



BROADBAND CLASSIFICATION

Procedure Manual

State Human Resources Division, Department of Administration
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Table of Contents

Preface	1
I. The Benchmark Factoring Method – Position Classification.....	2
A. Classification Principles.....	2
B. Authorized Classifiers.....	3
C. Classification Procedures	4
1. <i>Classification Action Types</i>	5
2. <i>Classification and Reclassification Steps</i>	7
D. Classifying Supervisors, Managers, and Executives	10
E. Classification and Wage Appeals	11
II. The Benchmark Factoring Method – Occupational Standards.....	13
A. Establishing an Occupational Standard	13
1. <i>Criteria for Creating an Occupational Standard:</i>	13
2. <i>Section Descriptions and Instructions</i>	14
B. Modifying or Creating an Occupational Standard	17
References.....	18

Preface

The State Human Resources division (State HR) in the Department of Administration (department) is responsible for developing, implementing, and maintaining a classification system that complies with 2-18-201 through 209, MCA.

- 2-18-201, MCA states, "*The department shall implement and maintain a broadband classification plan for all state positions in state service except those exempt in 2-18-103 and 2-18-104.*"
- 2-18-202, MCA states, "*(1) **Identification of occupations** - In providing for the broadband classification plan, the department shall group all positions in state service into defined occupations based on similarity of work performed, responsibilities assumed, difficulty of work, required knowledge, and required skills.*"

Classification in the broadband system is a human resources process for establishing a hierarchy of work. State HR has established a comparative classification process for the broadband system called the benchmark factoring method (BFM).

Using BFM, classifiers authorized by State HR classify a position by comparing the work of that position to occupational standards. State HR is responsible for creating, updating, and maintaining all standards and procedures.

I. The Benchmark Factoring Method – Position Classification

Authorized classifiers evaluate the work of all broadband positions to determine their appropriate occupation and level. Using the BFM, authorized classifiers:

1. evaluate the work of a position based on the minimum requirements of the job as of the first day of work.
2. focus on characteristics of the position's work, without considering the person doing the job.
3. do not consider the qualifications of an experienced or highly skilled individual who may currently perform the work.
4. compare the work of a position **only** to an occupational standard, and not to an employee or another position.

Comparing a position's work to a classification standard ensures accuracy and minimizes possible distortion within the system. Classifiers shall not classify a position based on an employee's qualifications.

The BFM ensures positions are classified according to 2-18-208, MCA, which requires the department to work toward the goal of establishing a standard of equal pay for comparable worth. The statute states, *"This standard for the classification plan shall be reached by (1) eliminating, in the classification of positions, the use of judgments and factors that contain inherent biases based on sex and (2) comparing, in the classification of positions, the factors for determining job worth across occupational groups whenever those groups are dominated by males or females."*

A. Classification Principles

Accurately identifying the appropriate occupation for a position is essential to classification in the broadband system. To accomplish this objective, classifiers must apply the following principles:

1. Classifiers shall consider the full intent of an occupation when evaluating the work of a position. This requirement means classifying is more than just matching specific words and phrases from a job audit or job description to an occupational standard. Instead, classifiers must fully consider the nature of the work when classifying a position.
2. Classifiers may only classify the essential functions of a position. Non-essential functions are still part of a position's responsibilities; however, non-essential functions shall not be classified¹. Non-classifiable work includes, but is not limited to, temporary assignments, future duties, temporary special projects, and other work deemed non-essential by the position's manager.

¹ Non-essential functions may still be considered for pay purposes – see the Broadband Pay policy.

3. Classifiers shall match at least 70 percent or more of the essential functions to an occupational standard before classifying a position into a job code.
 - a. Some jobs do not have a single duty that is performed 70 percent or more of the total work time. In those cases, the classifier shall combine related duties to determine if work is performed in a single occupation at least 70 percent of the time.
 - b. If the work of a position does not sufficiently match existing occupational standards by 70 percent, the classifier shall classify the position into its appropriate “all other” category. These positions may be “unique” within state government.
 - c. If the position performs work in two or more occupations, with no single occupation performed at least 70 percent of the time, the classifier shall classify the position into the “all other” category most closely matching the minimum requirements of the position. These positions are also known as “hybrid” positions.

State HR monitors unique positions in “all other” categories to determine if enough similarities exist (at least a 70 percent match) among ten or more “unique” jobs to create or modify an occupational standard (see II A. Creating an Occupational Standard).

4. Classifiers shall support and justify their decisions with documented work examples, except when classifying newly created or repurposed positions or during classification transition. (See Section I. C. 1. Classification Action Types, page 5, for procedures related to newly created or repurposed positions. Refer also to Section I. C. 2. C. Documentation, page 9.)

B. Authorized Classifiers

All broadband positions described by 2-18-201, MCA, shall be classified, reclassified, or transitioned by authorized classifiers. Non-authorized classifiers, employees, or managers shall not classify, reclassify, or transition positions. The list of approved, authorized classifiers is maintained by State HR.

Authorized classifier status is established by the Broadband Classification policy. This policy states, *“The Department provides training and assessments for the methods used to classify positions. Individuals who meet all training requirements and successfully pass the classification assessment may achieve authorized classifier status.”*

To become an authorized classifier, a candidate must complete the following:

1. Complete two classes: classification basics and writing job descriptions.
2. Complete at least two classification exercises under the mentorship of a designated, authorized classifier, appointed or approved by State HR.
3. Complete at least five additional classifications under the mentorship of a designated, authorized classifier within six months following the training classification exercises. All actual classifications completed by a candidate shall be reviewed and approved by the designated mentor or by State HR. The approved classifications shall be submitted to State HR. Upon review of the candidate’s work, State HR may require the classifier candidate to edit the job evaluation, provide additional information about the decision, or complete additional classifications.

4. Pass a final exam to demonstrate the applied knowledge of the broadband classification methods. This final exam is administered by State HR.

A classifier candidate may extend his or her mentored training time up to six months (to a maximum of one year) by requesting an extension from State HR. If the classifier candidate does not complete all requirements within one year from the first training date, the classifier candidate will be required to complete the Classification Basics class again, may be required to complete mentored classifications, and may be required to again complete the final exam.

Authorized classifiers must maintain their status according to the requirements of the Broadband Classification policy.

Classifiers who review or approve any classification change assume responsibility for ensuring accurate classification for the position. State HR audits classification actions to determine compliance with policies and procedures as required by policy and the classification manual. During a classification audit, State HR reviews:

- a) documentation, as described by Section I. c. 2. c. Documentation, page 9,
- b) classification and reclassification procedures described in this manual, and
- c) the accuracy of the classifier's decision.

State HR periodically reviews the list of authorized classifiers and removes inactive classifiers or classifiers who violate the policies and procedures established by State HR. An individual who chooses to regain his or her authorized classifier status must complete additional training, pass an assessment, and demonstrate compliance with broadband policies and procedures established by State HR. State HR reserves the right to refuse reinstatement of authorized classifier status based on non-compliance.

C. Classification Procedures

Classification may only be performed by an authorized classifier. To classify a position, you need the following:

Broadband Classification Manual: This document provides descriptions, procedures, and other important information used during classification.

Job Code List: Usually contained in the market rates spreadsheet, this list provides available job codes and titles for broadband classification.

Occupational Standards: This written description, also known as a classification standard or benchmark, identifies the type of work performed in a typical position. Standards include the number of levels, minimum requirements, competencies², and distinguishing factors for the occupation. Classifiers

² Competencies in an occupational standard are not used for position classification. They may be used for recruiting and performance management only.

compare work from a position to information in an occupational standard to form the basis for classifying a position into a job code.

Supporting Documentation: Each decision by a classifier must be supported with appropriate documentation. Appropriate documentation includes, but is not limited to, the following:

1. job evaluation;
2. organizational chart;
3. job audit, work examples, or other descriptors of the work; and
4. classification requests.

1. Classification Action Types

Positions may be classified or reclassified according to the provisions in the Broadband Classification policy and this manual. Classification actions are initiated by agency managers or agency human resources staff. The following types of classification actions may occur:

- a. **New Classification:** This type of classification may occur when a position is newly created following a legislative session or as the result of grant funding. The agency creates the new position in the SABHRS system, assigns a job code, and submits a Budget Change Document (BCD) to the Office of Budget and Program Planning (OBPP). This job code assignment is not considered classification. The OBPP receives the agency's request for an FTE, approves or denies the FTE request, and notifies the agency of its decision.

Approved FTE requests: An authorized classifier must classify a new position before it is filled using the procedures found in Section I. C. 2. Classification and Reclassification Steps, page 6. However, the classifier is not required to have work examples confirming the position's tasks before classifying the job. The classifier must complete documentation about a new position's work within 90 days after it is filled to confirm the position is accurately classified. The classifier shall revise the initial classification within the 90 days after it is filled if the work documentation does not confirm the classifier's decision. The classifier will also document in the job evaluation and notify the supervisor that the classification will be reviewed after one year to ensure the work is still being performed as anticipated. If, after one year, the classifier finds the position is inaccurately classified, the classifier shall correct the position's classification by notifying State HR and documenting the correction.

- b. **Repurposed Position:** When the purpose of a position changes, an agency may change the position's classification. These positions for classification purposes may be treated like a new position. Examples of reasons why an agency may repurpose a position include reorganization, budget considerations, new legislation, new responsibilities assigned to an agency or work unit, or other management needs.
- c. **Reclassification:** Classification for filled or vacant positions may change based on the requirements established in the Broadband Classification policy. This classification action is the most common and usually occurs based on changes to a position's work. Follow the steps described below in 2. Classification and Reclassification Steps.

- d. **Reclassification Transition** – Reclassification can also occur based on changes to classification methods or revised classification standards. During a reclassification transition, a position’s work does not change. A classifier may rely on existing support documentation as the basis of the classifier’s classification decision if the position’s documentation is current and accurate. A classifier records this type of reclassification decision electronically using a form or memo to the agency’s classification file.

If, during a reclassification transition, a classifier discovers a position’s work has changed or the current classification is inaccurate, the action is no longer considered a reclassification transition. It is considered a reclassification, as found in Section c of this part. The classifier shall follow the classification steps described below in 2. Classification and Reclassification Steps.

- e. **Review:** A classifier may receive a request to review or change an existing classification of a filled or vacant position but, after completing the classification steps, determines no change in classification is warranted. If the classification does not change and an accurate job evaluation exists, the classifier **shall not** complete another job evaluation. Classification reviews may be addressed through an email or memo to the position’s file. A classifier must retain the documentation supporting the classifier’s decision in the agency’s classification files according to records retention requirements.
- f. **Career Ladders:** Agency-specific career ladders may include multiple positions with differing work occurring at differing levels or in differing occupations. Classifiers evaluating the work for positions in a career ladder must complete a separate job evaluation for each level and differing occupation in a career ladder. Positions in the agency career ladder do not have job evaluations separate from those in the career ladder.

Agencies must track the appropriate classification designation and career ladder level for each position in the career ladder. If a position number is reorganized or repurposed outside of the career ladder, an authorized classifier shall perform a new job evaluation as described in Sections a. New classification or b. Repurposed Position.

The classifier may document his or her approval or denial using a memo or email to the position’s file. The classifier authorizing a reclassification must obtain and file the manager’s reclassification request. The documentation must reference the career ladder’s relevant occupational standard, job evaluation, job code, date of the effective job evaluation, and author of the effective job evaluation in the approval memo. A classifier may request one or more work examples to confirm the position is performing the work required by the occupational standard or a level within the standard. The classifier may deny reclassification career ladder movement if the work of the position does not meet the requirements of the occupational standard or level within the standard.

Movement along a career ladder that does not result in a job code change is not covered by the classification procedures in this section. The Broadband Pay policy, an agency’s pay policy, and/or collective bargaining agreements provide procedures and requirements related to pay movement within a career ladder.

- g. **Disputes within an Agency:** An authorized agency classifier with responsibility for reclassifications in his or her agency may disagree with the evaluation provided by a different classifier in the same agency. Classification disagreements between an agency's authorized classifiers may be escalated to State HR. State HR will provide a written response detailing its decision. State HR's final classification decision is binding when resolving classification disagreements between an agency's classifiers.

2. Classification and Reclassification Steps

The BFM requires complete job analysis, which involves three basic steps: job audit, job evaluation, and documentation. **Job audit** means collecting information about the position through the job description and other sources, such as work examples or documented responses about the work from the supervisor and incumbent. **Job evaluation** means applying BFM to determine the appropriate level and occupation for a job. **Documentation** is the classification request, the written job audit, the completed form containing the classifier's job evaluation decision, and any other supporting documentation.

- a. **Job Audit** – Before evaluating a job, a classifier gathers information about the work of the position, while considering the minimum requirements (including any statutory requirements) of the job as of the first day of work (Note: new and repurposed classifications have different procedures. See Sections I. C. 1. (a) and (b), page 5). The job audit must contain work examples that support the major duties of the job.

An organizational chart is a required component to complete a job audit. The classifier must use the appropriate combination of methods for gathering job-related information according to the type of work performed in the job. For example, a classifier may perform a desk audit for some types of manual or repetitive work, but this method may not be appropriate for other types of work, such as when gathering information about hazardous duties or when auditing jobs that require creative outputs. Methods used for gathering information in a job audit may include the following:

- i. Questionnaire or written job audit questions,
- ii. work samples,
- iii. procedure manuals used to direct the employee,
- iv. desk audits (direct observation of the work of a person currently in the job),
- v. requirements set by statute, grant, contracts, or other legal regulations,
- vi. information about work performed by similarly situated positions,
- vii. time studies or daily logs,
- viii. follow-up questions (if needed).

Because a manager is responsible for assigning work to his or her employees, classifiers shall verify the information gathered from the job audit with the manager of the position to confirm work expectations. When the manager's expectation for the job differs from the employee's understanding of the job duties, information from the manager takes precedence when determining the classification.

b. **Job Evaluation** – Authorized classifiers consider all relevant information gathered during the job audit when classifying a position. Classifiers shall not justify a position’s classification by comparing to the work of another position. All positions must be evaluated by comparing the position’s work to occupational standards. A classifier follows these steps to classify a position:

- 1) Review the purpose of the position and compare it to the purpose of an occupational standard (see the first classification principle in Section I. A. 1. Classification Principles, page 2). Proceed to the next step only if the purpose of the work matches the purpose of the occupational standard. Do not classify the position into the occupational standard if the purpose of the work does not meet the intent of the standard.
- 2) Compare any statutory requirements* and typical requirements of the occupational standard or level to the minimum requirements of the position. State HR maintains a list of occupations with statutory requirements. You may refer to this list when comparing the work to an occupational standard with statutory requirements.

*Note – If an occupational standard or level has statutory requirements, do not classify the position into that occupational standard or level unless the position’s work and minimum requirements meet statutory requirements. For example, do not classify a position as a doctor unless the position’s work requires and includes a license to practice medicine; do not classify a position as an aircraft pilot unless the work requires and includes a pilot’s license, etc.

- 3) Identify whether each major duty in the position is an essential function of a job (see classification principle two in Section I. A. 2. Classification Principles, page 2).

*Note – Classifiers have additional considerations when evaluating essential functions for supervisors, managers, and executive positions (see pages 10-11, Section I. D. Classifying Supervisors, Managers, and Executives).

- 4) Identify the percent of time performed for each essential function in the job.
- 5) After confirming the work of the position matches the purpose of the occupational standard and meets any legal requirements, compare the essential functions* of the position to the occupational standard by performing a task analysis (see classification principle three in Section I. A. 3. Classification Principles, page 3). When completing a task analysis, you may compare the work to any task within the occupational standard. All matching tasks within the occupational standard, regardless of level, count towards the required 70-percent threshold for classifying a position into an occupational standard.

*Note – your job audit provides work examples supporting the position’s major duties for this step. These work examples are required to support a classifier’s decision during new or repurposed classifications, for career ladder classifications, and for reclassifications.

- 6) Each level in a standard has a different job code. If the position meets the 70-percent threshold for a standard, compare the essential functions and minimum requirements of the position to the additional duties and typical requirements of the levels within the occupational standard. If a standard has more than one level, the position’s essential functions must match all of the additional duties of the standards’ higher level before being classified into the higher level. Do not classify a position into a higher level if the work of

the position does not match all the additional duties in that level of the standard. Duties in a higher level of a standard beginning with the word “may” are excepted from this requirement. If the position meets the 70-percent threshold for the standard but not all of the required additional duties of a higher level, classify the position in level one.

If a position has three or more levels, classifiers assign the classification of a position to the highest matching level of the standard. A position’s work does not have to match all duties in an intermediate level before classifying the position into a higher level. For example, if a standard has three levels, and the work of the position matches all required duties for level three, but not all the required duties for level two, classify the work at level three.

- 7) If the position does not meet the 70-percent threshold of the established occupational standard, the position may be classified in the closest “all other” occupational standard in a job family and job function. The closest “all other” occupational standard is found by
 - i. identifying the job family and job function for each essential function of the work,
 - ii. grouping a job’s related essential functions by job family and job function, and
 - iii. choosing the “all other” occupational standard from a job family and job function that meets the 70-percent threshold.
- iv. If the percent of essential functions of a position do not match the 70-percent threshold for a standard but matches two or more “all other” job families or job functions, the position may be placed in the “all other” job family and function containing the highest percent of essential functions.
- v. If the percent of essential functions are equally distributed between two job families or job functions, classifiers shall choose the “all other” category used for recruitment at the agency.

8) Support and document your decision for the classification action type.

- c. **Documentation** – An authorized classifier records the classifier’s decision by documenting the classification request, organizational chart, job audit information, and job evaluation. This documentation is used to explain and justify the rationale behind the classifier’s decision. Documentation is essential during a classification appeal. Documentation will also be used during the classification system’s audit performed by State HR. Documentation may be reviewed periodically for accuracy and updated as needed. A classifier should include the following documentation appropriate for the classification:

- 1) Provide a job evaluation for new classifications, repurposed positions, career ladders, and for reclassifications resulting in a new job code.

*Note – If you are repurposing or reclassifying a position into a job description shared with other positions **and** the work of the shared job description has not changed from the previous classification, do not create a new job evaluation. You may write a memo and reference the applicable job evaluation. Update the job evaluation with the new position number and date. File the memo with a copy of the applicable documentation in the position’s classification file.

- 2) Address process changes, minor task changes, format changes, or changes that do not affect the classification using a job review documented as a memo or letter to the position's file (Section I. C. 1. (e) Review, page 6).
- 3) Reclassification transition, resulting from a change in methodology, follows the documentation requirements found in Section I. C. 1. (d) Reclassification Transition, page 6.

D. Classifying Supervisors, Managers, and Executives

For classification purposes, the following requirements apply when classifying supervisors, managers, and executives:

Supervisors - If an occupational standard includes a supervisor level, classifiers may classify a position at that level of the standard provided the work of the position matches the purpose of the occupational standard, matches the 70-percent threshold for essential functions of the standard, and meets all criteria for the supervisor level of the standard, including the following:

1. The position's primary duty is supervising a customarily recognized department or subdivision of the agency;
2. The position customarily and regularly directs the work of at least two or more full-time employees or equivalent; and
3. The position has the authority to hire or fire employees or the position's suggestions and recommendations as to the hiring, firing, advancement, promotion, or any other change of status of employees are given particular weight.

Managers –These occupational standards are intended for positions that manage and plan resources for a large unit, program, or bureau at organizational levels lower than the top-level executives. These standards have one level. Before classifying an employee into a manager occupational standard, the position must perform management duties at least 70 percent of the time and must perform **all of the following duties**:

1. Regularly manage (hire, fire, manage performance, assign work, coach, etc.) at least five employees (use an organizational chart to identify employees directly or indirectly reporting to the position) within the reporting structure (indirect reports in other units of a structure do not count towards the total).
2. Managed employees are represented by at least two different occupations (you may review the occupations for positions using an organizational chart).
3. Provide operational management functions authorized by executives, including allocate staffing resources; plan for and manage office, IT, and other approved resources; and provide oversight for project and program resources.
4. Manage budgets within authorized thresholds established by executives and the legislature.

Executives – These occupational standards are intended for manager positions providing **top-level** decisions for the agency or a division. Executive occupational standards include one level. Before classifying an employee into an executive occupational standard, the position must perform strategic,

high-level management at least 70 percent of the time, as described below. **All of the following duties** are required for executives:

1. Regularly manage (hire, fire, manage performance, assign work, coach, etc.) at least five employees (use an organizational chart to identify employees directly or indirectly reporting to the position) within the reporting structure (indirect reports in other units of a structure do not count towards the total).
2. Managed employees are represented by at least two different occupations (you may review the occupations for positions using an organizational chart).
3. The position performs strategic, high-level management functions, including the following:
 - a) Directly responsible for reorganizations within the division or bureau.
 - b) Write, plan, or request proposed legislation, find legislative bill sponsors, or testify about proposed legislation.
 - c) Present the budget for their division and programs during a legislative session or to legislative subcommittees, testifying as necessary.
 - d) Authorize budget expenditures, personnel changes, and other resources approved during legislative sessions.
 - e) As an administrator or bureau chief, provides a division's response to legislative audits.
 - f) Determines the long-term strategic work plan for the division or bureau.

Some occupations do not include a manager level. If an occupational standard does not include a manager level, the position may still be classified in that occupational standard if at least 70 percent of the work matches the occupational standard. Managers classified in a non-manager occupational standard may have their managerial work recognized by pay, depending on an agency's pay policy (see the Broadband Pay policy).

Lead Workers or Supervisors of Less Than Two FTE – Supervisors of less than two FTE or lead workers are not classified into an executive standard, manager standard, or the supervisor level of an occupational standard. Some occupational standards may include some supervisory or lead duties within a regular level. If the occupational standard does not require any supervisory or lead duties, this type of work may be recognized with pay, depending on an agency's pay policy (see the Broadband Pay policy).

E. Classification and Wage Appeals

Employees have the right to appeal their broadband classifications and wages, as provided by 2-18-203 (2), MCA. Managers do not have the right to appeal their employees' classifications. It is the agency's human resources office or designee's responsibility to provide information to employees upon request about the appeal process, the classification system, or classification procedures. Agencies may request assistance from State HR when providing such information to employees.

Agencies investigate classification and wage appeals at step one, as described by ARM 24.26, part 5. Agencies with delegated authority provide a formal response for classification and wage appeals at step

one. Agencies without delegation authority may contract their classification and wage appeal at step one to an authorized classifier in another agency, to an authorized classifier consultant, or the appeal may move directly to step two at State HR. Agencies may consult with State HR about appeal procedures during step one of a classification and wage appeal.

II. The Benchmark Factoring Method – Occupational Standards

State HR established a comparative method for classifying positions called “Benchmark Factoring.” In Broadband, benchmark factoring means classifying positions by comparing the work of a position to an occupational standard authorized by State HR. All broadband positions must be classified using an occupational standard according to the procedures in Section I. The Benchmark Factoring Method – Position Classification.

A. Establishing an Occupational Standard

State HR classifiers are responsible for establishing occupational standards as described in this part. State HR may also work with other authorized classifiers when establishing an occupational standard. State HR or authorized classifiers may additionally request information from managers, subject-matter experts, or union representatives for affected occupations during this process. However, State HR must authorize all occupational standards before the standards become final.

State HR posts occupational standards for comment and provides an opportunity for feedback before finalizing occupational standards. State HR notifies authorized classifiers, agency human resources staff, and union representatives when posting a standard for comment. Notifying these interested parties meets the requirements at 2-18-203 (1), MCA, and the Broadband Classification policy, which requires State HR to consult with representatives of the collective bargaining unit for affected employees when establishing or revising an occupational standard.

State HR may reject or modify a proposed occupational standard. Reasons for rejecting or modifying a proposed occupational standard include, but are not limited to, the standard:

1. Failing to meet the criteria described below in Section II A. 1, “Criteria for Creating an Occupational Standard”;
2. Being too long or containing detailed tasks or processes;
3. Being exclusive (describes individual positions rather than provides an occupational description);
4. Providing barriers to equal employment opportunity;
5. Duplicating or being indistinguishable from another standard;
6. Describing hybrid or unique work.

Once an occupational standard is finalized, no further change may occur to the standard except as established by State HR during the standard’s formal review window (see Section II. B., page 16, Modifying or Creating an Occupational Standard).

1. Criteria for Creating an Occupational Standard:

State HR requires the following criteria when establishing each occupational standard:

- a. Salary survey data from one of State HR’s salary survey sources must be available before creating an occupational standard. State HR will not create a new occupational standard if insufficient salary survey data exists.

- b. Occupational standards are intended to describe an occupation rather than a single position. While an agency or a manager may adopt an occupational standard as a job description, requests for new or modified standards should limit position differences (if any) to the supplemental section, rather than include them in the occupational standard.
- c. Generally, State HR will not create an occupational standard for less than ten people unless it determines it is reasonably necessary.
- d. Each occupational standard must contain an O*Net code and title. State HR will not create an occupational standard without an O*Net code.
- e. If an occupation has statutory requirements, an occupational standard must include those statutory requirements at the appropriate level.
- f. Each occupational standard is intended to be unique. State HR will not create a new occupational standard unless the description is clearly distinguishable from other standards.
- g. Each occupational standard is limited to the requirements described below in Section II A. 2. Section Descriptions and Instructions.
- h. After phase one transition, State HR will only create or modify an occupational standard during the review window for the occupation's job family.

2. Section Descriptions and Instructions

When creating an occupational standard, follow these instructions and requirements:

Job Code Title: The official title of an occupational standard should be a common description understood by those in the occupation. No more than three levels (excluding apprenticeship or management levels) may be created for an occupation. Exotic or position-specific titles are not appropriate for an occupational standard's title. Fewer words are usually better. Refer to O*Net, job-seeker sites, or other state websites to help identify common titles.

- a. **Job Code, Title, and Levels:** Determine the appropriate number of levels for an occupational standard. Each level in an occupational standard has its own job code and job code title. The first three numbers of each job code in the revised broadband structure begin with the O*Net sub-functions existing in SABHRS. Each job code ends with the level of the occupational standard. Additional coding is assigned by State HR.

Not all occupational standards include all levels, but may follow the pattern below:

- i. B13XXA = apprenticeship level for certain occupations with statutory requirements or recognized apprenticeships, often lasting longer than one year (for example, a civil engineer-in-training job may last two or more years; apprenticeships in certain skilled trades may last multiple years, etc.).
- ii. B13XX1 = level 1 of the occupational standard
- iii. B13XX2 = level 2 of the occupational standard
- iv. B13XX3 = level 3 of an occupational standard
- v. B13XXM = a supervisor level of an occupational standard (must manage at least 2 FTE and be aligned with the requirements for management found on Section I. D., page 10,

Classifying Supervisors, Managers and Executives). Some occupations will not include supervisor levels (for example, paralegals are typically supervised by lawyers; health care aides are typically supervised by nurses or medical professionals).

- vi. A13XXB = a manager occupational standard (must manage 5 employees in multiple occupations and perform operational management 70 percent of the time as described on Section I.D., page 10, Classifying Supervisors, Managers, and Executives) not included with other occupational levels.
- vii. A33XXE = an executive occupational standard (must manage 5 employees in multiple occupations and perform strategic, top-level management 70 percent of the time as described on Section I. D., pages 10-11, Classifying Supervisors, Managers and Executives) not included with other occupational levels.

Levels defined in an occupational standard do not preclude an agency from establishing additional levels or pay rates in an agency's internal career ladder, as described by an agency's pay policy or collective bargaining agreement.

O*Net Code: State HR will identify the appropriate O*Net code. The O*Net code is used when creating a job code and for reporting purposes (for example, EEOC reporting).

Purpose of the Job: Summarize the purpose of the job by creating a statement (between one and three clearly written sentences) describing the occupation. Duty statements and process details are not allowed in this section. The purpose should describe an occupation occurring in Montana state government, not a specific position.

Tip: Check the O*Net and the Occupational Outlook Handbook for ideas when creating a statement for this section.

Representative Duties: Create bulleted duty statements commonly found in all levels of an occupation. Typically, five to seven duty statements should be included in order of importance. Do not exceed 10 representative duties. These duty statements should **not** contain processes or detailed information about how to perform the duty. A set of representative duties must be unique to an occupation; they shouldn't exist in another occupational standard. Representative tasks are not intended to be all-inclusive for a position. Fewer representative duties are more inclusive.

When using an occupational standard as a job description, position-specific duties may be included in the differing work section for the job description, as long as the additional position duties do not exceed 30% of the work.

Tip: Check the O*Net and the Occupational Outlook Handbook for ideas when creating duties for this section.

Level Information: Provide the minimum requirements, additional duties, and supporting competencies³ for each level. These requirements should differ by level. If no difference exists with additional duties **and** minimum requirements **and** competencies for a level, **DO NOT** create an additional level. Each level must contain the following:

- a. **Title:** Choose an appropriate title for each level (managers have specific requirements – see pages 10-11, Classifying Supervisors, Managers and Executives) as required by Section II. 2. Page 14, Job Code, Title, and Levels.
- b. **Typical Qualifications:** Provide typical qualifications for the first day of work supporting the occupation at each level, including any statutory requirements (if applicable). Typical qualifications should align with the occupation and be different at each level. See the Occupational Outlook Handbook for typical qualifications.

Some occupations have statutory requirements. Refer to Montana statute when describing requirements for occupations or levels with statutory requirements.

- c. **Core Competencies⁴:** Best practice indicates an occupation should have between three to seven competencies (averaging five competencies). Identify differing competencies at each level. Some occupations and levels may have fewer competencies (example: file clerk occupations may only need three competencies); other occupations may have more competencies (high-level managers may need seven competencies). If more than seven competencies are identified, you may prioritize the competencies and choose **no more** than the top seven. The total number of competencies may be cumulative with other levels but may **not** exceed seven competencies. The following describes each competency category:
 - i. **Knowledge** - a body of information applied directly to the performance of an essential function (knowledge of...)
 - ii. **Skills** - the manual, verbal, or mental manipulation of data or things (skilled at...)
 - iii. **Abilities** – the capacity to perform an activity or task (able to...)

Note: Competencies are included in an occupational standard for recruitment purposes and performance management **only**. Competencies are **not** considered during the classification of a position.

Tip: Check the Occupational Outlook Handbook for competencies related to an occupation and modify as appropriate for Montana broadband occupations.

³ Note – competencies were not required for occupational standards as of March 2019.

⁴ Note – as of March 2019, competencies were not required when creating occupational standards.

- d. **Additional Duties:** Provide clearly stated additional work distinguishing one level of an occupation from another. Include at least two different duties per level. Since all duties are needed to qualify for a level, remember to carefully select the appropriate number of additional duties before completing each level. Do not exceed seven additional duties per level.
- e. **FLSA status:** Choose the typical FLSA status for an occupation at that level. This status will be reflected on the job code table. FLSA requirements apply to this field.

Additional Information: Each occupational standard should contain the following additional information about an occupation:

- b. **Distinguishing Factors:** Describe differences in commonly confused occupations and include any factors or characteristics that help to differentiate this occupation from other occupations. If the occupation is not distinguishable from other standards, the standard will not be created.
- c. **Other Important Information (including physical and mental requirements):** This section may provide typical working conditions, physical and mental requirements, or other important information about the occupational standard not found elsewhere.

B. Modifying or Creating an Occupational Standard

(Note – this section applies after phase I reclassification transition. See the Broadband Classification policy for more information.)

State HR periodically reviews occupational standards according to 2-18-203 (1), MCA. This statute states, “2-18-203. **Review of positions.** (1) The department shall review the job evaluation factor of positions on a regular basis and may adjust the occupations for the positions to reflect significant changes in duties and responsibilities.”

Each occupational standard is classified into an O*Net job family. An occupational standard’s job family is identified by the first letter of the job code. State HR establishes and maintains a review schedule for occupational standards based on job family. State HR may revise, create, retire, or reject a request for an occupational standard during its review window. State HR will not revise, retire, or create an occupational standard outside of a job family’s review window.

State HR determines whether an occupational standard is created or revised by:

1. Reviewing descriptions for positions classified in “all other” occupational standards within the job family.
2. Considering requests made by interested persons during a review window for new or modified occupational standards.
3. Reviewing O*Net updates and revisions.
4. Considering the criteria for new or revised occupational standards outlined in Section II. A. 1. Criteria for Creating an Occupational Standard.
5. Considering other needs benefiting Montana state government.

Proposed new or revised occupational standards will be posted for comment as described by Section II A. Establishing an Occupational Standard.

Once a standard is authorized by State HR, occupational standards are not subject to appeal. This status is provided according to 2-18-203 (2) MCA, *“Classification standards are not appealable subjects under 2-18-1011 through 2-18-1013.”*

References

1. Broadband Classification policy
2. Broadband Pay policy
3. Classification and Wage Appeal (ARM 24.26.508)
4. Occupational Standards
5. Occupational Standard Template
6. Occupational Standards Review Schedule