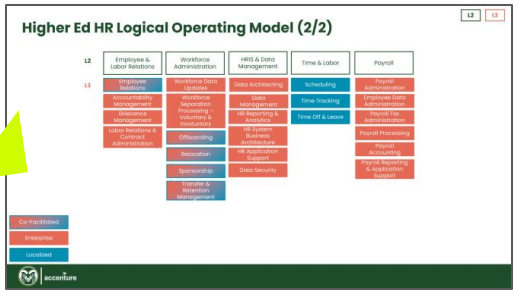
HR and Finance Alignment Initiative **Blueprints**

Updated as of 2/18/2026

What is a Blueprint?

*In Phase 1 (Fall 2025), you may recall seeing high-level **Blueprints.***



The **Blueprints** are technically called **Logical Operating Models (LOM).** They are high-level maps of all the work done in the HR and Finance functions.

The Blueprints

1. document all functions
2. show how functions are grouped, organized and fit together to support the university's goals.

They are **future-focused,** but they are informed by the work currently done today, too. They serve as the foundation for designing the future operating models and organizational designs.

They are not org charts and do not describe individual roles or who performs what tasks. It helps us see how different types of work connect and where responsibilities sit at a high level.

The **Blueprint** is designed to:

- Provide a clear, structured view of what work the organization performs
- Show how core services and support functions interact
- Help align their operations with strategic goals and objectives.

The scope of Logical Operating Modeling Blueprint:

Definition

The Blueprint is a structured, data informed way to think about how the work could be organized in the future.

The Blueprint **does**...

- Conducted function by function; decisions made by one function do not necessarily impact decisions in another function
- Document the type of work that is being performed within the function
- Explore options for how and where work will be conducted throughout the organization
- Focus on future possibilities

The Blueprint **does NOT**...

- Decide individual reporting lines or who reports to whom.
- Measure how people spend their time.
- Represent how work is currently organized.

A blueprint **is not an organizational chart.**

Blueprint Key

Color coding indicates who is accountable for outcomes and is not necessarily a complete picture of who all contributes to work for a given function. Even if a function is color-coded one way, activities within the function may ultimately reflect some local, co-facilitated, and enterprise level work.

Levels

Level 1 (**L1**) = either Human Resources (HR) or Finance (FIN)

Level 2 (**L2**) = high-level function of work

Level 3 (**L3**) = set of activities within a L2

Level 4 (**L4**) = detailed activities with brief descriptions of the work.

Enterprise

- Owned within an enterprise team
- Sets strategy and direction for teams who may execute
- Accountable for outcomes for capability

Co-Facilitated

- Shared between enterprise and localized teams
- Work activities are collaborative
- Accountability can vary between enterprise and localized teams for outcomes for a capability

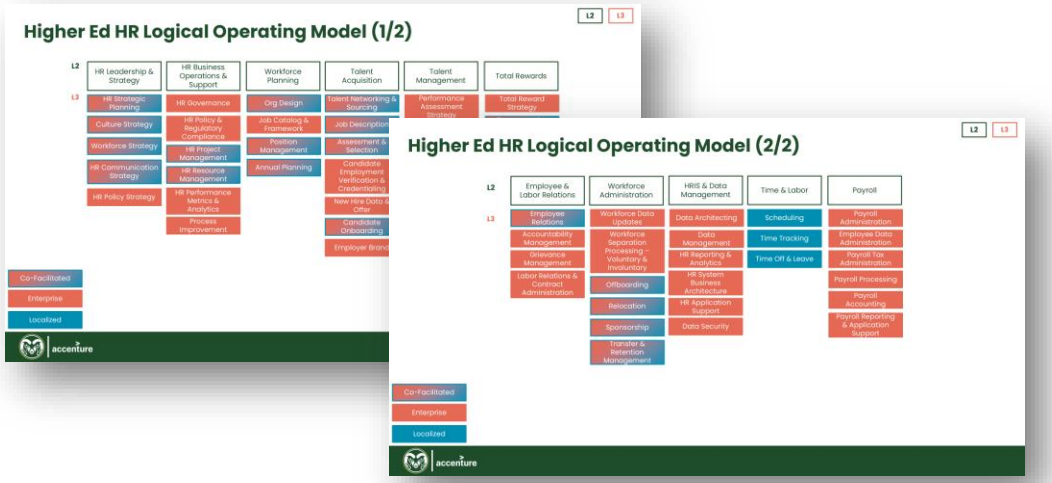
Localized

- Owned locally, often due to knowledge living within college /division
- Accountable for outcomes for capability
- Enterprise sets strategy, supplies templates and guidance

Process To Develop Blueprints (Logical Operating Models)

Phase 1: High Level Draft

- We started with a Higher Education model based on expertise and from our consultant partner Accenture.
- Next, we refined based on CSU's HR and Finance Alignment initiative objectives and was informed by leading practices observed at other higher education institutions.
- A series of workshops and interviews with the Alignment Advisory Committee and subject-matter experts further refined the draft Blueprints. They were encouraged to think boldly beyond current constraints and challenges and to consider where the function aspired to be in the future.
- These materials were created and shared in August and September 2025.



Phase 2: Design Sessions

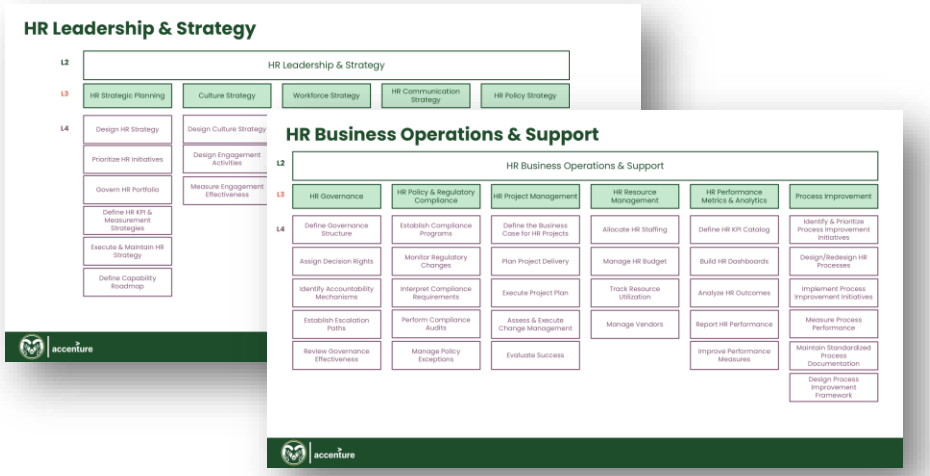
- From October through December 2026, one design session was conducted for each L3-level function, bringing together a cross-sectional group of representatives from across the university.
- Participants reviewed the more detailed activities and definitions, providing feedback on everything from small wording changes to adding net new L3s.

11 HR design sessions:

- 265 Level 4 activities collaboratively developed, engaging more than 70 participants from 18 units across CSU.

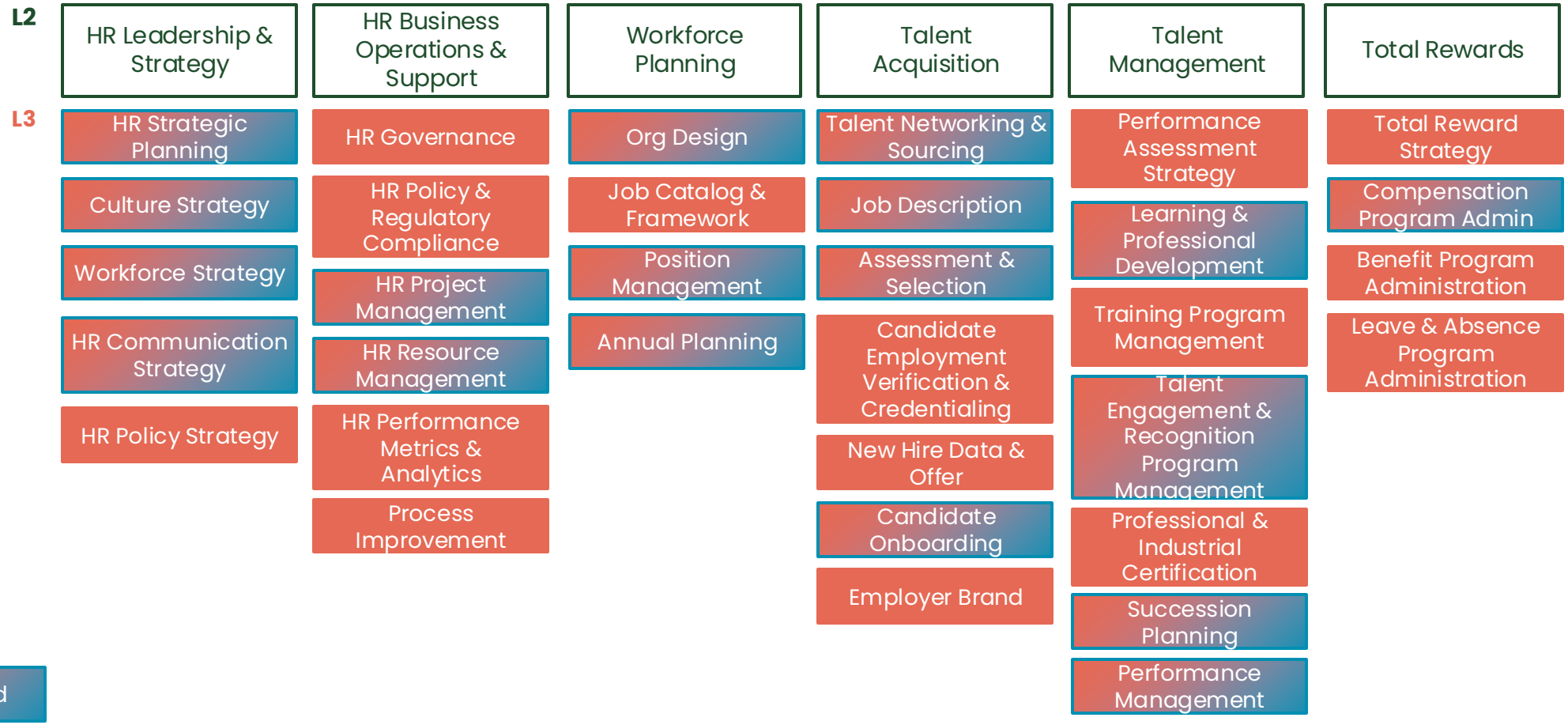
14 Finance design sessions:

- 410 Level 4 activities collaboratively developed
- 97 participants from 25 units across CSU.



L2 L3

Higher Ed HR Logical Operating Model Blueprint (1/2)



Co-Facilitated

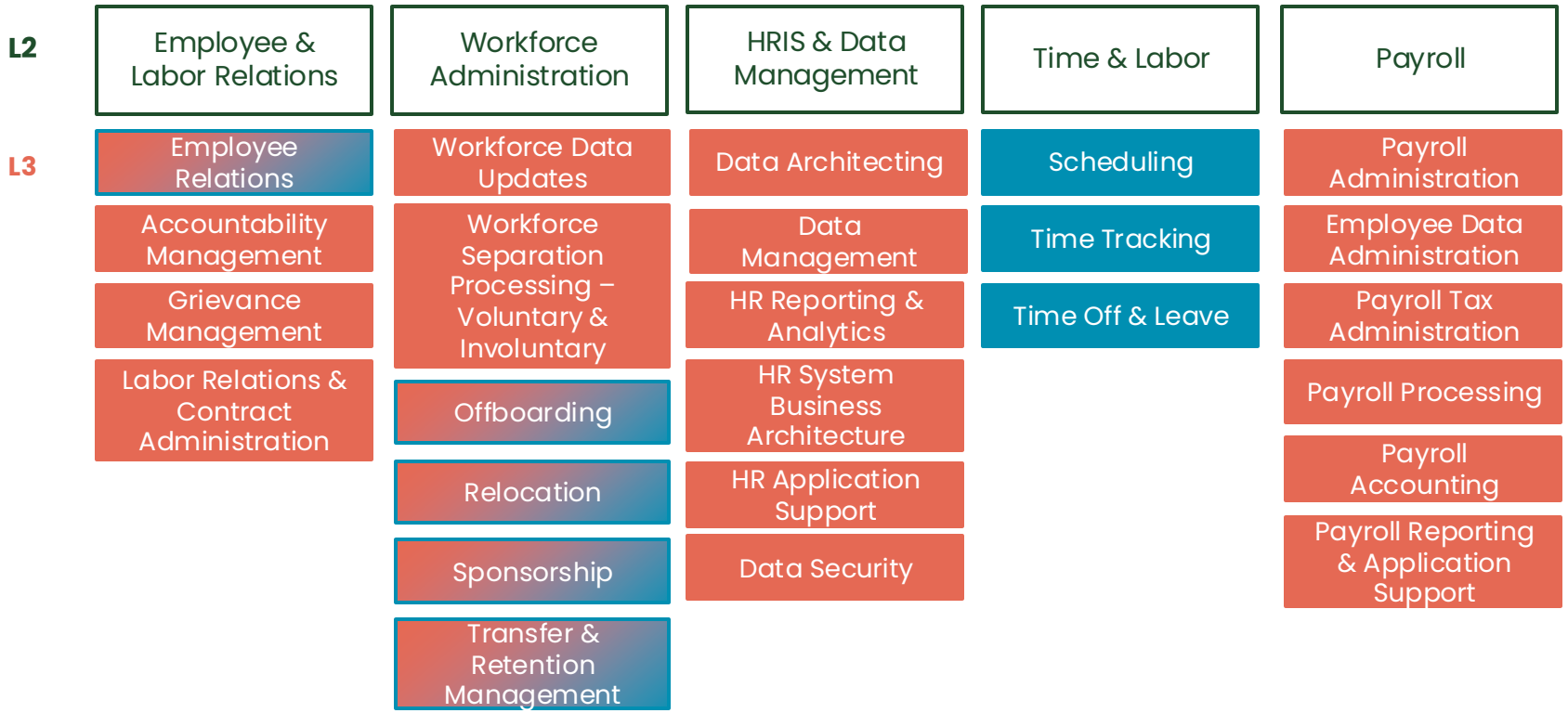
Enterprise

Localized

accenture

L2 L3

Higher Ed HR Logical Operating Model Blueprint (2/2)

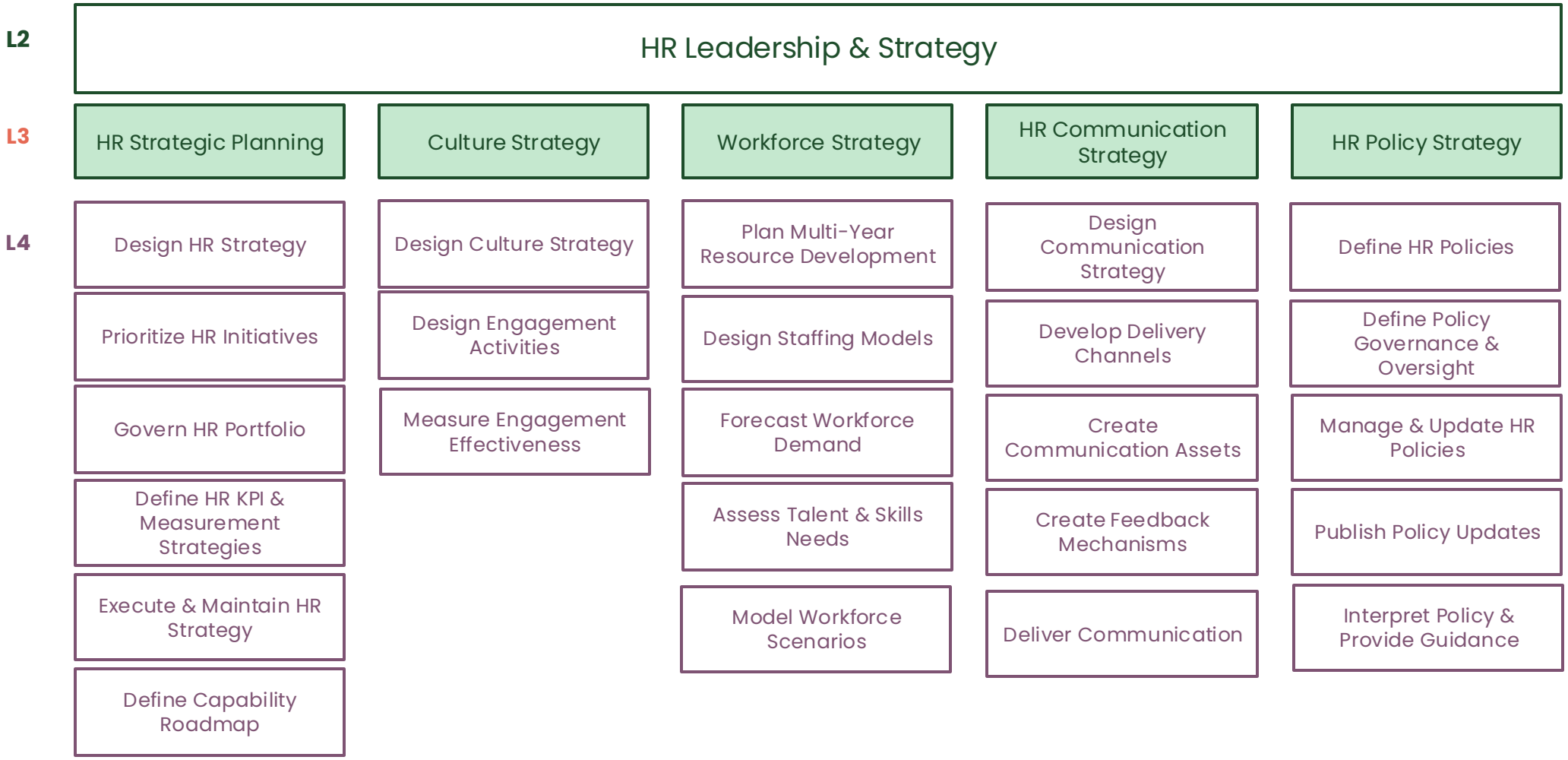


Co-Facilitated

Enterprise

Localized

HR Leadership & Strategy



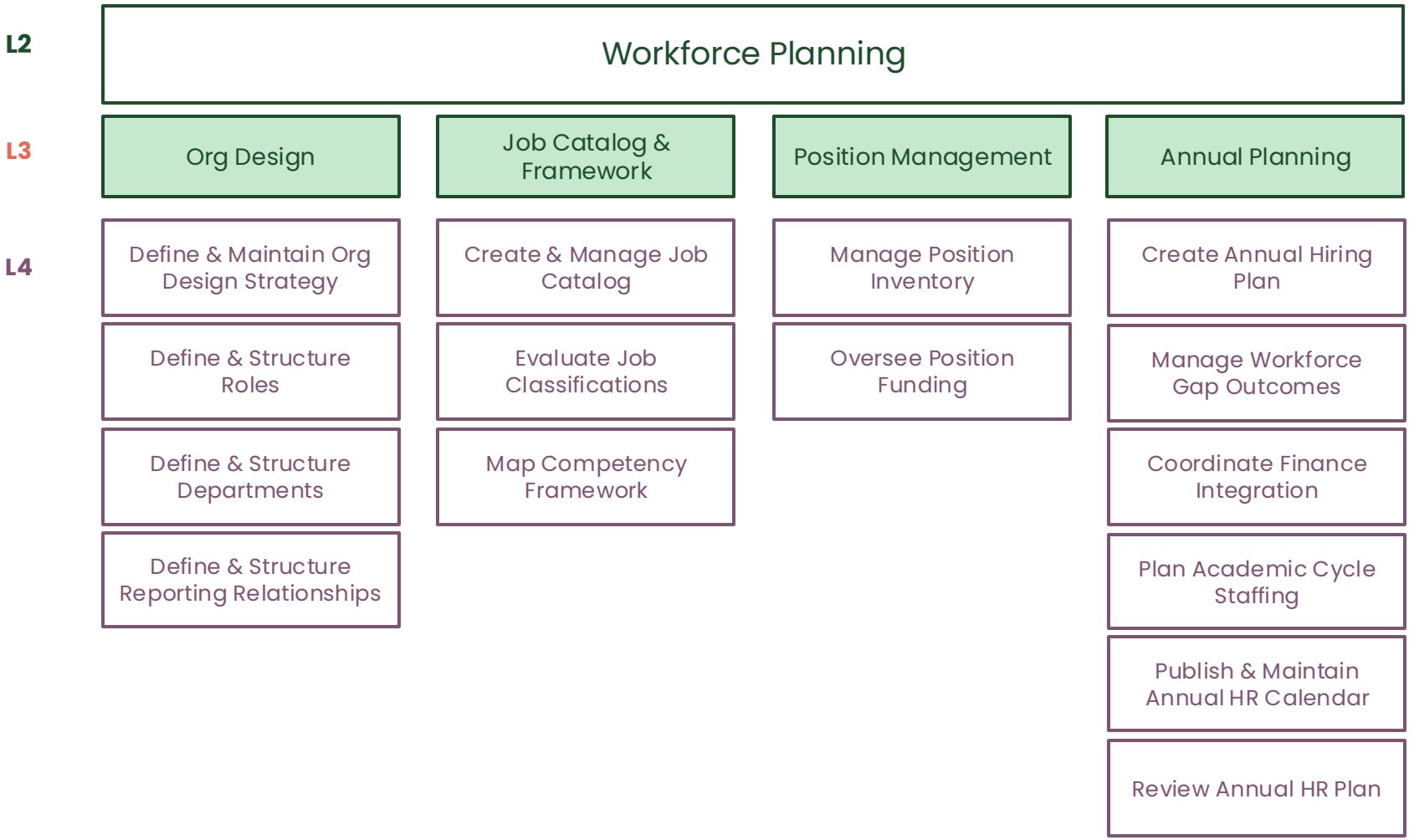
HR Business Operations & Support

L2

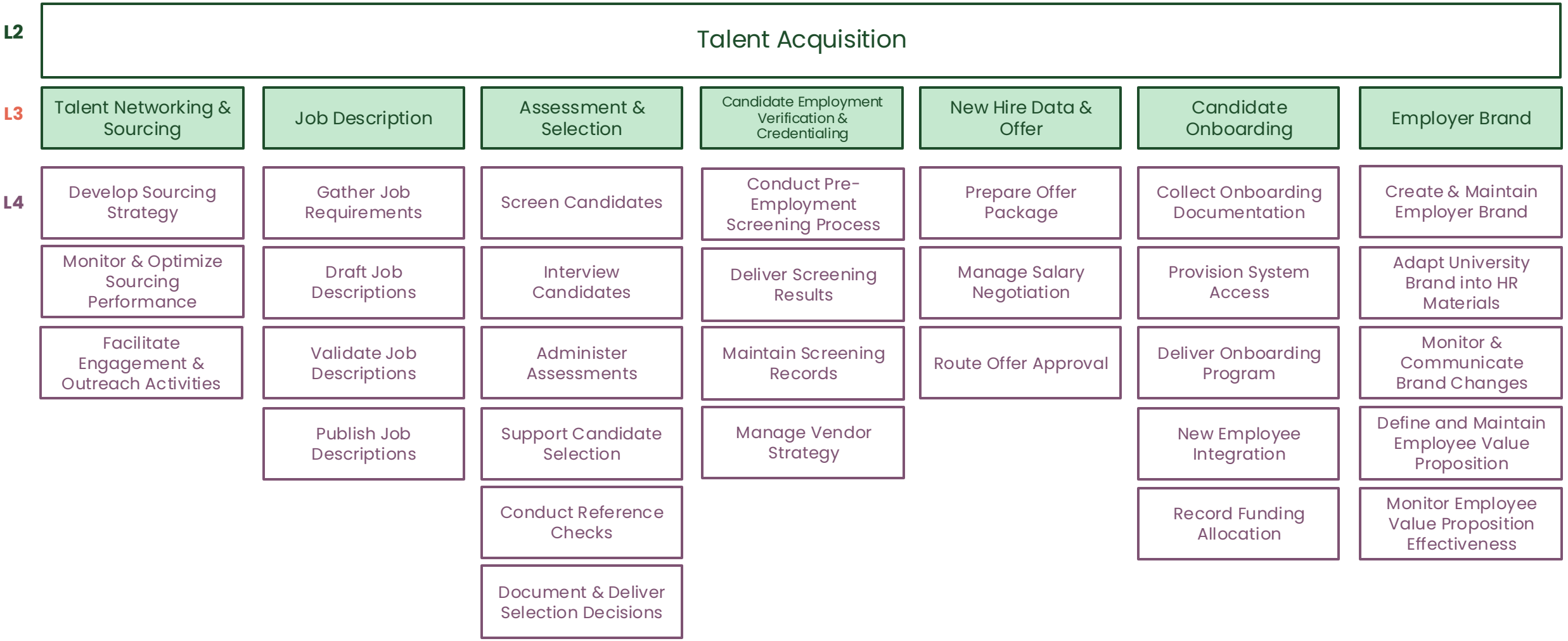
HR Business Operations & Support

L3	L4
HR Governance	Define Governance Structure
	Assign Decision Rights
	Identify Accountability Mechanisms
	Establish Escalation Paths
	Review Governance Effectiveness
HR Policy & Regulatory Compliance	Establish Compliance Programs
	Monitor Regulatory Changes
	Interpret Compliance Requirements
	Perform Compliance Audits
	Manage Policy Exceptions
HR Project Management	Define the Business Case for HR Projects
	Plan Project Delivery
	Execute Project Plan
	Assess & Execute Change Management
	Evaluate Success
HR Resource Management	Allocate HR Staffing
	Manage HR Budget
	Track Resource Utilization
	Manage Vendors
HR Performance Metrics & Analytics	Define HR KPI Catalog
	Build HR Dashboards
	Analyze HR Outcomes
	Report HR Performance
	Improve Performance Measures
Process Improvement	Identify & Prioritize Process Improvement Initiatives
	Design/Redesign HR Processes
	Implement Process Improvement Initiatives
	Measure Process Performance
	Maintain Standardized Process Documentation
	Design Process Improvement Framework

Workforce Planning



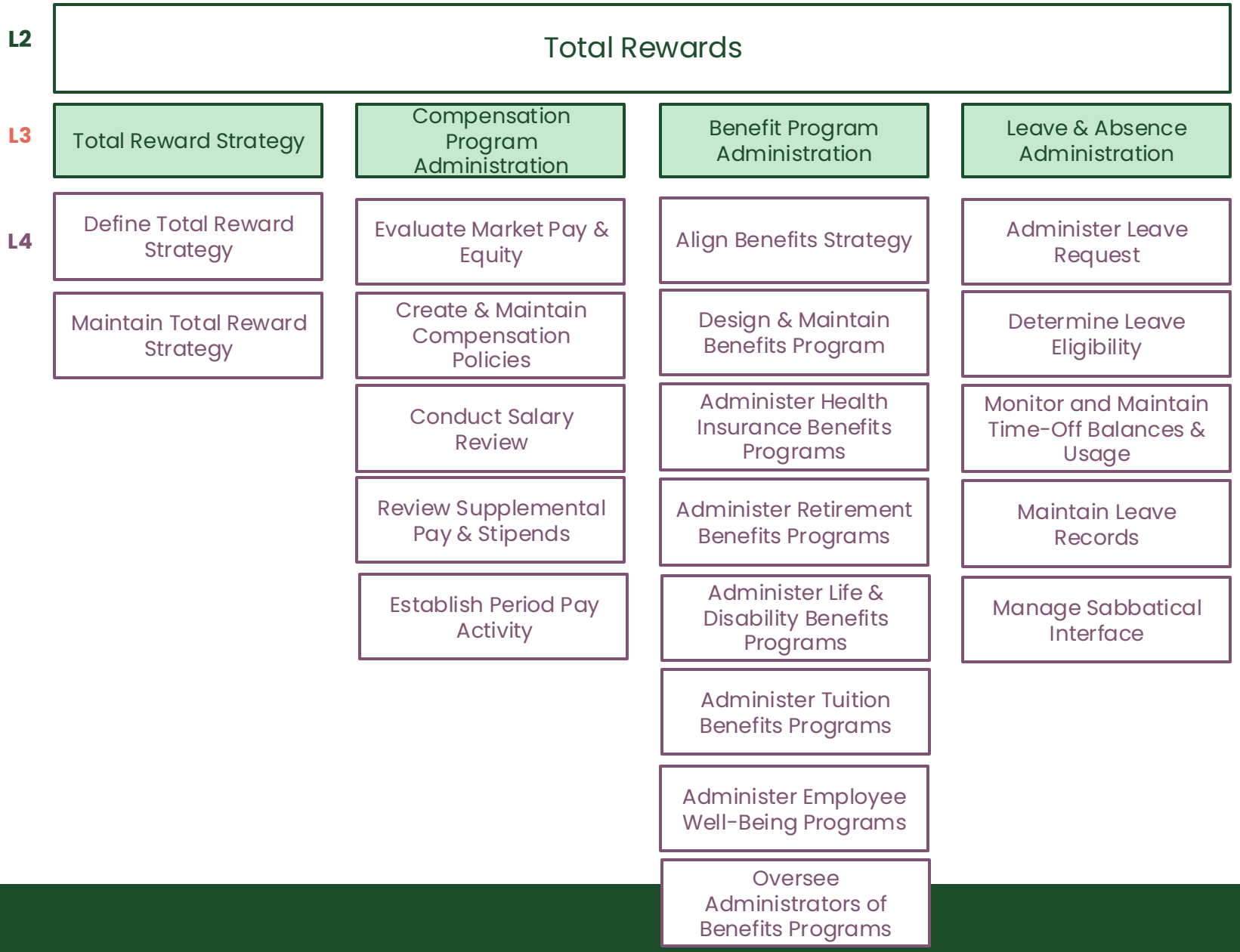
Talent Acquisition



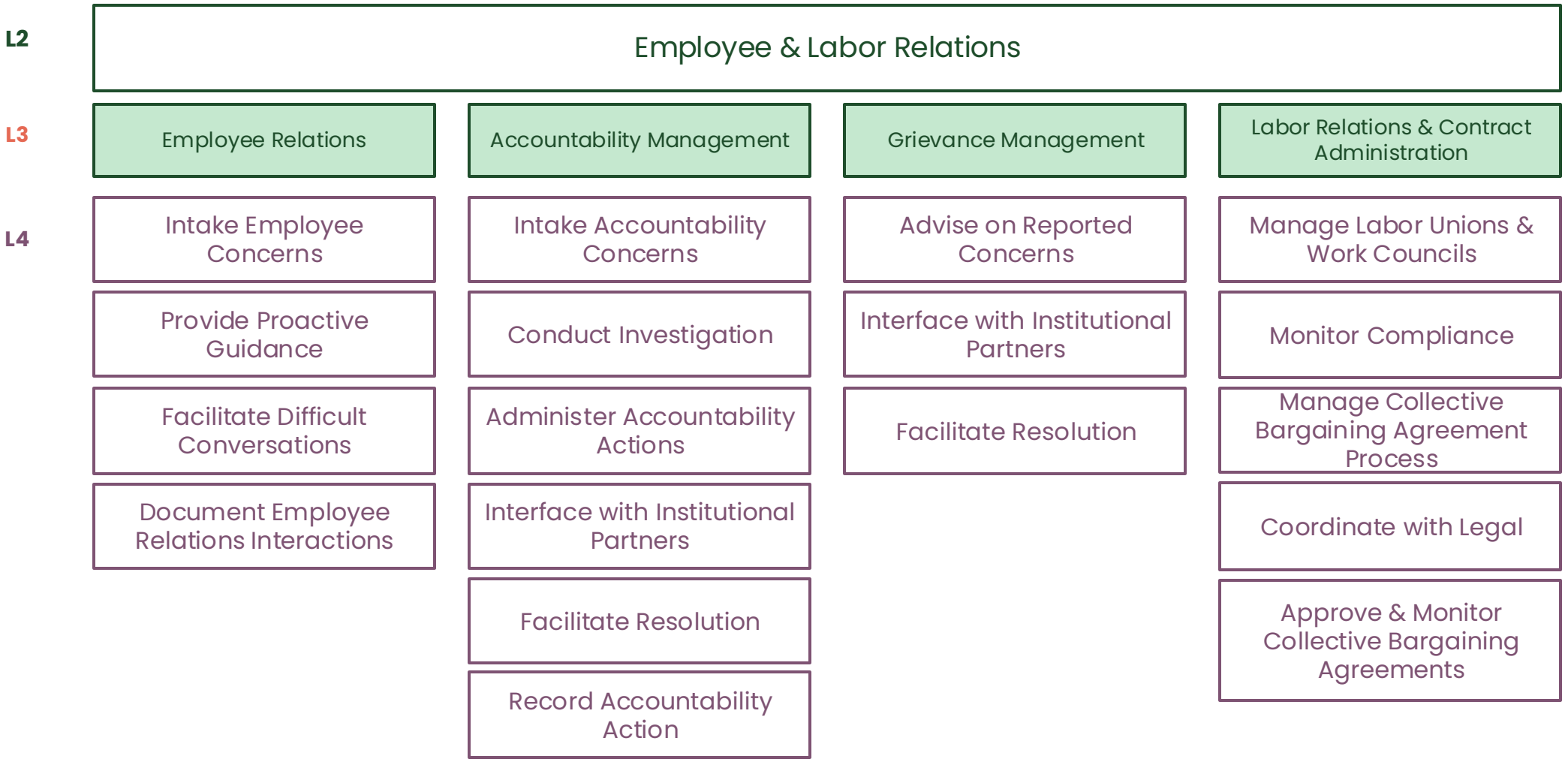
Talent Management

L2	Talent Management						
L3	Performance Assessment Strategy	Performance Management	Learning & Professional Development	Training Program Management	Talent Engagement & Recognition Program Management	Professional & Industrial Certification	Succession Planning
L4	Establish Performance Framework	Manage Performance Reviews	Assess Learning Needs	Plan Training Calendar	Design Recognition Program	Verify Certification Requirement	Identify Critical Roles & Gaps
	Define Performance Cycle	Run Performance Cycle	Design Learning Curriculum	Develop Training Materials	Administer Recognition Initiatives	Fund Certification Support	Build Development Plan
	Publish Assessment Guidance	Record Performance Review Outcomes	Deliver Learning Programs	Assign Training	Develop & Execute Engagement Survey	Monitor Certification Status	Monitor Succession Risk
	Train User Community	Communicate Performance Outcomes	Evaluate Learning Outcomes	Deliver Training Program	Analyze Engagement Results	Report Certification Compliance	Report Succession Readiness
		Manage Individual Development Plans	Maintain Learning Repository	Evaluate Training Impact	Measure Engagement Outcomes		
				Track Training Compliance			

Total Rewards



Employee & Labor Relations



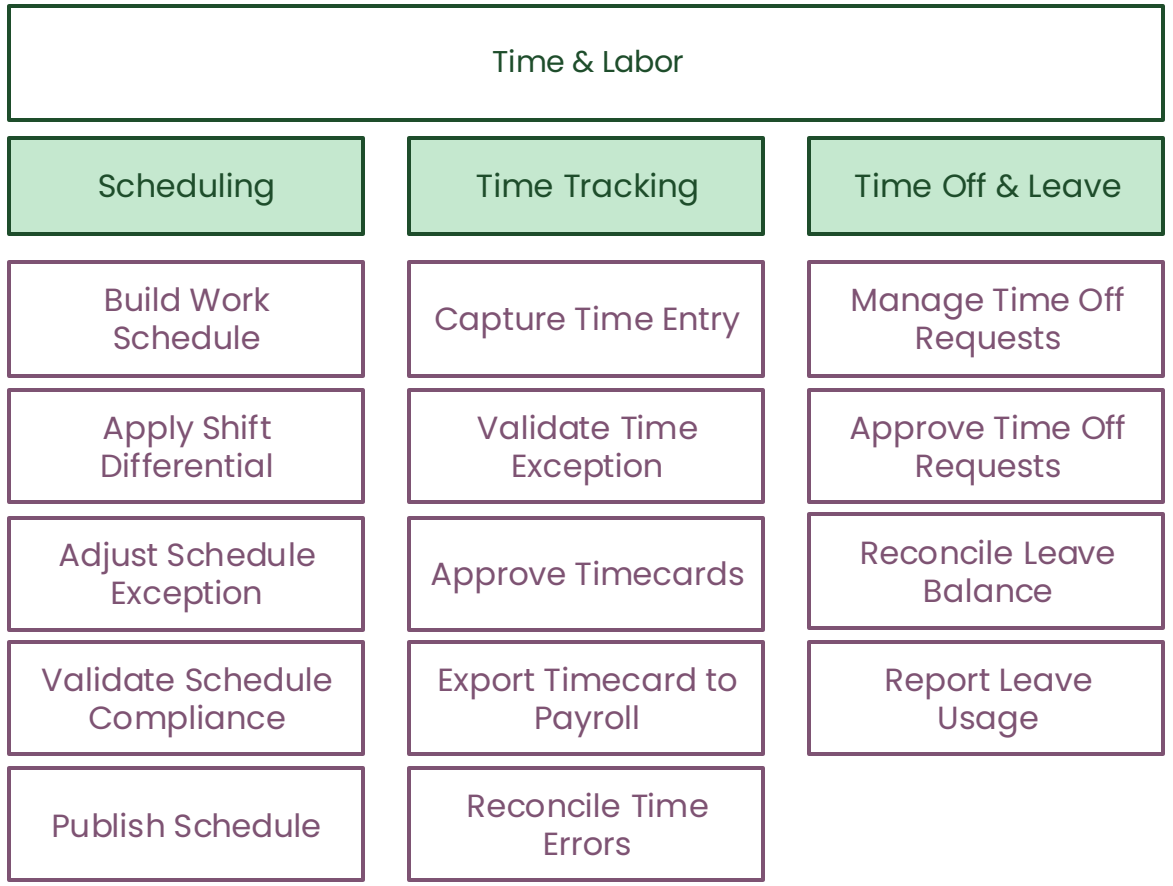
Workforce Administration

L2	L3	L4				
Workforce Administration	Workforce Data Updates	Manage Position Data	Manage Employee Records	Process Employment Status Changes	Process External Employment Verification Requests	
	Workforce Separation Processing – Voluntary & Involuntary	Initiate Separation	Record Separation Reason	Coordinate Final Pay		
	Offboarding	Conduct Exit Interviews	Conduct Knowledge Transfer	Revoke System Access	Collect Institutional Property	Complete Final Documentation
	Relocation	Determine Relocation Eligibility	Coordinate with Relocation Vendors	Manage Relocation Expenses	Support International Relocation	Manage Assignment End
	Sponsorship	Assess Sponsorship Eligibility	Process I-9 and E-Verify	Prepare Visa & Immigration Documentation	Maintain Sponsorship Records	
	Transfer & Retention Management	Process Transfers	Process Reclassification	Process Reinstatement for State Classified Personnel	Monitor Retention Risks	

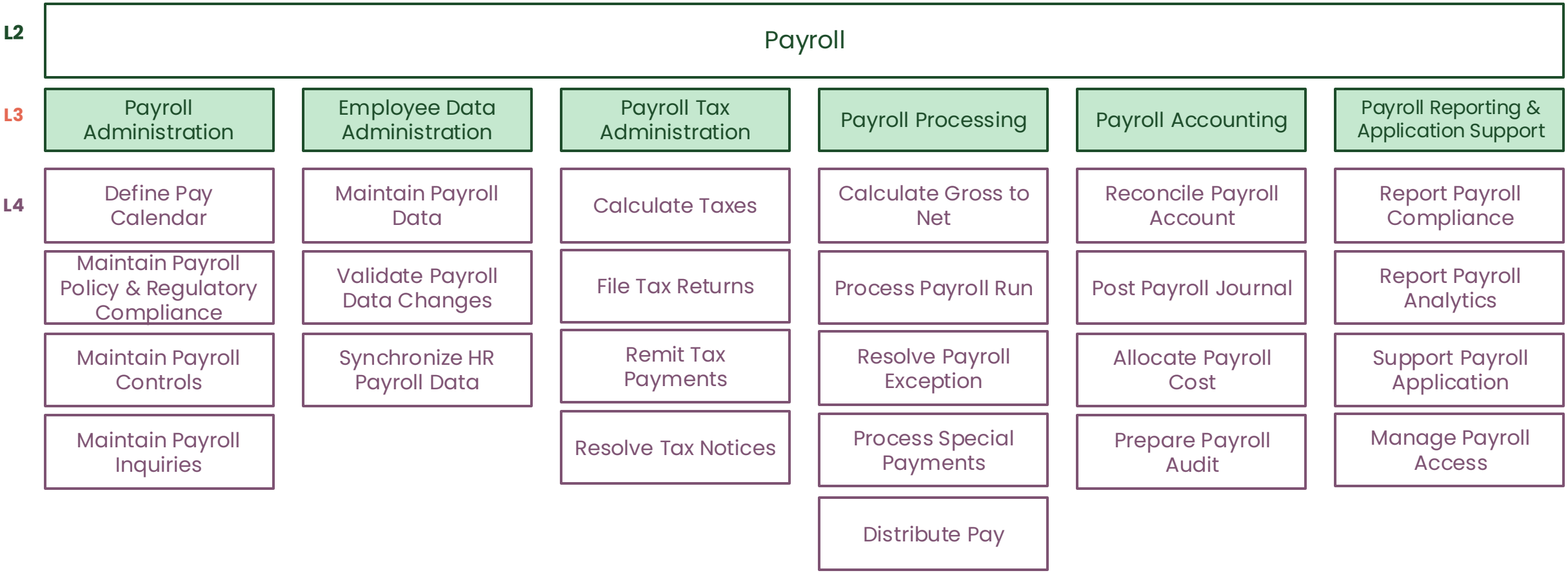
HRIS & Data Management

L2	HRIS & Data Management					
L3	Data Architecting	Data Management	HR Reporting & Analytics	HR System Business Architecture	HR Application Support	Data Security
L4	Model HR Data	Govern HR Data	Maintain Standard Reporting	Define Business Requirements	Triage User Tickets	Request, Review & Assign Role Permissions
	Define Integration Specifications	Manage Records & Files	Fulfill Ad Hoc Reporting Requests	Design System Solutions	Resolve Application Issues	Conduct Access Audit
	Validate Data Architecture	Maintain Data Quality	Maintain Analytics Dashboards	Configure Workflow Rules	Manage Release Updates	Support Incident Management
	Maintain Data Dictionary		Support Audit Reporting	Validate System Changes	Maintain Integrations	Remediate Security Risks
				Document System Architecture		Support Audit Security Compliance

Time & Labor


L2
Time & Labor
L3
Scheduling
Time Tracking
Time Off & Leave
L4
Build Work Schedule
Apply Shift Differential
Adjust Schedule Exception
Validate Schedule Compliance
Publish Schedule
Capture Time Entry
Validate Time Exception
Approve Timecards
Export Timecard to Payroll
Reconcile Time Errors
Manage Time Off Requests
Approve Time Off Requests
Reconcile Leave Balance
Report Leave Usage

Payroll


L2
Payroll
L3
Payroll Administration
Employee Data Administration
Payroll Tax Administration
Payroll Processing
Payroll Accounting
Payroll Reporting & Application Support
L4
Define Pay Calendar
Maintain Payroll Policy & Regulatory Compliance
Maintain Payroll Controls
Maintain Payroll Inquiries
Maintain Payroll Data
Validate Payroll Data Changes
Synchronize HR Payroll Data
Calculate Taxes
File Tax Returns
Remit Tax Payments
Resolve Tax Notices
Calculate Gross to Net
Process Payroll Run
Resolve Payroll Exception
Process Special Payments
Distribute Pay
Reconcile Payroll Account
Post Payroll Journal
Allocate Payroll Cost
Prepare Payroll Audit
Report Payroll Compliance
Report Payroll Analytics
Support Payroll Application
Manage Payroll Access

HR Leadership & Strategy

L3	HR Strategic Planning	Aligns HR initiatives with institutional academic missions, long-term goals, and operational priorities. Collaborates with leadership to drive faculty and staff engagement and student success.
		Draft Definitions
L4	Design HR Strategy	Develop the overarching Human Resources strategy that aligns with the institution's mission, academic goals, and workforce needs. This includes defining strategic priorities for talent, workforce development, and employee experience.
L4	Prioritize HR Initiatives	Evaluate and rank HR programs, projects, and initiatives based on strategic alignment, expected impact, resource requirements, and risk. Ensure that the HR portfolio supports institutional priorities and available capacity.
L4	Govern HR Portfolio	Establish governance structures and decision-making processes to oversee HR initiatives, ensure accountability and transparency, monitor progress, and manage dependencies across HR projects and functional areas.
L4	Define HR KPI & Measurement Strategies	Identify and define key performance indicators (KPIs) to measure HR effectiveness and strategic outcomes. Develop measurement frameworks, data sources, and reporting cadence to track progress against institutional and HR goals.
L4	Execute & Maintain HR Strategy	Operationalize the HR strategy by coordinating implementation activities, monitoring execution, and making adjustments as needed. Ensure that HR strategic plans remain current and responsive to institutional and external changes.
L4	Define Capability Roadmap	Identify and plan the development of critical HR and workforce capabilities required to achieve the institutional strategy. Outline sequencing, investment needs, and dependencies across processes, systems, and people.

HR Leadership & Strategy

L3	Culture Strategy	Cultivates a campus-wide culture that reflects institutional values and promotes inclusivity. Drives alignment between employee behaviors and the university's mission through initiatives that enhance engagement and support academic/administrative excellence.
		Draft Definitions
L4	Design Culture Strategy	Define the desired organizational culture, including shared values, behaviors, and mindsets that support the institution's mission. Develop strategies and programs to reinforce and sustain this culture among faculty and staff.
L4	Design Engagement Activities	Develop and plan programs, campaigns, and activities that foster employee engagement, recognition, and well-being. Examples include engagement surveys, recognition programs, and community-building initiatives.
L4	Execute Action Plan	Translate culture priorities into operational activities and manage their delivery. Interface with leaders and teams to provide support and guidance. Regularly monitor implementation and make improvements based on results and feedback.
L4	Measure Engagement Effectiveness	Use qualitative and quantitative tools to assess the impact of engagement activities on employee morale, retention, and performance.

HR Leadership & Strategy

L3	Workforce Strategy	Forecasts future workforce needs and identifies talent gaps by analyzing trends. Aligns staffing models with institutional goals and ensures a balanced mix of faculty, staff, and leadership. Integrates with total rewards strategy by addressing institutional competencies and compensation philosophy.
		Draft Definitions
L4	Plan Multi-Year Resource Development	Develop multi-year plans for workforce and capability development, incorporating projected staffing needs, succession planning, and skill-building initiatives to meet institutional objectives.
L4	Design Staffing Models	Create frameworks that define staffing structures, ratios, and role designs across academic and administrative units. Align staffing models with service delivery goals, workload demands, and budget constraints.
L4	Forecast Workforce Demand	Project future workforce requirements based on institutional growth, programmatic changes, retirement trends, and evolving skill needs. Support long-term workforce and budget planning with data-informed insights.
L4	Assess Talent & Skills Needs	Analyze current workforce capabilities and identify gaps in skills and competencies required to meet strategic objectives.
L4	Model Workforce Scenarios	Use data and scenario modeling to assess potential changes in workforce composition, funding, or institutional priorities. Evaluate “what-if” scenarios to support strategic decision-making and risk management.

HR Leadership & Strategy

L3	HR Communication Strategy	Manages communication of HR policies, initiatives, and updates across faculty, staff, and leadership. Promotes transparency, engagement, and compliance through clear and consistent messaging aligned with institutional needs.
		Draft Definitions
L4	Design Communication Strategy	Develop a comprehensive HR communication strategy aligned with institutional goals and workforce needs. Define the objectives, key messages, target audiences, and success measures to ensure clear, consistent, and effective communication of HR programs, policies, and initiatives.
L4	Develop Delivery Channels	Identify and establish appropriate platforms and methods for distributing HR-related information effectively.
L4	Create Communication Assets	Develop communication materials that convey HR messages, programs, and initiatives. Assets may include visual designs, written content, videos, infographics, FAQs, and toolkits, ensuring they align with institutional branding and tone.
L4	Create Feedback Mechanisms	Implement tools and processes to gather employee input and reactions to HR communications and initiatives.
L4	Deliver Communication	Execute planned communications across chosen channels, ensuring timely delivery, message consistency, and coordination across HR and institutional functions. Monitor distribution to ensure messages reach intended audiences.

HR Leadership & Strategy

L3	HR Policy Strategy	Maintains HR policies that align with legal standards, institutional priorities, and best practices. Supports operational consistency and equity through regular review, updates, and communication. Encourages decentralized collaboration in policy development.
		Draft Definitions
L4	Define HR Policies	Establish the guiding principles, standards, and rules that govern HR practices within the institution. Collaborate with legal, compliance, and leadership stakeholders to ensure policies align with institutional mission, values, and regulatory requirements.
L4	Define Policy Governance & Oversight	Develop and maintain the framework for HR policy ownership, approval, version control, and compliance monitoring. Define roles, responsibilities, and procedures for creating, reviewing, approving, and retiring HR policies.
L4	Manage & Update HR Policies	Administer the HR policy lifecycle by reviewing, revising, and maintaining existing policies to ensure ongoing relevance and compliance with evolving laws, regulations, and institutional priorities.
L4	Communicate Policy Updates	Communicate and distribute approved policy changes to relevant audiences. Ensure updates are accessible through official channels (e.g., intranet, HR portal) and that employees are informed of implications, effective dates, and required actions.
L4	Interpret Policy & Provide Guidance	Review and clarify policies to ensure they are consistently understood and applied. Provide guidance on how policies apply to specific situations, their interpretation, recommended actions, and risk considerations.

HR Business Operations & Support

L3	HR Governance	Establishes decision-making structures, roles, and accountability mechanisms within the HR function. This involves collaboration across academic units, administrative departments, and shared governance bodies to ensure HR policies and practices reflect institutional values and compliance requirements.
		Draft Definitions
L4	Define Governance Structure	Establish the organizational framework for HR decision-making, including roles, responsibilities, and authority levels across academic and administrative units.
L4	Assign Decision Rights	Clarify which individuals or groups have the authority to make specific HR decisions, ensuring transparency and alignment with institutional governance norms.
L4	Identify Accountability Mechanisms	Define processes and structures that hold decision-makers responsible for outcomes, ensuring HR actions are consistent with policy, ethical standards, and institutional goals.
L4	Establish Escalation Paths	Create clear procedures for elevating HR issues or decisions to higher levels of authority when resolution is not possible at the initial level.
L4	Review Governance Effectiveness	Periodically assess the performance of HR governance structures and processes so that they remain effective, inclusive, and aligned with institutional needs.

HR Business Operations & Support

L3	HR Policy & Regulatory Compliance	Ensures adherence to federal, state, and institutional laws, accreditation standards, union requirements, and university policies. This function supports risk mitigation and promotes ethical and lawful HR practices throughout the institution.
		Draft Definitions
L4	Establish Compliance Programs	Develop and implement structured programs to ensure HR activities adhere to applicable federal, state, and institutional laws, regulations, and policies.
L4	Monitor Regulatory Changes	Track federal, state, and institutional requirements affecting HR operations and policies.
L4	Interpret Compliance Requirements	Translate legal/regulatory requirements (e.g., FLSA, FMLA, ADA) into HR policies and processes and determine impacts on the institution.
L4	Perform Compliance Audits	Assess HR processes, records, and practices to verify adherence to institutional policies, laws, and accreditation standards; identify gaps and corrective actions.
L4	Manage Policy Exceptions	Review and evaluate requests for deviations from established HR policies or standards, ensuring appropriate justification, documentation, and approvals.

HR Business Operations & Support

L3	HR Project Management	Oversees planning, execution, and evaluation of HR-related initiatives such as policy rollouts, system implementations, and organizational change. Coordinates with diverse stakeholders to manage timelines, deliverables, and institutional impact effectively.
		Draft Definitions
L4	Define the Business Case for HR Projects	Develop rationale and expected benefits for HR initiatives, including cost, value, risk, and alignment with institutional strategy.
L4	Project Portfolio Management	Project portfolio management and prioritization (institutional priorities, compliance & regulatory)
L4	Plan Project Delivery	Build plans, schedules, resources, and risks; align with academic calendars.
L4	Execute Project Plan	Carry out planned HR project activities, monitor progress, and manage risks and issues to meet objectives on time and within scope.
L4	Assess & Execute Change Management	Develop and deliver communication, training, and engagement activities to prepare HR staff and institutional stakeholders for changes introduced by HR projects.
L4	Evaluate Success	Measure and evaluate the tangible and intangible benefits realized from HR projects against the investment made to deliver them including employee experience improvements and returns on investment.

HR Business Operations & Support

L3	HR Resource Management	Manages the allocation and utilization of HR staff, budgets, and systems to support institutional priorities. This includes vendor management, campus coordination, and ensuring resources are used efficiently across departments.
		Draft Definitions
L4	Allocate HR Staffing	Determine and assign appropriate HR resources and capacity across programs, functions, and projects to meet organizational needs. This refers to resources within the HR Department and not the broader institution.
L4	Manage HR Budget	Plan, monitor, and control HR expenditures to ensure financial stewardship and alignment with institutional priorities.
L4	Track Resource Utilization	Monitor how HR resources—both human and financial—are being used to ensure efficient allocation and identify areas for optimization.
L4	Manage Vendors	Oversee relationships and performance of third-party HR service providers, ensuring contractual compliance, quality, and value for money.

HR Business Operations & Support

L3	HR Performance Metrics & Analytics	This assesses the performance of the HR function overall. Tracks and evaluates HR effectiveness using key performance indicators (KPIs). This includes metrics related to engagement, hiring speed, retention, diversity outcomes, and staff development success.
		Draft Definitions
L4	Define HR KPI Catalog	Develop and maintain a standardized list of key performance indicators (KPIs) to measure HR effectiveness, efficiency, and service delivery.
L4	Build HR Dashboards	Design and configure data visualization tools that present HR metrics, KPIs, and trends in an accessible, actionable format.
L4	Analyze HR Outcomes	Evaluate HR data and trends to identify insights about workforce performance, engagement, and institutional effectiveness.
L4	Report HR Performance	Produce regular reports and summaries that communicate HR performance metrics and outcomes to institutional leadership and stakeholders.
L4	Improve Performance Measures	Review and refine HR KPIs and metrics to ensure continued relevance, accuracy, and alignment with institutional goals.

HR Business Operations & Support

L3	Process Improvement	Identifies inefficiencies and enhances HR processes to improve service delivery, compliance, and user satisfaction. This function promotes operational excellence and continuous improvement.
		Draft Definitions
L4	Identify & Prioritize Process Improvement Initiatives	Assess HR processes to identify inefficiencies, pain points, or opportunities for enhancement, and rank initiatives based on impact and feasibility.
L4	Design/Redesign HR Processes	Map, document, and optimize HR processes to improve effectiveness, efficiency, and alignment with best practices or institutional standards.
L4	Implement Process Improvement Initiatives	Execute and embed approved process changes, ensuring appropriate communication, training, and adoption across HR and related units.
L4	Measure Process Improvement	Track and evaluate process efficiency, quality, and compliance to confirm that improvements are delivering expected results.
L4	Maintain Standardized Process Documentation	Create and regularly update documentation that captures approved HR process designs, workflows, and procedural guidance for institutional consistency.
L4	Design Process Improvement Framework	Create frameworks to improve processes or workflows.

Workforce Planning

L3	Org Design	Defines and structures roles, departments, and reporting relationships to support the institution's academic and administrative goals. This includes aligning organizational structures with shared governance, interdisciplinary collaboration, and evolving service delivery models.
		Draft Definitions
L4	Define & Maintain Org Design Strategy	Establish and continuously refine a strategic framework for how the institution organizes its workforce, ensuring alignment with academic and administrative goals, operational efficiency, and adaptability to change.
L4	Define & Structure Roles	Specify the responsibilities, expectations, and required competencies for each position to support clarity, accountability, and effective performance across the institution.
L4	Define & Structure Departments	Organize institutional functions into coherent departments based on mission, services, and workflows to promote collaboration, specialization, and operational effectiveness.
L4	Define & Structure Reporting Relationships	Design formal lines of authority and communication that support clear supervision, decision-making pathways, and accountability within the organizational hierarchy. Includes interactions within and between university functions.

Workforce Planning

L3	Job Catalog & Framework	Maintains a standardized inventory of job roles, classifications, and competencies across the institution. This supports consistency in hiring, compensation, and career progression, while ensuring compliance with labor regulations and accreditation standards.
		Draft Definitions
L4	Create & Manage Job Catalog	Design and manage the roles available to the organization, competencies, pay structure, and career progressions for each role. Create & manage job families, levels, and titles across units. Solicit feedback from campus on position gaps/needs. Work to standardize titles, roles and responsibilities across campuses.
L4	Evaluate Job Classifications	Review/validate position classifications for equity and compliance.
L4	Map Competency Framework	Define competencies and proficiency levels by job family; align to learning strategy.

Workforce Planning

L3	Position Management	Oversees the lifecycle of institutional positions—including creation, classification, funding, and tracking. Ensures alignment with budgetary constraints, academic staffing needs, and institutional organizational structures.
		Draft Definitions
L4	Manage Position Inventory	Oversees the operational status of positions by managing and tracking openings, freezes, and closures, while providing support to units to hire in alignment with institutional priorities.
L4	Oversee Position Funding	Support conversations around position funding and the financial sustainability of individual positions throughout their lifecycle. This includes validating funding sources against institutional priorities, monitoring compliance with budgetary constraints, and adjusting allocations when funding shifts occur. Collaborate with HR and finance colleagues to ensure position-level funding aligns with approved job classifications and long-term workforce plans.

Workforce Planning

L3	Annual Planning	Coordinates annual HR planning activities such as resource allocation, hiring timelines, and strategic initiatives. Aligns HR goals with institutional budgeting cycles, enrollment forecasts, and academic calendars to support workforce readiness and stability.
		Draft Definitions
L4	Create Annual Hiring Plan	Develop a strategic hiring roadmap based on institutional needs, budget, and workforce planning. Ensure that annual hiring plans meet state and federal laws / requirements.
L4	Manage Workforce Gap Outcomes	Make the decision to train or hire for each identified workforce gap. Interface w/ training team or talent acquisition based on outcome.
L4	Coordinate Finance Integration	Focus on integrating workforce planning with institutional financial strategy at a macro level. This involves translating annual hiring plans and headcount forecasts into budget models, ensuring alignment with fiscal calendars, and reconciling projected staffing costs with available resources. Maintain financial readiness for planned workforce changes.
L4	Plan Academic Cycle Staffing	Anticipate seasonal needs (semester start, summer) across staff and student workers.
L4	Publish & Maintain Annual HR Calendar	Publish key dates for hiring, merit, contracts, benefits, and payroll cycles.
L4	Review Annual HR Plan	Conduct checkpoints; adjust for funding, enrollment, policy changes, or changes in state/federal laws.

Talent Acquisition

L3	Talent Networking & Sourcing	Engages with internal and external networks, professional associations, and digital platforms to attract qualified candidates. This supports institutional goals and helps build strong talent pipelines for current and future academic and administrative roles.
		Draft Definitions
L4	Develop Sourcing Strategy	Define sourcing channels (e.g., apprenticeships, internships, referral programs, retirees, community partners, etc.), priorities, and tactics to accommodate staffing needs. Align with workforce plans.
L4	Monitor & Optimize Sourcing Performance	Measure yield, effectiveness, quality, and cost of sources; iterate as needed.
L4	Facilitate Engagement & Outreach Activities	Coordinate and execute activities that foster connections and promote organizational initiatives (e.g., planning and running events, engaging participants, managing soft-touch communications, conducting follow-ups, sharing relevant process updates, maintaining networks to support long-term relationship development, etc.).

Talent Acquisition

L3	Job Description	Creates and maintains accurate job descriptions that define the responsibilities, qualifications, and competencies required for each position. Ensures alignment with institutional mission, job classification systems, and compliance standards.
		Draft Definitions
L4	Gather Job Requirements	Collect role duties, qualifications, and competencies from hiring managers. Educate and inform how to best determine minimum qualifications and what is truly necessary for the role.
L4	Draft Job Descriptions	Write transparent, inclusive descriptions aligned to job catalog and classification.
L4	Validate Job Descriptions	Validate qualifications and essential functions (ADA/EEO) with stakeholders.
L4	Publish Job Descriptions	Post to centralized repository and attach to requisitions.

Talent Acquisition

L3	Assessment & Selection	Implements structured, standardized methods for evaluating candidate qualifications, competencies, and institutional fit. This includes interviews, testing, and reference checks to support equitable, compliant, and data-informed hiring decisions.
		Draft Definitions
L4	Screen Candidates	Apply minimum qualifications and preferred criteria to shortlist candidates consistently. Provide education and guidance on screening best practices; develop supporting materials (e.g., screening forms).
L4	Interview Candidates	Facilitate, oversee, and/or conduct structured interviews to assess candidate qualifications and alignment with institutional values.
L4	Administer Assessments	Use validated testing and work samples where appropriate to assess job alignment.
L4	Support Candidate Selection	Where appropriate, support final hiring decisions based on evaluation criteria, stakeholder input, and institutional priorities.
L4	Conduct Reference Checks	Verify past performance and employment history consistently per policy. Provide guidance related to reference checks.
L4	Document & Deliver Selection Decisions	Provide candidates with status updates and feedback consistent with policy. Maintain documentation provided by the search committee including meeting notes to align with institutional requirements.

Talent Acquisition

L3	Candidate Employment Verification & Credentialing	Conducts background checks, credential verification, employment history validation, and other pre-employment screenings to ensure compliance with legal and institutional hiring standards.
		Draft Definitions
L4	Conduct Pre-Employment Screening Process	Initiate, conduct, and coordinate pre-employment screening when mandated by law or institutional policy. Verify candidate credentials, degrees, licenses, criminal history, and other relevant information to support safe and compliant hiring.
L4	Deliver Screening Results	Communicate background check outcomes to hiring managers and HR staff for final decision-making. Communicate outcomes to candidates where appropriate.
L4	Maintain Screening Records	Store screening outcomes securely and in accordance with retention schedules.
L4	Manage Vendor Strategy	Establish and oversee policies and processes for engaging third-party vendors to conduct candidate employment verification and credentialing assessments. This includes selecting and managing vendors, ensuring compliance with institutional standards, and coordinating with academic and administrative units to optimize use of university funding and maintain cost efficiency.

Talent Acquisition

L3	New Hire Data & Offer	Coordinates the offer process, including salary negotiation, contract preparation, and onboarding scheduling. Ensures alignment with institutional compensation guidelines, policy compliance, and timely communication with selected candidates.
		Draft Definitions
L4	Prepare Offer Package	Draft compensation, appointment terms, and contingencies consistent with guidelines. Deliver standardized offer letters/contracts and track acceptances.
L4	Manage Salary Negotiation	Facilitate discussions with selected candidates to finalize compensation packages within institutional guidelines. Verify that funds are available for the agreed-upon salary / signing bonuses.
L4	Route Offer Approval	Secure approvals per delegation of authority and funding rules for both written and verbal approvals.

Talent Acquisition

L3	Candidate Onboarding	Facilitates the integration of new employees into the institution through structured orientation, training, and administrative setup. This includes access to academic systems, policy education, and cultural acclimation to campus life.
		Draft Definitions
L4	Collect Onboarding Documentation	Gather forms, IDs, and acknowledgements required by policy and law. Complete Form I-9/E-Verify steps and retention per policy.
L4	Provision System Access	Coordinate access to HR, finance, academic, and facility systems.
L4	Deliver Onboarding Program	Provide institutional orientation and local acclimation activities.
L4	New Employee Integration	Support onboarding activities that help new hires acclimate to institutional culture, systems, and expectations.
L4	Record Funding Allocation	Record FTE and funding distribution for the hire to enable downstream processing.

Talent Acquisition

L3	Employer Brand	Develops a multi-channel (including social media) strategy and promotes the institution's reputation as an employer of choice through consistent messaging, candidate experience, and engagement with the broader academic community. Drives recruitment marketing aligned with institutional values, strategies, and goals.
		Draft Definitions
L4	Create & Maintain Employer Brand	Design, implement, and continuously refine the institution's employer brand strategy to position the institution as an employer of choice. Activities focus on sustaining alignment with institutional values, recruitment goals, and engagement with the academic community. Coordinate with Marketing and Communications to distribute this brand as appropriate.
L4	Adapt University Brand into HR Materials	Integrate the institution's brand identity—such as tone, visual elements, and messaging—into HR documents, communications, and experiences to support consistency and reinforce institutional values. Integrate unit-level branding where appropriate.
L4	Monitor & Communicate Changes to the Brand	Track updates or shifts in the university's brand strategy or guidelines so that HR materials remain aligned and current. Inform HR team members about changes and provide guidance on how to reflect these changes.
L4	Define and Maintain Employee Value Proposition	Articulate and sustain a clear, compelling statement of what the institution offers employees in return for their skills and contributions, including culture, benefits, career development, and purpose.
L4	Monitor Employee Value Proposition Effectiveness	Evaluate how well the employee value proposition resonates with current and prospective staff, using feedback and data to refine messaging and offerings.

Talent Management

L3	Performance Assessment Strategy	Establishes the framework for assessing employee performance in alignment with institutional goals. This includes defining performance expectations, evaluation cycles, and feedback mechanisms to guide development, recognition, and career growth.
		Draft Definitions
L4	Establish Performance Framework	Define the institution-wide framework for managing and evaluating employee performance. This includes setting the performance philosophy, rating scales, and competency models, and ensuring alignment with organizational goals, values, and workforce segments. The framework also supports long-term employee development and succession planning efforts.
L4	Define Performance Cycle	Design the timeline and sequence of activities for performance management (e.g., goal setting, mid-year check-ins, annual reviews). Ensure the cycle aligns with academic and fiscal calendars, allowing for consistency across units and employee groups.
L4	Publish Assessment Guidance	Develop and disseminate clear guidance and supporting materials to help employees and supervisors conduct fair, consistent, and meaningful performance assessments.
L4	Train User Community	Provide training, resources, and standardized assessment guidelines for supervisors, managers, leaders, and review committees to ensure consistent and equitable application of performance criteria.

Talent Management

L3	Performance Management	Implements structured processes for evaluating employee performance, capabilities, and growth potential. This includes cyclical reviews for employees, with links to promotion, development, and workforce planning, and succession planning.
		Draft Definitions
L4	Manage Performance Reviews	Coordinate and oversee the performance review process across the institution. This includes tracking completion rates, ensuring compliance with timelines, and supporting units with tools or troubleshooting during the review cycle.
L4	Run Performance Cycle	Execute the planned performance cycle activities, including goal setting, interim feedback sessions, and formal evaluations. Monitor progress, provide support to leaders and employees, and ensure adherence to institutional timelines and standards. Provide one-on-one or small group coaching between performance cycles to support continuous improvement.
L4	Record Performance Outcomes	Capture and maintain final performance evaluation data in the HR system of record. Ensure outcomes are securely stored, accessible to authorized stakeholders, and available for downstream processes such as compensation, promotion, or development or succession planning. Provide support to leaders, managers, and supervisors to deliver outcomes to recipients in a fair and professional way.
L4	Communicate Performance Outcomes	Share performance review results with employees and relevant stakeholders, ensuring clarity, transparency, and alignment with institutional policies.
L4	Manage Individual Development Plans	Support the creation, documentation, and monitoring of individual development plans based on performance outcomes and career aspirations. Coordinate with learning and development resources to ensure access to skill-building and growth opportunities.

Talent Management

L3	Learning & Professional Development	Provides opportunities for faculty and staff to enhance knowledge, skills, and career progression through structured learning programs. This includes leadership development, workshops, conferences, and continuing education aligned with established competencies, institutional goals and academic excellence.
		Draft Definitions
L4	Assess Learning Needs	Identify and analyze current and future learning needs for employees. Use performance data, competency assessments, and institutional priorities to determine skill gaps and training requirements.
L4	Design Learning Curriculum	Develop structured learning pathways, programs, and initiatives that address institutional competencies, compliance requirements, leadership development, and role-specific skills. Support units creating specialized learning where appropriate.
L4	Deliver Learning Programs	Facilitate and manage the delivery of learning activities. Coordinate logistics, facilitators, and learner communications.
L4	Evaluate Learning Outcomes	Measure the effectiveness of learning programs through participant feedback, assessments, and post-training performance indicators. Use results to refine program content, format, and delivery.
L4	Maintain Learning Repository	Maintain searchable catalog of courses, paths, programs, and prerequisites. Integrate standardization where appropriate.

Talent Management

L3	Training Program Management	Designs, delivers, and evaluates training initiatives that support onboarding, compliance, role-specific competencies, and institutional priorities. This includes programs for employee onboarding, student-facing services, and training.
		Draft Definitions
L4	Plan Training Calendar	Develop and maintain an annual or quarterly training calendar that aligns with institutional priorities, compliance requirements, and employee development cycles. Coordinate timing to support workforce availability and operational needs.
L4	Develop Training Materials	Create instructional content, guides, and multimedia materials for use in training programs. Ensure materials are accurate, inclusive, and tailored to diverse learning styles and audiences.
L4	Assign Training	Enroll employees in training programs that match their roles, responsibilities, and development needs.
L4	Deliver Training Program	Administer and execute scheduled training sessions, workshops, and e-learning modules. Manage participant registration, attendance, and technical delivery to ensure smooth execution.
L4	Evaluate Training Impact	Assess the broader impact of training programs on job performance, employee engagement, and institutional outcomes. Use evaluation frameworks to determine effectiveness and return on investment.
L4	Track Training Compliance	Record completions and escalate overdue items to leaders.

Talent Management

L3	Talent Engagement & Recognition Program Management	Develops and implements programs that promote employee engagement, motivation, and retention. Includes recognition initiatives, feedback systems, and award programs that align with institutional culture and reinforce a positive workplace environment.
		Draft Definitions
L4	Design Recognition Program	Create structured initiatives that celebrate employee achievements and contributions in ways that reflect institutional culture and values. Coordinate with finance resources to understand feasibility.
L4	Administer Recognition Initiatives	Implement and manage recognition activities, such as awards, shout-outs, or milestone celebrations, ensuring consistent and inclusive execution.
L4	Develop & Execute Engagement Survey	Design and administer surveys (including stay and exit surveys/interviews, pulse surveys, etc.) to gather employee feedback on workplace satisfaction, motivation, and alignment with institutional values.
L4	Analyze Engagement Results	Interpret survey data to identify trends, strengths, and areas for improvement in employee engagement across the institution.
L4	Measure Engagement Outcomes	Track engagement metrics over time to evaluate the impact of interventions, leadership actions, and institutional changes. Report trends and insights to leadership to guide strategic workforce decisions.

Talent Management

L3	Professional & Industrial Certification	Supports employees in obtaining and maintaining required professional or academic certifications relevant to their roles. This may include HR, finance, academic, or technical credentials to support compliance and advancement.
		Draft Definitions
L4	Verify Certification Requirement	Identify and validate the certifications, licenses, or credentials required for specific roles—particularly those tied to compliance, accreditation, or professional standards.
L4	Fund Certification Support	Establish and manage programs or budgets that provide financial or administrative support for employees pursuing or renewing required certifications. Define eligibility criteria, reimbursement processes, and funding limits.
L4	Monitor Certification Status	Track the current certification and licensure status of employees across the institution. Maintain records in the HR system to ensure visibility into upcoming expirations and compliance with regulatory or professional requirements.
L4	Report Certification Compliance	Generate and distribute reports on certification completion, renewal, and compliance rates to institutional leaders, HR partners, and auditors. Support accountability and audit readiness through accurate, up-to-date reporting.

Talent Management

L3	Succession Planning	Identifies and prepares internal talent to fill key leadership and specialized roles within the institution. Ensures institutional continuity through talent pipelines aligned with long-term workforce planning in academic and administrative domains.
		Draft Definitions
L4	Identify Critical Roles & Gaps	Identify roles essential to institutional continuity, mission achievement, and operational stability. Evaluate current and anticipated gaps, considering factors such as strategic impact, depth of institutional knowledge, and difficulty of replacement to prioritize succession planning efforts.
L4	Build Development Plan	Develop targeted development plans for high-potential employees and successors identified through talent reviews. Include a mix of learning experiences, stretch assignments, and mentorship opportunities aligned with institutional leadership competencies.
L4	Monitor Succession Risk	Assess and track succession-related risks, such as lack of ready successors, overreliance on single incumbents, or approaching retirements.
L4	Report Succession Readiness	Produce regular reports summarizing bench strength, readiness levels, and succession coverage for critical roles.

Total Rewards

L3	Total Reward Strategy	Defines the institution's total rewards philosophy and overarching approach to compensation, benefits, and well-being to attract, retain, and motivate talent. This includes designing salary structures, pay practices, benefit offerings, and well-being programs that align with institutional values, labor agreements, and budget frameworks.
		Draft Definitions
L4	Define Total Reward Strategy	A total rewards strategy is a structured plan that integrates compensation, benefits, well-being, recognition, development, and work experience to create a compelling employee value proposition aligned with the organization's goals and culture. The goal is to attract, motivate, and retain employees by offering a mix of both monetary and non-monetary rewards.
L4	Maintain Total Reward Strategy	Maintain strategy, controls, and review cycles for rewards programs to incorporate updates and changes in approach.

Total Rewards

L3	Compensation Program Administration	Implements and maintains compensation programs, including salary structures, pay ranges, job evaluations, and compensation policies. This includes conducting market analyses, ensuring internal pay equity, and maintaining compliance with collective bargaining agreements, funding constraints, and academic ranks.
		Draft Definitions
L4	Evaluate Market Pay & Equity	Design and update salary bands, job classifications, and pay frameworks to support fair and transparent compensation. Stay current on best practices in Higher Ed compensation. Ensure that roles are compensated equitably based on market and internal factors.
L4	Create & Maintain Compensation Policies	Create and adjust effective compensation policies/Programs to ensure compensation decisions are made consistently throughout the University. Design and update salary bands, job classifications, and pay frameworks to support fair and transparent compensation.
L4	Conduct Annual Salary Review	Establish formal lines of authority and communication to ensure clear supervision, defined decision-making pathways, and accountability across the organizational hierarchy. This structure should cover interactions both within and between university functions. The annual salary adjustment process applies to Administrative Professional (AP) and Faculty employees. Its primary purpose is to record merit increases, but it also encompasses faculty promotions, equity adjustments, and special increases. The process is administered by the Budget Office and the Provost Office, in collaboration with Human Resources.
L4	Review Supplemental Pay & Stipends	Review and process all forms of compensation beyond base salary, such as stipends for special assignments, temporary duties, or academic responsibilities. Ensure these payments comply with institutional policies and budget guidelines. Additionally, evaluate and process off-cycle compensation adjustment requests throughout the year as needed. These may include, but are not limited to, equity adjustments and retention-related increases.
L4	Establish Period Pay Activity	Define and manage scheduled compensation events such as annual increases, bonuses, or adjustments (e.g., adjunct pay, summer pay, temporary base adjustments, etc.).

Total Rewards

L3	Benefit Program Administration	Manages the design, delivery, and compliance of employee benefit programs such as health insurance, retirement plans, life and disability coverage, tuition benefits, and wellness resources. Ensures alignment with the total rewards strategy and promotes holistic well-being through initiatives like campus health and financial education, mental health resources, and wellness workshops.
		Draft Definitions
L4	Align Benefits Strategy	Design and adjust benefits programs to align with organizational objectives, market benchmarks, and employee needs to support attraction, retention, and engagement.
L4	Design & Maintain Benefits Program	Create and manage health, retirement, and other benefit plans to support employee well-being. Ensure the suite of benefit offerings remain benchmarked, competitive, financially sound, and continuously enhanced through strategic plan design updates that attract, reward and retain top talent.
L4	Administer Health Insurance Benefits Programs	Administer comprehensive health insurance benefits programs to ensure accurate enrollment, plan and financial operations, compliance, and employee value.
L4	Administer Retirement Benefits Programs	Administer retirement benefits programs as the plan fiduciary to ensure compliance, accurate recordkeeping and prudent investment selections in accordance with the investment policy. This includes coordinating with the plan provider to optimize offerings and support employees in achieving their long-term financial goals.
L4	Administer Life & Disability Programs	Coordinate life and disability coverage, claims, and communications with employees and vendors.
L4	Administer Tuition Benefits Programs	Manage tuition assistance or remission programs for employees and eligible family members.
L4	Administer Employee Well-Being Programs	Administer initiatives that support employee physical, mental, financial, and emotional well-being, (e.g., wellness workshops, fitness programs, mental health resources, housing, and stress management tools, etc.).
L4	Oversee Administrators of Benefits Programs	Oversee relationships with administrators providing supplemental benefits such as insurance, or financial services.

Total Rewards

L3	Leave & Absence Program Administration	Administers all types of employee leave, including statutory (FMLA), contractual, and institution-specific leave programs (e.g., sabbatical, parental, and academic break leaves). Ensures compliance, accurate recordkeeping, and coordination with payroll, benefits, and departmental operations.
		Draft Definitions
L4	Administer Leave Request	Receive and route leave requests and if applicable, process reimbursements (e.g., FMLA, parental, leave without pay, etc.). Provide guidance on the appropriate use of leave and time-off programs, including FAMLI, FMLA, Parental Leave, Short- and Long-Term Disability, and other related absences. Review leave requests or initiate/correct processes. Support employees by interfacing with third-party administrators to resolve questions.
L4	Determine Leave Eligibility	Confirm eligibility (e.g., employee type, FTE, etc.) and required documentation per plan, policy or law. Confirm eligibility details (e.g. employee type, FTE, etc.) based on plan, policy, or legal requirements. For FAMLI, FMLA, and Parental Leave, work with third-party administrator. Advise employees of appropriate time-off options.
L4	Monitor and Maintain Time-Off Balances & Usage	Review entries for accuracy, adding adjustments and corrections when needed. Ensure required approvals are received with time-off/leave entries. Audit reported usage against policy and plan rules, resolve discrepancies, and confirm that payroll records reflect correct amounts for accurate pay.
L4	Maintain Leave Records	Maintain secure, compliant records for leave and time-off usage and ensure the maintenance of records of benefits programs by third-party administrators. Provide information related to required reporting.
L4	Manage Sabbatical Interface	Coordinate sabbatical administration with Faculty Affairs and academic units (HR interface only).

Employee & Labor Relations

L3	Employee Relations	Promotes a respectful, inclusive, and collaborative work environment by addressing employee concerns, resolving interpersonal conflicts, and fostering healthy communication. Includes proactive engagement with faculty, staff, unions, and academic leadership to strengthen workplace culture and ensure compliance with institutional values and policies.
		Draft Definitions
L4	Intake Employee Concerns	Receive and consult on employee-reported issues, complaints, or workplace concerns to determine appropriate next steps for inquiry and review.
L4	Provide Proactive Guidance	Offer expert advice and support to employees and managers on workplace issues, policies, and conflict resolution, in support of fair treatment, compliance, and a respectful work environment. Provide proactive guidance and training, especially for leaders, managers, and supervisors.
L4	Facilitate Difficult Conversations	Facilitate informal resolutions and support navigation of difficult conversations where appropriate.
L4	Document Employee Relations Interactions	Maintain a centralized log of all employee relations interactions, documenting actions taken, resolution outcomes, and timelines to ensure accountability and trend analysis.

Employee & Labor Relations

L3	Accountability Management	Administers accountability processes related to employee misconduct, behavioral issues, or policy violations. Ensures consistent application of corrective protocols across faculty, staff, and student employees, in alignment with institutional policies, union agreements, and legal standards.
		Draft Definitions
L4	Intake Accountability Concerns	Receive and assess reports of potential misconduct, behavioral issues, policy violations, or performance concerns.
L4	Conduct Investigation	Gather facts, interview involved parties and analyze evidence to determine whether a policy violation occurred.
L4	Administer Accountability Actions	Apply disciplinary procedures in alignment with institutional policy and collective bargaining agreements, ensuring due process and consistency.
L4	Interface with Institutional Partners	Collaborate with HR colleagues and other institutional compliance partners (e.g., OCRC, UGC, OGO, Research Integrity, Provost's Office, etc.) on cases involving harassment, discrimination, or policy violations that overlap with compliance mandates.
L4	Facilitate Resolution	Work with relevant parties to determine appropriate corrective or restorative actions (e.g., coaching, professional development actions, performance improvement plans, etc.), ensuring fair outcomes and documentation.
L4	Record Accountability Action	Document accountability decisions and actions in employee records for compliance and future reference.

Employee & Labor Relations

L3	Grievance Management	Interfaces with institutional partners to support a resolution process to support complaints filed by employees regarding workplace issues such as bullying, complaints, harassment, discrimination, retaliation, or contract violations.
		Draft Definitions
L4	Advise on Reported Concerns	Receive and document employee concerns related to workplace treatment or policy violations. Provide guidance on available resources and outline appropriate escalation pathways, ensuring employees understand the process.
L4	Interface with Institutional Partners	Collaborate with HR colleagues and designated institutional compliance partners (e.g., OCRC, UGC, OGO, Research Integrity, Provost's Office) to address grievances involving discrimination, harassment, or policy breaches. Maintain awareness of formal processes while supporting integrated handling across stakeholders.
L4	Facilitate Resolution	Engage involved parties in resolving grievances through negotiation, mediation, or formal determination processes. Support resolution efforts by coordinating with involved parties to implement and monitor compliance with agreed-upon action items.

Employee & Labor Relations

L3	Labor Relations & Contract Administration	Manages institutional relationships with labor unions and oversees the full lifecycle of collective bargaining agreements (CBAs) and employment contracts. This includes collective bargaining, contract interpretation, dispute resolution, and ensuring accurate implementation of agreements. Responsibilities extend to tracking obligations, monitoring key provisions and deadlines, preparing for renewals or renegotiations, and maintaining institutional compliance while fostering productive partnerships in unionized environments.
		Draft Definitions
L4	Manage Labor Unions & Work Councils	Oversee relationships and communications with labor unions and work councils, including contract negotiations, grievance handling, and collaborative initiatives.
L4	Monitor Compliance	Track and monitor adherence to collective bargaining agreements, labor laws, and institutional policies governing unionized employment.
L4	Manage Collective Bargaining Agreement Process	Oversee the administration of collective bargaining agreements, including interpretation, tracking of provisions, and implementation of contractual commitments. Communicate actions, changes, and provisions to employees.
L4	Negotiate Collective Bargaining Agreements	Lead or support contract negotiations with unions, including preparation, bargaining, and documentation of agreed terms.
L4	Coordinate with Legal	Collaborate with legal counsel so that all aspects of collective bargaining agreements are compliant with labor laws and institutional policies, including contract language review, dispute resolution, and legal risk mitigation.
L4	Approve & Monitor Collective Bargaining Agreements	Review and authorize collective bargaining agreements and continuously monitor their implementation to ensure compliance with negotiated terms and institutional policies. Communicate changes or provisions made to CBAs when appropriate.

Workforce Administration

L3	Workforce Data Updates	Administers administrative updates to position-related records, including title, classification, salary range, salary adjustment, funding source, and reporting structure. Also includes the maintenance of individual workforce records such as demographic details, job status, benefits eligibility, and employment history. Ensures accuracy for downstream processes including payroll, benefits, compliance, and institutional reporting.
		Draft Definitions
L4	Manage Position Data	Establish universal, auditable, and enforceable standards and oversight for the collection, use, and protection of HR data. Maintain the data dictionary.
L4	Manage Employee Records	Ensure employee data is accurate, secure, and up-to-date across HR systems.
L4	Process Employment Status Changes	Execute updates to employee records in response to changes such as promotions, transfers, terminations, or leaves, ensuring timely and accurate reflection in HR systems.
L4	Process External Employment Verification Requests	Process requests from external parties (e.g., new employers, lenders, other authorized entities, etc.) to confirm employment-related details for current, former, or prospective employees. These requests may include verification of job titles, employment dates, earnings, salary or pay rates, and—when authorized by the employee—additional information such as performance history or feedback from supervisors or HR.

Workforce Administration

L3	Workforce Separation Processing – Voluntary & Involuntary	Manages the procedural and compliance aspects of employee separations, including resignations, retirements, and terminations. Ensures institutional policy adherence, timely coordination with departments, and preparation for final processing.
		Draft Definitions
L4	Initiate Separation	Begin the employee separation process by formally documenting and submitting a notice of resignation, retirement, voluntary and involuntary contract, or non-contract termination. This step typically includes verifying eligibility, collecting required information, and notifying HR or the appropriate administrative unit.
L4	Record Separation Reason	Document the specific reason for an employee's separation (e.g., resignation, retirement, layoff (includes grant fund end), end of appointment, termination for cause) in the HR information system to support accurate reporting, compliance tracking, and workforce analytics.
L4	Coordinate Final Pay	Ensure accurate and timely calculation and disbursement of an employee's final pay, including regular earnings, taxable benefits, accrued leave payouts, deductions, and any other applicable payments, in compliance with institutional policies and state or federal regulations.

Workforce Administration

L3	Offboarding	Facilitates the final steps of an employee's departure, including exit interviews, knowledge transfer, system and building access removal, and final paycheck coordination.
		Draft Definitions
L4	Conduct Exit Interviews	A structured process held with departing employees to gather feedback on their experience, identify improvement opportunities, and ensure a respectful closure. The interview also supports knowledge transfer and contributes to continuous improvement of institutional processes.
L4	Conduct Knowledge Transfer	Capture and share critical institutional, project, and role-specific knowledge from departing employees to ensure continuity of operations and minimize disruption. This includes documenting processes, transferring ownership of ongoing work, and enabling successors or teams to access essential information.
L4	Revoke System Access	The formal process of terminating digital access rights and privileges for departing employees. This includes submitting IT helpdesk tickets to deactivate accounts, remove access to institutional systems (e.g., HRIS, LMS, finance platforms), and ensure data security.
L4	Collect Institutional Property	The retrieval of university-owned assets such as laptops, ID cards, keys, mobile devices, and other equipment issued during employment. This process ensures that all property is accounted for and returned prior to the employee's departure. It supports asset tracking and minimizes loss or misuse.
L4	Complete Final Documentation	The finalization of all required paperwork and system updates related to the employee's separation. This includes termination forms, benefits offboarding, payroll adjustments, and updates to the employee record in systems.

Workforce Administration

L3	Relocation	Supports employees with domestic relocation logistics related to new hires, transfers, or promotions. Coordinates with internal stakeholders and external vendors to ensure a smooth transition.
		Draft Definitions
L4	Determine Relocation Eligibility	Assess whether an employee or new hire qualifies for relocation assistance based on institutional policies, appointment type, and funding availability. This includes reviewing offer details, role requirements, and applicable relocation guidelines.
L4	Coordinate with Relocation Vendors	Serve as the liaison between the institution, the employee, and third-party relocation vendors to obtain quotes and arrange services such as moving, travel, housing, and temporary accommodations.
L4	Manage Relocation Expenses	Administer and track relocation-related expenses, ensuring they align with institutional policy, funding limits, and tax regulations. This includes processing reimbursements, validating receipts, and maintaining accurate financial records.
L4	Support International Relocation	Provide specialized guidance and support for relocations across international borders, including visa and immigration coordination, cultural orientation, tax implications, and compliance with international employment laws and institutional policies.
L4	Manage Assignment End	Oversee the conclusion of temporary or long-term assignments, ensuring timely completion of logistical, financial, and administrative steps such as housing closure, final reimbursements, repatriation arrangements, and return-to-home department coordination.

Workforce Administration

L3	Sponsorship	Supports employees with visa sponsorship logistics for international candidates. This function ensures compliance with immigration regulations and facilitates smooth transitions for global talent.
		Draft Definitions
L4	Assess Sponsorship Eligibility	Evaluate whether a prospective or current employee qualifies for institutional sponsorship under applicable visa categories (e.g., H-1B, J-1, TN). This includes reviewing the individual's role, qualifications, funding source, and institutional policies to determine eligibility for sponsorship. Work with candidate or employee to answer next steps, answer questions, and provide supplemental information.
L4	Process I-9 and E-Verify	Complete and verify employment eligibility documentation for all new hires and rehires in compliance with federal requirements. This includes collecting and reviewing Form I-9, submitting information through the E-Verify system, and maintaining accurate records in accordance with institutional and legal standards.
L4	Prepare Visa & Immigration Documentation	Compile and submit all necessary documentation to support visa petitions, extensions, and other immigration-related filings. Coordinate with employees, departments, and government agencies to ensure timely and accurate submission of required forms, supporting materials, and institutional attestations.
L4	Maintain Sponsorship Records	Maintain accurate and up-to-date records for all sponsored employees and visiting scholars, including visa status, expiration dates, and compliance documentation. Ensure institutional and federal reporting requirements are met and that records are retained in accordance with legal and policy standards.

Workforce Administration

L3	Transfer & Retention Management	Facilitates internal employee movements—such as transfers, promotions, and reclassifications—ensuring compliance with policy and equity standards. Supports retention strategies by aligning role changes with career development, succession planning, and institutional workforce needs.
		Draft Definitions
L4	Process Transfers	Administer the movement of employees between departments, colleges, campuses, or positions within the institution. This includes coordinating approvals, updating HR and payroll systems, adjusting reporting structures, and ensuring continuity of pay, benefits, and service credit in accordance with institutional and state policies.
L4	Process Reclassification	Evaluate and implement changes to an employee's job classification based on a significant and sustained change in duties, responsibilities, funding source, or other eligibility criteria. This involves reviewing position descriptions, validating justification and documentation, obtaining approvals, and updating job records and compensation as appropriate.
L4	Process Reinstatement for State Classified Personnel	Facilitate the return of former state-classified employees to employment within their reinstatement eligibility period, as defined by state rules. This includes verifying eligibility, coordinating with hiring units, restoring service credit or benefits as applicable, and updating employment records in compliance with state and institutional policy.
L4	Monitor Retention Risks	Track and analyze indicators of potential employee turnover—such as engagement data, exit trends, or survey results—to identify areas of retention concern. Collaborate with leadership and HR partners to recommend strategies for improving employee engagement, satisfaction, and retention outcomes.

HRIS & Data Management

L3	Data Architecting	Designs and builds the structure of HR data systems to support institutional reporting, analytics, integration, and compliance. This includes unifying data across decentralized units while ensuring alignment with institutional data governance standards.
		Draft Definitions
L4	Model HR Data	Define HR data models and structures to support reporting, analytics, and compliance.
L4	Define Integration Specifications	Document functional and technical requirements for data exchange between the HRIS and other institutional systems. Specify data elements, frequency, direction, security, and validation rules. *Shared responsibility with IT – joint project*
L4	Validate Data Architecture	Review and ensure that HR data structure, storage, transfers, and flows support institutional reporting, security, and operational needs. Confirm that architecture aligns to enterprise data standards and technology strategy. *Shared responsibility with IT – joint project*
L4	Maintain Data Dictionary	Create and maintain standardized definitions, formats, and business rules for HR data elements to ensure consistency across systems, reporting outputs, and stakeholders. *Shared responsibility with IT – joint project*

HRIS & Data Management

L3	Data Management	Maintains secure, accurate, and accessible HR data systems to support reporting, compliance, and strategic planning. Managing data across decentralized units and integrating with academic, financial, and student systems in accordance with institutional data governance standards.
		Draft Definitions
L4	Govern HR Data	Establish standards and oversight for the collection, use, and protection of HR data.
L4	Manage Records and Files	Maintain HR documentation (supervisory, personnel, department, electronic capture of documents) in accordance with retention policies and privacy regulations.
L4	Maintain Data Quality	Maintain the accuracy, consistency, and integrity of HR data across systems by applying validation rules, conducting audits, and resolving discrepancies.

HRIS & Data Management

L3	HR Reporting & Analytics	Develops and delivers data-driven insights from HR systems to support strategic decision-making, operational monitoring, and regulatory compliance. Includes the creation of dashboards, workforce analytics, and customized reporting for academic and administrative leaders.
		Draft Definitions
L4	Maintain Standard Reporting	Build and maintain standard reports with *defined* frequencies. *Shared responsibility with IT – joint project, IT may help with building the dashboards in PowerBI, In Workday – IT is expected to be developed more advanced reporting capabilities /dashboards in the future*
L4	Fulfill Ad Hoc Reporting Requests	Respond to one-off reporting requests with governed processes.
L4	Maintain Analytics Dashboards	Develop and maintain interactive dashboards that provide real-time insight into workforce trends and HR performance metrics. Ensure usability and accessibility for stakeholders at varying levels of data literacy.
L4	Support Audit Reporting	Provide required data, documentation, and reporting to internal and external auditors. Ensure reporting accuracy and timely submission to support audit compliance and risk mitigation. *Shared responsibility with IT – joint project*

HRIS & Data Management

L3	HR System Business Architecture	Defines the business and technical requirements of HR systems (e.g., Workday, DMS, etc.) to ensure they align with institutional processes, user needs, and strategic goals. This involves supporting complex workflows across multiple campuses and departments.
		Draft Definitions
L4	Define Business Requirements	Gather and document HR business needs to inform system configuration, enhancements, or new system functionality. Translate stakeholder needs into clear functional requirements.
L4	Design System Solutions	Create solution designs that meet documented business requirements while maintaining system integrity and alignment with institutional architecture and HR processes.
L4	Configure Workflow Rules	Build and adjust automated workflows (e.g., approvals, notifications) within HR systems to support efficient and consistent HR processes.
L4	Validate System Changes	Test configuration updates, system patches, releases, and integration changes to ensure accuracy, performance, and expected functionality before deployment.
L4	Document System Architecture	Maintain documentation of HRIS system structures, data flows, integrations, and configuration decisions to support continuity, onboarding, and troubleshooting.

HRIS & Data Management

L3	HR Application Support	Provides operational support and maintenance for HR technology platforms. Includes troubleshooting, user support, system configuration, updates, and ensuring seamless integration with related enterprise systems such as payroll, finance, and student services.
		Draft Definitions
L4	Triage User Tickets	Receive, classify, and route HR system support requests based on urgency, complexity, and impact. Coordinate resolution with internal support teams or vendors when needed.
L4	Resolve Application Issues	Investigate and correct system errors, configuration problems, data anomalies, user access or permission issues to restore functionality. *Workday will be single sign on - IT*
L4	Manage Release Updates	Plan, test, and deploy vendor updates, patches, and new features. Communicate changes to users and ensure continuity of operations. *This will need to be an interaction / coordinated effort with IT – not defined for future state currently this is an HR function.*
L4	Maintain Integrations	Monitor and resolve integration failures and data discrepancies. *This will need to be an interaction / coordinated effort with IT – this still needs to be defined for the future state*

HRIS & Data Management

L3	Data Security	Implements and enforces policies, tools, and procedures to safeguard sensitive HR data. Ensures confidentiality, integrity, and availability of employee and institutional data in accordance with legal requirements and institutional policy.
		Draft Definitions
L4	Request, Review & Assign Role Permissions	Grant system access based on defined role-based access models. Ensure permissions align with job responsibilities and comply with institutional security policies. Coordinate permissions updates when there are changes to employee roles and revoke system access upon termination.
L4	Conduct Access Audit	Conduct periodic reviews of system access to confirm appropriateness, identify access risks, and ensure least-privilege principles are applied.
L4	Support Incident Management	Respond to HR system security or performance incidents by coordinating investigation, escalation, communication, and resolution activities. *Usually comes through IT and HR responds / collaborates*
L4	Remediate Security Risks	Identify vulnerabilities through system assessments, audits, or monitoring tools, and implement corrective actions to mitigate potential threats. *Usually comes through IT and HR responds / collaborates*
L4	Support Audit Security Compliance	Perform regular security audits to confirm compliance with institutional policies, regulatory standards, and data governance requirements. *Usually comes through IT and HR responds / collaborates*

Time & Labor

L3	Scheduling	Plans and manages employee work schedules to ensure appropriate staffing levels, compliance with labor contracts, and alignment with academic and operational calendars. This includes coordinating variable schedules for administrative staff, student workers, academic support staff, and facilities personnel.
		Draft Definitions
L4	Build Work Schedule	Create and maintain employee work schedules based on institutional policies, position type, and operational needs. This includes defining standard hours, shifts, and work patterns while considering labor agreements, academic calendars, and department coverage requirements.
L4	Apply Shift Differential	Assign and calculate premium pay rates for employees who work designated non-standard shifts (e.g., evening, night, weekend, holiday, etc.). Ensure accurate application of differential rules in compliance with institutional policy, collective bargaining agreements, and regulatory standards.
L4	Adjust Schedule Exception	Modify published work schedules to accommodate unplanned absences, operational changes, or employee requests. Update records to reflect schedule deviations, ensuring alignment with timekeeping and pay accuracy.
L4	Validate Schedule Compliance	Review work schedules to confirm adherence to institutional, contractual, and regulatory requirements—such as overtime limits, rest periods, or maximum hours. Identify and address scheduling conflicts or compliance risks before schedules are finalized.
L4	Publish Schedule	Distribute finalized work schedules to employees and supervisors through designated systems or communication channels. Ensure visibility and timely access to scheduling information for workforce planning and accountability.

Time & Labor

L3	Time Tracking	Captures and monitors employee work hours to ensure payroll accuracy, compliance with labor laws, and alignment with institutional policies. Supports attendance management, productivity analysis, and labor cost tracking.
		Draft Definitions
L4	Capture Time Entry	Record employee work hours through approved timekeeping methods (e.g., electronic timesheets, punch clocks, automated integrations, etc.). Ensure time entries accurately reflect worked hours, leave taken, and applicable pay codes. Follow up with people leaders with timecards that have not yet been approved.
L4	Validate Time Exception	Review time entries for discrepancies, such as missed punches, overlapping shifts, or unapproved overtime. Work with supervisors and employees to correct exceptions before payroll processing.
L4	Approve Timecards	Review and validate employee-submitted timecards for accuracy, completeness, and compliance with policies. Approvals confirm readiness for export to payroll.
L4	Export Timecard to Payroll	Transmit approved time and labor data to the payroll system for payment processing. Ensure successful and accurate integration of hours worked, leave taken, and applicable pay codes.
L4	Reconcile Time Errors	Identify and resolve discrepancies between timekeeping data and payroll outputs. Investigate causes of variances, correct records, and coordinate with HR, payroll, or managers to maintain data accuracy.

Time & Labor

L3	Time Off & Leave	Administers employee absences, including vacation, sick leave, personal days, and other approved leave types. Ensures leave is tracked accurately in accordance with institutional policies, collective bargaining agreements, and applicable laws.
		Draft Definitions
L4	Manage Time Off Requests	Manage employee requests for time off, including vacation, sick leave, and other types of paid or unpaid leave as needed. Ensure requests are routed for approval and recorded accurately in the time and attendance system.
L4	Approve Time Off Requests	Review and authorize employee leave requests based on eligibility, departmental staffing, and policy guidelines. Approved requests update schedules and leave balances automatically.
L4	Reconcile Leave Balance	Regularly review and adjust employee leave balances to ensure accuracy with institutional policy and payroll data. Resolve discrepancies due to retroactive changes, accrual errors, or manual adjustments.
L4	Report Leave Usage	Generate reports summarizing employee leave activity, trends, and balances to support workforce planning, compliance reporting, and management decision-making.

Payroll

L3	Payroll Administration	Directs and optimizes the entire payroll operation to deliver timely, complete, and fully compliant compensation for all employee groups - including faculty, staff, student workers, and grant-funded roles. Oversees pay schedules, compensation compliance, and the seamless integration of payroll with benefits administration and tax remittance authorities.
		Draft Definitions
L4	Define Pay Calendar	Lead the design and publication of calendar year payroll schedules that optimize time entry, approval, and processing workflows across all employee groups ensuring transparency of processing deadlines.
L4	Payroll Policy & Regulatory Compliance	Establish and uphold payroll policies and control frameworks that ensure accurate processing, effective operational management, and full compliance with taxing authorities.
L4	Maintain Payroll Controls	Maintain segregation of duties, enforce multi-level approvals, and conduct regular reconciliations to ensure accuracy, prevent errors, and safeguard against fraud in payroll processing.
L4	Maintain Payroll Inquiries	Manage payroll inquiries. Ensure consistent service standards and accuracy in resolving questions and issues.

Payroll

L3	Employee Data Administration	Manages the integrity of payroll-related employee records, such as tax withholding status, direct deposit details, job classifications, and compensation data. Ensures accurate data integration across HR and Financial systems to support payroll processing and compliance.
		Draft Definitions
L4	Maintain Payroll Data	Ensure the accuracy and completeness of employee payroll information within the HR and payroll systems, including earnings, deductions, benefits, tax withholdings, and banking details, as well as updating records to reflect employment or compensation changes.
L4	Validate Payroll Data Changes	Review and verify updates to payroll-related information - such as salary adjustments, new hires, terminations, work location changes, terminal pay, tax calculations, and benefit deductions to ensure accuracy, proper authorizations, and compliance with institutional policies and regulatory requirements prior to payroll processing.
L4	Synchronize HR Payroll Data	Reconcile and align payroll-related information across the HR system, Finance system, and third-party applications (e.g., ADP) to ensure accuracy and data integrity. Identify and resolve discrepancies between systems, verify that changes in one system are accurately reflected in all others, and implement ongoing monitoring and validation processes. Collaborate with HR, Finance, and IT teams to maintain seamless integration, support compliant payroll processing, and mitigate operational or regulatory risks.

Payroll

L3	Payroll Tax Administration	Manage payroll tax compliance, including accurate calculation, withholding, reporting, and timely remittance of federal, state, and local taxes. Ensure adherence to specialized requirements such as treaty and non-resident tax obligations, as well grant-funded positions. Maintain compliance through regular review of regulatory changes and reconciliation of tax records.
		Draft Definitions
L4	Calculate Taxes	Determine and apply federal, state, and local tax withholding, along with employer tax obligations, based on current regulations and employee specific factors like tax treaties and work locations.
L4	File Tax Returns	Prepare, review, and submit required payroll tax filings to federal, state, and local agencies within prescribed deadlines. Reconcile filings to ensure accuracy, completeness with all withholdings and contributions. Ensure compliance with applicable laws and institutional policies, mitigating risk and supporting timely, accurate payroll operations.
L4	Remit Tax Payments	Transmit payroll taxes and employer/employee tax liabilities to the appropriate tax authorities according to established schedules. Ensure payments match reported liabilities and maintain accurate records for audit and compliance purposes.
L4	Resolve Tax Notices	Investigate and respond to inquiries, discrepancies, or notices from tax authorities. Collaborate with internal teams and external agencies to correct errors, submit required documentation, and ensure timely resolution to maintain compliance and avoid penalties.

Payroll

L3	Payroll Processing	Performs payroll runs by calculating gross-to-net pay, applying deductions, and issuing payments. Ensures accuracy and compliance with federal and state regulations, union agreements, institutional policies, and payroll calendars.
		Draft Definitions
L4	Calculate Gross to Net	Compute each employee's net pay by applying all relevant earnings, adjustments, deductions, and taxes to gross pay, including overtime, benefits, retirement contributions, garnishments, and other applicable adjustments, in accordance with institutional and regulatory requirements.
L4	Process Payroll Run	Execute the end-to-end payroll cycles for all employee groups, including validating inputs, performing calculations, reviewing preliminary results, correcting errors, and finalizing payroll for approval and disbursement.
L4	Resolve Payroll Exception	Identify and correct errors or anomalies that occur during payroll processing—such as missing data, calculation issues, or rejected transactions—to ensure accurate and timely pay distribution.
L4	Process Special Payments	Administer payments outside the regular payroll schedule that require individual review, monitoring, and approval.
L4	Distribute Pay	Issue employee payments via direct deposit, or, in limited circumstances, by paper check, ensuring accurate and timely payment. Coordinate with the university's financial institution and internal departments to resolve any incorrect-pay issues.

Payroll

L3	Payroll Accounting	Manages the financial accounting of payroll, including journal entries, reconciliations, and audit preparation. Oversees payroll liabilities, cost allocations, and labor distributions across departments, grants, and restricted accounts to ensure accuracy, compliance, and proper financial reporting.
		Draft Definitions
L4	Reconcile Payroll Account	Review payroll transactions recorded in the payroll system and compare them with corresponding entries in the general ledger and bank statements. Identify, investigate, and resolve discrepancies to ensure the accuracy, completeness, and integrity of payroll-related accounts.
L4	Post Payroll Journal	Record payroll expenses, liabilities, and related adjustments in the university's financial system. Ensure that journal entries are accurate, properly classified, and posted to the appropriate accounting periods and cost centers to maintain precise financial reporting and compliance.
L4	Allocate Payroll Cost	Distribute payroll expenses to the appropriate funding sources, departments, or projects based on labor distribution data, effort reporting, or cost allocation rules. Create and process payroll accounting adjustments. Ensure compliance with institutional policies, and accounting standards.
L4	Prepare Payroll Audit	Compile and provide documentation to support internal or external audits of payroll processes. Ensure data accuracy, demonstrate compliance with institutional and legal requirements, and address auditor inquiries promptly.

Payroll

L3	Payroll Reporting & Application Support	Delivers operational and compliance reporting for payroll systems. Provides technical support, access management, system maintenance, and audit & reconciliation assistance. Supports data extraction and analytics for institutional decision-making.
		Draft Definitions
L4	Report Payroll Compliance	Generate and submit required payroll compliance reports, such as wage and hour reports, or government-mandated labor reports. Ensure accuracy and adherence to applicable deadlines and regulations.
L4	Report Payroll Analytics	Produce analytical reports and insights on payroll trends, costs, and workforce patterns. Support institutional decision-making through data visualizations and key performance metrics related to payroll operations.
L4	Support Payroll Application	Provide functional and technical support for the payroll system, including testing updates, troubleshooting issues, and coordinating with the HRIS team, or vendors on system enhancements, integrations, and process improvements.
L4	Manage Payroll Access	Administer user roles, permissions, and security roles within the payroll system, in coordination with the HRIS team, to ensure appropriate access controls and data security. Regularly review and update access rights to maintain compliance with institutional policies and data protection standards to internal and external systems.