Division's Classification Committee Coordinator (a nominated committee for each Faculty/Division) or HR Operations for positions at the HEW 8 and 9 levels. The Faculty/Division or centralised Classification Committee undertakes the work of evaluating and assigning a classification to the position and forwarding the assigned classification to the relevant delegate for authorisation of the final classification outcome. The relevant delegate then arranges for the Department/Unit Head and/or supervisor and staff member (if the position is occupied) to be notified of the classification outcome.

7 It should be noted that reclassification decisions involving HEW 1 to 9 level positions are subject to review at the request of the incumbent, under the terms of the [Monash University Enterprise Agreement \(Academic and General Staff\) 2005](#).

Where a position is new, or an existing position is vacant, the same process is followed, but without the participation of a staff member as the current incumbent.

### ***The Monash University Position Classification Proposal Form:***

All proposals for classification or reclassification of general staff positions must be documented and submitted in the standard format displayed in the template.

### ***Writing a Position Classification Proposal:***

The following is a broad overview of the sections of the Position Classification Proposal Form and how they should be completed.

#### **‘POSITION CLASSIFICATION PROPOSAL – page 1’**

**The first page of the Position Classification Proposal Form provides the identifying information about the position and other information which is useful in the classification process.**

#### **‘Position Title’**

Each position should have an identifying title. A number of positions performing the same functions may have the same title. The title assigned to a position must conform to any applicable Monash University policies.

#### **‘Department / Unit’**

The immediate work area in which the position is located is specified here.

#### **‘Faculty / Division’**

The Faculty / Division in which the position is located is specified here.

#### **‘Current Classification’**

Where the position is an existing one, this is the current, approved HEW level classification of the position. This classification should be the same as that specified on the front page of the existing position description.

Where a position is new, the ‘Current Classification’ line on the Position Classification Proposal Form should be left blank, or filled in with the words, ‘new position – proposed classification level; HEW (*specify the level sought*)’.

#### **‘Fraction’**

The time fraction of the position (i.e. either ‘Full Time’, or ‘Part Time’ and if part time, the percentage of full time, or the hours worked per week or month) should be specified here. Please note that the time fraction of the position may not be the same as the time fraction of the current incumbent – for a range of reasons including job share, graduated return to work, etc.

#### **‘Prepared By’**

This is the person who prepared the documentation and/or is the best person to contact should there be any queries in relation to the documentation. It should also be indicated whether the documentation is a re-submission of a recently submitted classification proposal.

#### **‘Checklist’**

This section of the document provides a ready checklist to ensure that all relevant documentation is contained in the classification proposal package (i.e. the current and, if relevant, old position descriptions and organisation chart).

#### **‘Proposal Submitted By’**

The Position Classification Proposal Form must be authorised and formally submitted by the supervisor, and/or the Department/Unit Head. The form should also be signed by the incumbent. The names and titles of each signatory are to be typed or printed legibly. The dates beside each name are

dates of signing and have no effect on the proposed 'Effective Date' of the classification or reclassification (see below).

## **'POSITION CLASSIFICATION PROPOSAL FORM – page 2'**

**This part of the Position Classification Proposal Form provides the key information about the reasons for the submission; the features of the proposed position, or changes to the existing position; and the specification of, and justification for, the effective date of the classification or reclassification.**

### **'Reasons for Submission'**

This section should contain a *brief* but comprehensive explanation of the reasons for the position classification proposal, i.e. the reasons why a new position has been created and is submitted for initial classification; or the reasons why an existing position has changed significantly enough to warrant submission for review and possible reclassification.

Where the position is new, a brief explanation of the need for the position and the decisions leading to its creation should be provided. Where the position is an existing one, a brief explanation of the changes that have occurred and the reasons for them should be provided including the fact that these changes are ongoing. These could include such circumstances as:

- a new function has been taken on by the Department/Unit (the nature of the new function should be explained); or
- additional workload requires more resources (the reasons for the additional workload should be explained); or
- new systems, processes, technologies etc have been introduced which have changed the skill, responsibility or other features of an existing position (the nature of the changes and their effect on the position should be explained); or
- a restructure or reorganisation in the Department/Unit has led to the need for the new position or to changes to an existing position's responsibilities (how this came about should be explained); etc.

The reasons for any key features of the new or changed position should also be explained briefly, eg staff supervision responsibilities; budget responsibilities; particular complexities in the work; etc. This section provides the context and supporting information/evidence for the proposed action and should be presented in the form of a business case which includes the purpose, substantiating arguments and key features for consideration by the Classification Evaluation Committee.

### **'Proposed Position'**

In this section, the features of the new or changed position should be described, using the headings of the General Staff Classification Descriptors as referred to in the *Monash University Enterprise Agreement (Academic and General Staff) 2005*. The descriptors are the basis for position evaluation, in that during evaluation, the features of the position are compared against the descriptors to determine which HEW classification level the position most fully corresponds to.

While there are seven key descriptor dimensions, the following five descriptors are of particular importance and impact significantly on the classification level of the position:

- Training/Qualifications (if these do not align to the relevant HEW grade level descriptors, then the position cannot be classified at or reclassified to a higher grade level regardless of any other complexities involved.
- Organisational Knowledge
- Judgement, Independence and Problem Solving
- Task Level
- Level of Supervision

It is important to ensure that each of these descriptors are comprehensively covered in the proposal document and that, in the case of an existing role, the responsibilities both before and after are described under each of these dimensions.

The remaining two dimensions (i.e. Typical Activities and Occupational Equivalent) describe some of the typical activities of the position or provide some comparative information with other positions. While this information is nice to know, it is not critical to the determination of the position's classification level.

### **'New Effective Date'**

This part of the documentation specifies and justifies, the effective date for the initial classification of the position, or the effective date for any reclassification of an existing position which may result from the submission of the position classification proposal.

Where the position is new (and therefore unoccupied) this date will generally be the date the final classification outcome is authorised by the relevant delegate.

Where the position is an existing, occupied one, this date *must* be the date from which the changes to the position as described in the Position Classification Proposal Form and the resulting key result areas and responsibilities as described in the new position description, were fully (or very substantially) in place and operating.

If the proposed effective date is *prior* to the date of the submission of the position classification proposal, a detailed explanation must be provided. It is not good administrative or management practice to allow significant changes to a position, which are sufficient to warrant submission of a position classification proposal, to operate for lengthy periods before this action is taken. It places unreasonable and unfair burdens on staff if they are expected to perform the requirements of a significantly higher level position for a long time without appropriate recognition or remuneration.

In order to justify a substantially 'backdated' effective date, all, or the substantial majority, of the responsibilities of the changed position *must* be shown to have operated from the earlier date. It should be noted that where the position has changed gradually over time, the 'correct' effective date will not be the date the changes started, but the date the substantive majority of the changes were in place and 'visibly' operating.

The supervisor and Department/Unit Head who must authorise and formally submit the position classification proposal must agree on the proposed effective date.

### **'New / Existing Position Description Documentation'**

Where the position is a new one, only the new position description will be attached to the Position Classification Proposal Form.

Where the position is an existing one, both the existing position description and the new position description (if available) will be attached to the Position Classification Proposal Form. Since the basis of a proposal for reclassification is that the requirements of the position have changed, those undertaking the classification evaluation must be able to judge the changes based on a comparison of 'old' and 'new' position descriptions or, if an old position description cannot be sourced, be provided with significant information in the body of the Position Classification Proposal Form to make an informed evaluation.

Position descriptions should be prepared in the Monash University Position Description format.

- <http://www.adm.monash.edu.au/sss/classifications/>

## Chapter 8

### Review of Classification Decisions

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If you are aggrieved by the classification level (i.e. for HEW 1 to 9 level positions) assigned to your position, you may request a review of the evaluation of your position by the Classification Review Committee.

**If you wish to submit your position description for review by the Classification Review Committee you must;**

- Complete the attached form and ensure it is signed by all parties indicated.
- Forward the completed form to:  
Secretary,  
Classification Review Committee  
Human Resources Division

The unchanged position description will then be forwarded, with your completed form, to the Committee for review.

Your request for review must reach the Secretary, Classification Review Committee within 3 months of the date of receiving notification of the classification level assigned to your position.

The completed form will be examined by a committee comprised of the following members trained in the use of position descriptors: the nominee of the Vice President (Administration); a nominee of the Dean/Divisional Director of the area in which the staff member is located; two nominees of the Chairperson of MUSIC, drawn from a pool of elected staff members.

**GENERAL STAFF  
REQUEST TO REVIEW  
BY  
CLASSIFICATION REVIEW COMMITTEE**

Name of job holder:	
Signature of job holder:	
Contact phone number:	
Position Title:	
Department/Section:	
Current HEW Level:	
Date of Evaluation:	

I am aware of the above mentioned staff member's intention to lodge a request for review by the Classification Review Committee. My endorsement of this form signifies only that I have sighted this request.

	<b>Signature</b>	<b>Telephone Number</b>
Supervisors Name:		
Head of Department:		
Dean/Divisional Director:		

Please indicate (\*) the nominated contact person, other than the incumbent, who has a detailed knowledge of the position that the Committee can refer any questions to.

Please prepare your case for a review of the evaluation of your position in line with the General Staff Classification Descriptors contained in the Monash University Enterprise Agreement (Academic and General Staff) 2005. A copy of the Enterprise Agreement may be obtained from Human Resources or accessed at:

<http://www.monash.edu.au/entbarg/academic-general-2005/>

The criteria listed under Occupational Equivalent and Typical Activities are intended to be used as a guide only, and will not necessarily reflect the actual duties performed in your position. Therefore you should place the emphasis of your case on the following 5 criteria ie., Training Level or Qualifications, Level of Supervision, Task Level, Organisational Knowledge and Judgement, Independence and Problem Solving.

I would like to lodge a request to review the recent evaluation of my position on the following basis:

**Training Level or Qualifications**

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**Level of Supervision**

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**Task Level**

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**Organisational Knowledge**

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**Judgement, Independence and Problem Solving**

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**Occupational Equivalent**

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**Typical Activities**

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## Chapter 9

### Monash University Position Descriptions – OHS&E and Equity Protocols

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Occupational health, safety & environment (OHS&E) and employment equity principles should be clearly stated in every position description where staff supervision or management is a requirement of the position.

While inclusion of this information will not necessarily facilitate a change in the classification of a position, it will highlight the important nature of these functions in a supervisor/manager's role. Thus such responsibilities should be written into the position description, and acknowledged as part of the responsibility of the incumbent.

The following section provides a guide for inclusion of responsibility for OHS&E and equity principles into the general staff position description, in accordance with the preferred University format.

It is recognised that these OHS&E and equity roles and responsibilities must be clearly defined for all levels of management and supervision and that successful implementation of the roles and responsibilities can be monitored through existing performance evaluation processes.

An important point to remember is that where committee membership is a choice of the current incumbent, rather than a specific responsibility or function of the position, this should be clearly noted. For more information see the OHS&E website below:

- <http://www.adm.monash.edu.au/ohse/index.html>

## Chapter 10

### Faculty Based Committee Structure

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Evaluation and classification of positions is to be completed by Faculty/Administrative Unit based committees for positions classified at the HEW 1 to 7 levels. Positions classified at the HEW 8, 9 & 10 levels must be forwarded to HR Operations for evaluation by centrally based classification committees.

The Dean, Divisional Director or equivalent will nominate staff to be trained in position evaluation for membership on classification committees.

The Chair of the Committee should be the Faculty Manager or equivalent, if available, or a nominee. The Chair will coordinate the evaluation of the Faculty/Administrative Unit's position evaluations and undertake other duties as required in the position of a Committee Chair.

It is recommended that Faculties and Administrative Units adopt a committee structure in line with the following:

- The core committee will consist of three members:
  - two members of staff from the Faculty/Administrative Unit, preferably with substantial HR/line management experience,
  - at least one of these staff members will be at or above HEW level 8. All staff should be at such a level that they have a thorough understanding of the classification system and be at a level that is commensurate with the experience and knowledge to understand what is required,
  - one member from central administration or another Administrative Unit or another Faculty to ensure consistency.

Centralised Classification Committees are established and operated using these same basic principles, with one member being drawn from a Faculty or Administrative Unit for the HEW 8 and 9 level positions.

All three members will be required to be trained in position description evaluation, offered by Human Resources Division, or have equivalent relevant experience and/or training.

The committee shall call upon specialists as required, to provide expert knowledge and expertise which will assist the Classification Committee in evaluating complex positions.

Faculties and Administrative Unit Committees will be responsible for regulating their own process in terms of the frequency, duration and structure of meetings. As a general guide, the Classification Committee will arrange to convene and, barring any major issues with the documentation, determine the classification proposal outcome within approximately two weeks upon receiving full documentation for evaluation of a position description. The Advice of Classification Form must be forwarded to Human Resources Division following the final sign off by the Dean/Divisional Director.

In accordance with the University's EEO policy, both genders should be represented on the committee.

Signatory authority: The Chair of the Committee will be responsible for forwarding the committee's evaluation recommendation to the Dean, Divisional Director or equivalent for sign off in line with established financial delegation procedures.

The Human Resources Division will retain responsibility for Classification Reviews in accordance with current procedures.

## Delegated Authorities in the Classification Process

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<i>Step / Task</i>	<i>Delegated Authority Level</i>
Approve New PD – occupied position	Immediate Supervisor and Head of Department
Approve New PD – new or vacant position	Immediate Supervisor and Head of Department
Approve Classification Proposal	Immediate Supervisor and Head of Department
Evaluate Position / Recommend Classification	Faculty/Division based Evaluation Committee
Confirm / Approve Classification	Dean/Divisional Director
Review Classification Decision – Confirm or Amend Classification	Classification Review Committee (as per Clause 67 of the Enterprise Agreement)

## Chapter 11

### Monitoring and Auditing Classification Decisions

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Faculty/Administration Unit based Classification Committees will be responsible for recording and monitoring their own evaluations and classifications, for the purpose of reporting and auditing.

The following information will be required to be submitted to Human Resources Division on a regular basis:

- Faculty, department, school, etc
- Number of Classification Committee meetings held throughout the year
- Number, gender and classification level of the evaluators at each Classification Committee meeting
- Whether positions are evaluated at the same HEW level or reclassified to a different HEW level, and the reclassification levels
- Gender of applicant/incumbent for proposed reclassification/s
- Gender of incumbents for successful and unsuccessful reclassifications

Human Resources Division will then collate this information as well as the following information:

- Number of applications for evaluation of occupied positions received
- Number of evaluations for new positions

Submission Dates for reporting requirements will be advised by Human Resources Division.

Please note that this record keeping for classification processes is also of benefit to the Faculty/Division in terms of identifying trends and tracking classification, reporting and structural changes. It may also help to inform planning processes in relation to establishing good practise timelines for the processing of classification proposals.