



Montana Operations Manual

Policy

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03-0401

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Issuing Authority

Department of Administration, State Human Resources Division

Broadband Classification Policy

I. Purpose

This policy provides guidelines and requirements for the broadband classification plan according to Sections 2-18-201 through 2-18-209, MCA.

II. Scope

This policy covers all positions in Montana's executive branch except those employed by the Montana university system, the Montana State Fund, the personal staff of elected officials, employees in the blue collar plan, student interns, and any other position specifically excluded under Sections 2-18-103 and -104, MCA.

If these policy provisions conflict with specific collective bargaining agreements, the collective bargaining agreements take precedence to the extent they are applicable.

III. Procedures

The Department of Administration ("department") creates, reviews, and maintains the procedures and standards for classifying positions under the broadband classification plan. The classification method for the broadband classification plan is known as the benchmark factoring methodology.

A. Classification Standards

1. The department shall adopt an effective date for the use of each new or revised classification standard. The effective date of the standard may be retroactive provided the department notifies agencies in writing. Agency managers and human resources personnel may provide input and comment on all new or revised classification standards.
2. Positions under the broadband classification plan must be classified using three standards established by the department. Standards for the broadband classification plan are factor levels, occupational descriptions, and benchmarks.

3. Factor level determines the pay band under the broadband classification policy. Methods for determining the factor level are detailed in the Broadband Classification Manual.
4. Occupational descriptions are established based on criteria from the U.S. Department of Labor's Standard Occupational Classification (SOC) system. Current occupational descriptions are available from the department.
5. Procedures for determining a position's occupation are detailed in the Broadband Classification Manual.
6. The department establishes and maintains written benchmark standards. All classifications must be verified and supported by comparisons to published benchmarks. The department may suspend or retire a benchmark. Suspended or retired benchmarks may not be used for classification purposes.
7. The department shall consult with bargaining representatives before making adjustments to classification standards affecting positions covered by collective bargaining agreements.

B. Classifying Positions

Each position in the broadband classification plan must be classified using procedures and standards outlined in this policy. Positions under the broadband classification plan must be:

- a. properly classified before they are filled;
- b. reviewed regularly to comply with job description standards;
- c. documented and filed with the department.

C. Delegating Classification Authority

The department shall delegate classification authority to agencies demonstrating the ability to carry out the provisions of the plan. Agencies with more than 100 employees must obtain delegation authority. A written agreement between the department and agency shall detail the extent of authority, provide guidelines, and outline procedures. Agencies with delegation authority shall be responsible for:

- a. remaining in compliance with the terms of the delegation agreement, policies, procedures, timetables, and standards established by the department; and
- b. basing classification actions on the recommendations of a trained classifier.

D. Contracting with Consultants

1. Agencies may seek the assistance of a consultant to perform job analyses, write job descriptions and recommend classifications. Consultants providing classification recommendations shall use the department's current classification methodology.
2. Each classification recommendation submitted by a consultant must include the job description, job evaluation, organizational chart, and all supporting information.
3. A trained classifier employed by either a delegated agency or the department shall review and approve all classification recommendations made by consultants before those recommendations can be implemented.

E. Trained Classifiers

The department provides training on the methods used to classify positions. Individuals who meet all training requirements may achieve trained classifier status. To maintain trained classifier status, classifiers shall:

- a. review new standards issues by the department;
- b. participate in training updates; and
- c. remain in compliance with methods and procedures set by the department.

F. Job Descriptions

1. Agency management shall assign the position work and write accurate job descriptions. Managers and supervisors shall update and review job descriptions. Agency classifiers may either assist managers in writing job descriptions, or write the job description for management approval.
2. Agency classifiers who assist managers in writing job descriptions may also classify those job descriptions. Assistance includes:
 - a. reviewing the job description for compliance;
 - b. clarifying wording; and
 - c. grouping tasks.

3. Agency classifiers who write the job description independently may not also independently classify the position. For these job descriptions, the agency classifier shall:
 - a. request that another agency classifier classify the position; or
 - b. request a different classifier or the department approves the agency classifier's evaluation.

G. Reclassifications

1. Reclassification requests must be based on the methods and procedures in effect at the time of the request. Two types of reclassification requests may occur.
 - a. **Change in method** – If a change in method occurs, agency classifiers shall review all affected position classifications. If the change in method results in a change in classification, the effective date of the new classification is the date the new method is applied to the position.
 - b. **Change in position duties** – A manager may request a reclassification due to a change in the duties of the position. When a position is reclassified to a different job code because of a change in the duties and responsibilities, the effective date of the new classification is the date the agency designee signed the reclassification request.
2. Any resulting change in pay is governed by the broadband pay policy (MOM, 3-05-1).

H. Classification Appeals

1. Under MCA 2-18-203 (2), employees and/or their exclusive bargaining representatives may appeal the classification of their position. Employees and/or their exclusive bargaining representatives may not appeal the pay band assigned to occupations or to published benchmarks. The Board of Personnel Appeals, Montana Department of Labor and Industry, sets appeal rules under 24.26.508, ARM.
2. Issues that do not directly affect the position's classification are not appropriate for a classification appeal. These issues may be subject to internal complaint procedures.
3. Awards of retroactive pay as a result of an appeal decision may not exceed the date the agency designee signed the reclassification request. If the agency designee did not sign a reclassification request before the employee files an appeal, awards of retroactive pay may not exceed 30 days prior to the date the employee signed the Employee Classification and Wage Appeal

Form issued by the Board of Personnel Appeals, Department of Labor and Industry.

4. The department shall apply the classification method in effect at the time the appeal is filed unless a review of the classification standard is in progress. The department must complete the review of the classification standard before addressing the appeal.

IV. Resources

- A. State Employee Classification, Compensation, and Benefits MCA 2-18-201 et al.
- B. Classification Appeals, ARM 24.26.501 et al.
- C. The Broadband Classification Manual, Volume III, Methods and Procedures; <http://hr.mt.gov/hrpp/classification.mcpx>
- D. Managerial Decision Tree; <http://hr.mt.gov/hrpp/classification.mcpx>
- E. Benchmarks; <http://mine.mt.gov/personnel/officers/default.mcpx>
- F. Market Analysis and Montana specific Occupational Descriptions – contact Bonnie Shoemaker at bshoemaker@mt.gov
- G. Job Code Inventory – contact Bonnie Shoemaker at bshoemaker@mt.gov

V. Definitions

All definitions under MCA 2-18-101 apply to this policy. The following definitions also apply:

Benchmark Factoring Methodology: A method of classifying work using comparisons to benchmark descriptions, occupational descriptions and job evaluation factors.

Classification: A process of evaluating the work performed in a given position to determine the appropriate occupation and pay band.

Classification Standards: The classification manual including the factor levels, benchmarks and the occupational descriptions that form the basis for the evaluation of the work performed in a given position.

Factor Level: A measure of the complexities of the predominant duties of the position.

Job Code: The unique identifier of an occupation and pay band, used by the department, and based on the U.S. Department of Labor's Standard Occupational Classification (SOC) system, maintained by the Bureau of Labor Statistics.

Job Evaluation: A written decision justifying the classification determination.

Occupational Description: A written standard of the kinds of work performed in a typical position in an occupation. Occupational descriptions provide typical work assignments, common working titles and other information used to describe an occupation.

Standard Occupational Classification (SOC): The SOC is a national job classification system developed by the federal government that lists occupations in which work is performed for pay or profit, and excludes occupations that are unique to volunteers. Occupations are classified on the basis of work performed, with consideration given to required skills, education, training, or credentials.

Trained Classifier: A person who has successfully completed training provided by the department in the application of the benchmark factoring methodology, who has demonstrated the ability to make accurate classification decisions, and who has been placed on the list of approved trained classifiers maintained by the department.