

**TRANSFORMING  
THE POSITION CLASSIFICATION STRUCTURE  
OF THE  
UNIVERSITY SYSTEM OF GEORGIA**

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## **ABSTRACT**

*In August 2003, the University System of Georgia “retired” its 33-year-old centralized job classification system, which had long been the source of campus concern. The new model that replaces it is the result of a two-year, cross-functional and cross-institutional initiative that reduces the job classification structure from almost 1,700 titles to about 200 job categories. The changes positively impact a broad range of organizational activities, including strategic planning, human resources, budget management, institutional research, information systems, and EEO/Affirmative Action activities.*

*Built upon IPEDS federal reporting requirements, the new system –*

- *Eliminates obsolete, mandatory job titles*
- *Supports consistent legal compliance and reporting across 34 institutions, and*
- *Creates flexibility & reduces shadow systems at the campus level*

*The new model “went live” on August 27, 2003.*

## **INTRODUCTION OF THE INSTITUTION**

The 34-school University System of Georgia (USG) was first established in 1931. Under Chancellor Thomas C. Meredith, it comprises four research universities, two regional and thirteen state universities, two state colleges, and 13 two-year colleges, in locations that range from very rural to very urban. The USG is governed by a 16-member Board of Regents, with members appointed by the Governor. In FY 2000, its overall budget was \$3.7 billion.

The USG enrolls a diverse and growing population of more than 220,000 students, about 90% of whom are Georgia residents, with students from all 50 states and 180 foreign countries. The University System employs approximately 9,000 fulltime faculty and 26,000 fulltime staff employees.

## **STATEMENT OF THE PROBLEM / INITIATIVE**

During 2001, in support of its ambitious long-term strategic plan, the University System of Georgia (USG) Central Office undertook an initiative to streamline and modernize its policies and practices. The goals included improving its Policy and Business Procedure manuals, supporting institutional autonomy as appropriate, and doing away with non-value-added processes that had grown up over time.

The USG solicited feedback from campus presidents, chief business and chief academic officers, and other campus constituents about policies or procedures that created obstacles to institutional effectiveness.

One of the most-frequently-cited HR issues was the University System's job-title structure, known as B-Codes. For more than thirty years, all 34 institutions of the USG used this single, prescribed set of coded job titles for faculty and staff positions, as mandated in Board of Regents policy.

There were many frustrations with the B-Codes. The titles initially had been borrowed from a system already in use at the University of Georgia in the 1960s. Although there were thousands of job titles, many were obsolete, and many titles desired by campuses did not exist. Creating any new job title required approval at the University System level, but there was reluctance to add new titles to a structure already bursting at the seams. In practice, many titles were not interpreted or utilized consistently across the institutions. The campuses -- which range from small 2-year colleges to complex Research I universities -- were stymied by the antiquated one-size-fits-all inflexibility of the system to meet their specific institutional needs. The larger schools, in particular, had developed informal "shadow" systems to work around the limitations of the existing structure

Beyond that, each B-Code carried designations that dictated how positions were to be assigned for various external reporting purposes. Unfortunately, the original designations had long failed to reflect evolving reporting requirements. Consequences included, for example, federal data submissions that were not fully consistent with IPEDS instructions, resulting in over-reporting of some job categories.

## **DESIGN**

*Sponsorship.* Prompted in part by pending changes in federal IPEDS reporting categories, individuals from several University System institutions volunteered to meet as a Project Team and discuss the institutions' methods of tracking and reporting of faculty and staff positions.<sup>1</sup>

<sup>1</sup> *The early initiative came, to some extent, in response to the introduction of a new IPEDS category, which NCES implemented, but subsequently withdrew --apparently after receiving feedback from educational institutions. Nonetheless, the Georgia project proceeded because of its many other potential benefits.*

The USG's senior vice chancellor for Support Services and the associate vice chancellor for Human Resources supported the Project Team's efforts, served as project sponsors and champions throughout the process, promoted the initiative to other senior System leaders and Board members, and ensured that the project was introduced on the agenda for formal approval by the Board of Regents.

*Budget.* No dedicated project budget was provided for additional personnel, formal release time, capital equipment, or operating expenses. However, the design, marketing, and implementation of the initiative involved considerable time and effort of dozens of individuals, both functional and technical. The conceptual design work alone – by being developed internally rather than contracting to an external consulting firm – resulted in cost avoidance of at least an estimated \$150,000. The technical design aspects, also performed in-house, would account for at least comparable cost avoidance.

*Participation.* Participants included Human Resource and Institutional Research professionals from a broad cross-section of System institutions, including:

- Georgia State University
- The University of Georgia
- Medical College of Georgia
- Georgia Southern University
- Georgia College & State University

The first meeting was held in March 2002. The working group recognized that retrofitting a new structure onto existing institutional assumptions, historical practices, and active titles would be a challenge, regardless of when an overhaul was undertaken. However, given the discontent and frustration that had been mounting for years among campus academic and administrative leaders with the aged B-Code system, the time seemed right to suggest a proposal. The committee believed the campuses would be willing to absorb the temporary discomforts of adjusting to a new model -- in order to achieve the longer-term strategic advantages of a more streamlined approach.

*The Proposed Architecture.* The group decided to base its conceptual design on basic federal IPEDS job classifications, using IPEDS guidelines and examples for assignment of titles within those classifications. The second step was to develop supplemental, University System-specific guidelines and examples for positions not fully described by IPEDS definitions alone.

For example, executives & administrators were assigned to the "100" series of the new BCAT classification structure. Within the series, positions were then grouped as

- Senior executive officers
- Institutional & chief functional officers
- Department heads, chairs, & directors

“Other Professionals” were grouped in the 400 series by functional area:

- Academic affairs professionals
- Student affairs professionals
- Institutional affairs professionals
- Fiscal affairs professionals
- External affairs professionals
- Facilities professionals
- IT professionals
- Research & public service professionals
- Health science professionals
- Agriculture, forestry, marine, aeronautics professionals
- Athletics professionals

Within each area, major functional emphases were assigned to categories. So, for example, the Fiscal Affairs professional group contains the following categories:

- 430 Accounting Professional
- 431 Audit Professional
- 432 Finance/Budget Professional
- 433 Materials Management Professional
- 434 Business Operations Professional

Henceforth, positions will be tracked and reported System-wide largely by these category names alone. For example, the authors of this report will all appear simply as “Chief HR Officer” (category 174) for official reporting purposes, despite the fact that each of our campus working titles is unique, as noted on the title page of this report. Individualized titling will be the purview of each campus. The decision to use “Senior Accountant” or “Accountant IV,” for example, will be at campus discretion, based on institutional needs.

## **IMPLEMENTATION**

One major operational challenge was the technical mapping and conversion of existing titles to the proposed new categories. Thirty institutions share a collaborative *PeopleSoft* data system; the other four institutions have either custom legacy data systems or stand-alone versions of *PeopleSoft*.

The work group mapped each of the existing 1,700 titles to a proposed “default” category, creating data tables to simplify the anticipated programming demands. This was intended to enable a relatively straightforward technical conversion and implementation.

The following timetable was followed:

Mar - Oct 2002	Design developed by working committee
Nov 2002	Draft/concept presented to USG human resource officers for feedback
Dec 2002	Technical conversion needs determined
Jan 2003	Structure design “finalized”
Feb-Apr 2003	Presentations & meetings held to gain formal institutional support from affected stakeholders System-wide, including : <ul style="list-style-type: none"><li>• Chief human resource officers</li><li>• Chief administrative/business officers</li><li>• Chief academic officers</li><li>• Institutional research officers</li><li>• EEO/Affirmative action officers</li><li>• IT officers and technical staff</li><li>• University System senior leadership</li></ul>
April 16, 2003	BCAT proposal presented to, and approved by, USG Board of Regents
April – Aug , 2003	IT design & crosswalk from old BCodes to new “BCATS”
June –Aug, 2003	Communicated new model for campus rollouts & trained frontline users at day-long sessions offered around the State.
Aug 27, 2003	New BCAT System went live; BCodes inactivated except for historical purposes
Aug – Oct, 2003	Campus-level “clean-up” to review default assignments & correct as necessary, to make campus changes based on new guidelines, and to create campus-specific subcategories and titles as needed.
Nov, 2003	Effective “capture” date of data for 2003 IPEDS report
Feb, 2004	Reporting deadline for 2003 IPEDS “Fall Staff” and “Employees by Assigned Position” data to NCES

Observations. Job titles seem like a simple thing. But they have tentacles that reach into virtually every aspect of University System operations. They have obvious impact on activities like budget development and payroll administration, but they also serve as key markers for decision-making at all levels, from strategic planning to detailed

operational activities. They are built in to systems that determine benefits eligibility; support academic course load assignment and tracking; serve as the basis for EEO/affirmative action analysis; impact research development and administration; even the bane of every campus's existence: determine parking privileges. Changing a system of job titles – even when most stakeholders hated the existing system – was like “changing the transmission while driving the car down I-75.”

Throughout the process, therefore, efforts were made by the Project Team to keep communication open and flowing among the many stakeholders – at both the central University System offices and at the campuses – whose work would be impacted by this conversion. Various constituents suggested thoughtful design changes and improvements, which were considered and often incorporated by the Project Team.

Even though this was a “technical” conversion, in the sense that a significant data management system needed to be transformed by IT technical experts, the leadership and intimate involvement of experienced functional-side experts cannot be overemphasized. Because the functional purposes and inter-relationships of the data were well understood by the developers, the subsequent technical conversion was virtually seamless. Early post-implementation assessment indicates that “unintended consequences” have been minimal.

## **BENEFITS**

The new BCAT structure for the University System of Georgia will offer

- Time savings and operational efficiencies
- Elimination of campus-based shadow tracking systems
- Enhanced compliance with external reporting requirements
- Streamlined internal tracking for planning purposes
- Improved consistency across campuses
- Flexibility for campuses to meet their unique institutional needs

### Examples.

Because the previous BCode system was so complex and used so inconsistently, the University System previously had been unable to utilize a number of PeopleSoft-delivered reports. Now, campuses that had spent weeks manually evaluating and compiling employee data for annual IPEDS and VETS-100 reporting are able to generate those reports within minutes.

The new BCAT system allows institutions to “customize” their campus working titles and to build compensation programs appropriate to their own competitive job markets – all within the PeopleSoft integrated data management system, rather than in separate shadow systems that had to be independently maintained.

The new BCATs use a logic that groups similar types of positions together by function. As a result, it can be used to streamline the analysis of job groups and career-path positions for Affirmative Action Plan development and reporting.

Academic positions in particular have been grouped into a single series, to which special qualifiers may be attached without creating separate codes. So the 'core' title *Professor* is 200. *Adjunct Professor* is 200B; *Visiting Professor* is 200W; *Research Professor* is 200T and *Professor Emeritus* is 200H. In the past each such title had a separate code, and they were scattered around a master list that was commonly used in alphabetical order.

## **RETROSPECT**

The program implementation has gone remarkably well to date. But the campuses are just now beginning to live with the new BCAT system, and undoubtedly some issues will arise. To reference Deming, "Every solution creates a new problem," and so we already know that new problems will develop. We just don't know what those will be quite yet. Perhaps by the time this presentation occurs, we'll have additional retrospective wisdom to share.